

Administration Update December 2024

Claire Newbery

Pensions Operations Manager



Avon
Pension
Fund



Your pension, your future

Agenda



- Workflow & MI
- Priorities for next 3 months

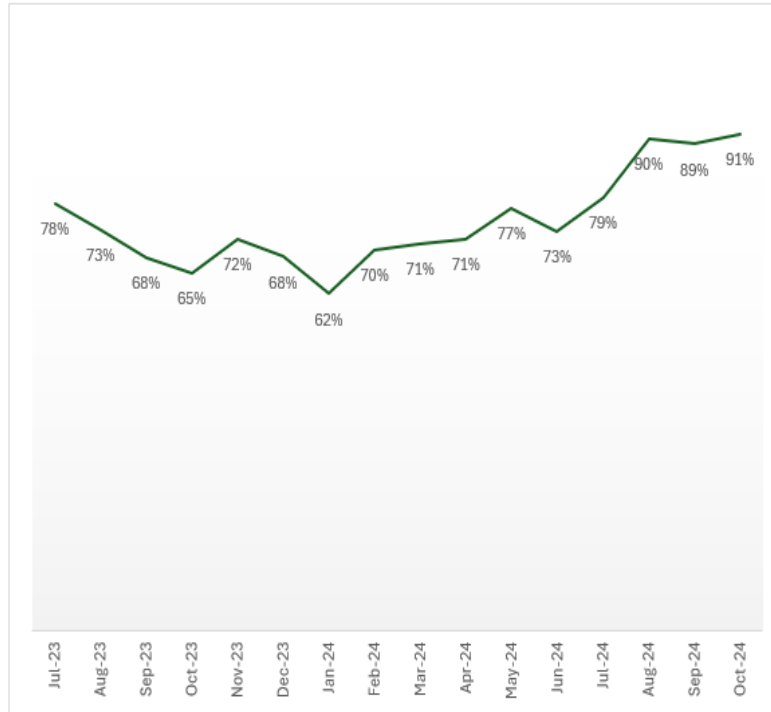
KPI's



SLA monthly performance average July 2023 to October 2024

Average SLA Performance

*Based on weekly KPI data



KPI Category	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Cases Created Jun-23 to Oct-24
Death Notification	25%	59%	68%	74%	64%	92%	57%	20%	62%	46%	31%	65%	65%	84%	85%	95%	791
Death - Act/Def/Pen - Payment	67%	87%	47%	77%	79%	84%	76%	68%	88%	100%	69%	88%	93%	100%	67%	63%	624
Retirement (Active) - Quote	72%	37%	37%	30%	25%	39%	32%	37%	30%	31%	30%	35%	52%	81%	86%	85%	2,493
Retirement (Active) - Actual	86%	60%	91%	68%	73%	83%	77%	76%	95%	95%	77%	47%	78%	91%	95%	99%	1,492
Retirement (Deferred) - Quote	97%	62%	36%	34%	28%	38%	17%	30%	35%	36%	57%	60%	91%	83%	92%	88%	2,960
Retirement (Deferred) - Actual	78%	71%	50%	90%	83%	73%	52%	33%	82%	75%	66%	40%	68%	98%	98%	94%	2,038
Divorce - Quote	82%	100%	92%	100%	67%	84%	39%	78%	49%	59%	66%	66%	83%	100%	100%	93%	346
Divorce - Actual	0%	N/A	N/A	100%	N/A	N/A	100%	N/A	N/A	N/A	N/A	N/A	100%	100%	100%	100%	16
Refund - Quotes	24%	24%	25%	5%	26%	15%	31%	66%	68%	22%	77%	69%	34%	88%	91%	79%	3,804
Refund - Actual	19%	62%	89%	72%	93%	37%	12%	31%	13%	84%	85%	65%	78%	88%	88%	95%	1,301
Deferred Benefits	72%	64%	44%	34%	73%	35%	35%	50%	28%	62%	67%	62%	80%	79%	60%	94%	3,655
Transfer In (Active) - Quote	50%	6%	50%	0%	9%	19%	20%	17%	26%	3%	6%	13%	17%	74%	77%	90%	607
Transfer In (Active) - Actual	50%	56%	67%	18%	54%	50%	0%	29%	64%	100%	33%	56%	27%	56%	86%	28%	219
Transfer Out (Active/Deferred) - Quote	45%	41%	0%	22%	4%	29%	14%	17%	1%	16%	14%	4%	30%	26%	14%	19%	1,522
Transfer Out (Active/Deferred) - Actual	44%	40%	0%	55%	94%	100%	100%	100%	100%	73%	100%	100%	94%	100%	100%	100%	159
Employer Estimate - Quote	67%	100%	79%	60%	54%	50%	93%	89%	77%	65%	100%	36%	94%	78%	93%	91%	238
Member Estimate - Quote	99%	98%	81%	83%	92%	88%	94%	99%	81%	66%	94%	50%	85%	93%	95%	93%	897
Joiner	98%	98%	98%	96%	99%	99%	93%	100%	100%	100%	100%	100%	99%	100%	100%	100%	17,645
Weighted Average	78%	73%	68%	65%	72%	68%	62%	70%	71%	71%	77%	73%	79%	90%	89%	91%	

KPI cases completed Oct 2024 – 17th Nov 2024

		01/10/2024 to 17/11/2024									
		Actual Days to Process									
		0 to 5	6 to 10	11 to 15	16 to 20	21 to 25	26 to 30	31 to 40	41 to 45	46 to 59	60+
Death Notification	5 Days	56	6	0	1	0	0	0	0	0	0
Death - Act/Def/Pen - Payment	10 Days	18	9	5	3	1	0	1	0	0	0
Retirement (Active) - Quote	15 Days	81	81	35	16	8	7	6	0	2	12
Retirement (Active) - Actual	15 Days	146	45	4	1	0	0	1	1	0	1
Retirement (Deferred) - Quote	30 Days	20	81	73	96	25	8	13	6	8	7
Retirement (Deferred) - Actual	15 Days	181	31	5	3	3	1	1	2	1	1
Divorce - Quote	45 Days	14	6	1	0	0	0	0	0	0	1
Divorce - Actual	15 Days	1	1	0	0	0	1	0	0	0	0
Refund - Quotes	10 Days	120	98	27	12	1	0	0	0	1	0
Refund - Actual	10 Days	55	7	2	0	0	0	1	0	0	0
Deferred Benefits	30 Days	68	50	64	19	16	6	8	2	2	14
Transfer In (Active) - Quote	10 Days	38	15	4	2	2	0	0	1	0	1
Transfer In (Active) - Actual	10 Days	4	7	10	8	7	2	0	0	0	1
Transfer Out (Active/Deferred) - Quote	10 Days	11	9	17	12	8	11	15	20	24	23
Transfer Out (Active/Deferred) - Actual	10 Days	11	0	0	0	0	0	0	0	0	0
Employer Estimate - Quote	15 Days	17	3	5	1	0	0	0	0	0	0
Member Estimate - Quote	15 Days	23	33	2	2	1	0	0	0	0	1
Joiner	40 Days	252	79	363	1375	117	4	0	0	0	0

KPI cases completed Oct 2024 to 17th Nov 24

(case numbers v target % of total completed within day range)



		01/10/2024 to 17/11/2024										
		Actual Days to Process										
		0 to 5	6 to 10	11 to 15	16 to 20	21 to 25	26 to 30	31 to 40	41 to 45	46 to 59	60+	Completed Within Target
Death Notification	5 Days	89%	10%	-	2%	-	-	-	-	-	-	89%
Death - Act/Def/Pen - Payment	10 Days	49%	24%	14%	8%	3%	-	3%	-	-	-	73%
Retirement (Active) - Quote	15 Days	33%	33%	14%	6%	3%	3%	2%	-	1%	5%	79%
Retirement (Active) - Actual	15 Days	73%	23%	2%	1%	-	-	1%	1%	-	1%	98%
Retirement (Deferred) - Quote	30 Days	6%	24%	22%	28%	7%	2%	4%	2%	2%	2%	90%
Retirement (Deferred) - Actual	15 Days	79%	14%	2%	1%	1%	0%	0%	0.9%	0.4%	0.4%	95%
Divorce - Quote	45 Days	64%	27%	5%	-	-	-	-	-	-	5%	95%
Divorce - Actual	15 Days	33%	33%	-	-	-	33%	-	-	-	-	67%
Refund - Quotes	10 Days	46%	38%	10%	5%	0%	0%	0%	0.0%	0%	0%	84%
Refund - Actual	10 Days	85%	11%	3%	-	-	-	2%	-	-	-	95%
Deferred Benefits	30 Days	27%	20%	26%	8%	6%	2%	3%	1%	1%	6%	90%
Transfer In (Active) - Quote	10 Days	60%	24%	6%	3%	3%	-	-	2%	-	2%	84%
Transfer In (Active) - Actual	10 Days	10%	18%	26%	21%	18%	5%	-	-	-	3%	28%
Transfer Out (Active/Deferred) - Quote	10 Days	7%	6%	11%	8%	5%	7%	10%	13%	16%	15%	13%
Transfer Out (Active/Deferred) - Actual	10 Days	100%	-	-	-	-	-	-	-	-	-	100%
Employer Estimate - Quote	15 Days	65%	12%	19%	4%	-	-	-	-	-	-	96%
Member Estimate - Quote	15 Days	37%	53%	3%	3%	2%	-	-	-	-	2%	94%
Joiner	40 Days	12%	4%	17%	63%	5%	0%	-	-	-	-	100.0%

KPI cases completed Oct 2024 to 17th Nov 2024

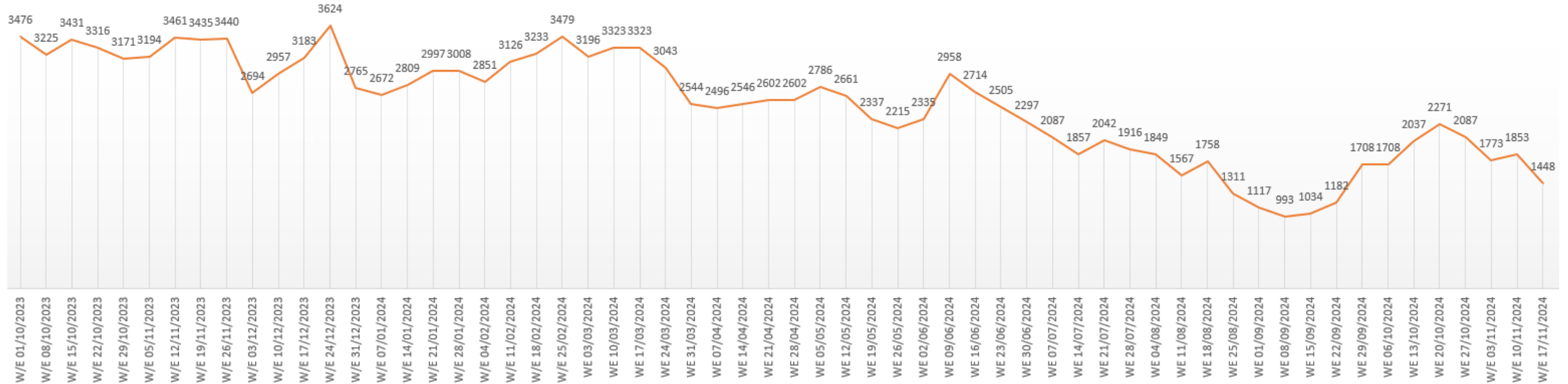
(cases numbers v target – cumulative % processed)



		01/10/2024 to 17/11/2024									
		Actual Days to Process									
		0 to 5	6 to 10	11 to 15	16 to 20	21 to 25	26 to 30	31 to 40	41 to 45	46 to 59	60+
Death Notification	5 Days	89%	98%	98%	100%						
Death - Act/Def/Pen - Payment	10 Days	49%	73%	86%	95%	97%	97%	100%			
Retirement (Active) - Quote	15 Days	33%	65%	79%	86%	89%	92%	94%	94%	95%	100%
Retirement (Active) - Actual	15 Days	73%	96%	98%	98%	98%	98%	99%	99%	99%	100%
Retirement (Deferred) - Quote	30 Days	6%	30%	52%	80%	88%	90%	94%	96%	98%	100%
Retirement (Deferred) - Actual	15 Days	79%	93%	95%	96%	97%	98%	98%	99%	100%	
Divorce - Quote	45 Days	64%	91%	95%	95%	95%	95%	95%	95%	95%	100%
Divorce - Actual	15 Days	33%	67%	67%	67%	67%	100%				
Refund - Quotes	10 Days	46%	84%	95%	99%	100%	100%				
Refund - Actual	10 Days	85%	95%	98%	98%	98%	98%	100%			
Deferred Benefits	30 Days	27%	47%	73%	81%	87%	90%	93%	94%	94%	100%
Transfer In (Active) - Quote	10 Days	60%	84%	90%	94%	97%	97%	97%	98%	98%	100%
Transfer In (Active) - Actual	10 Days	10%	28%	54%	74%	92%	97%	97%	97%	97%	100%
Transfer Out (Active/Deferred) - Quote	10 Days	7%	13%	25%	33%	38%	45%	55%	69%	85%	100%
Transfer Out (Active/Deferred) - Actual	10 Days	100%	100%	100%							
Employer Estimate - Quote	15 Days	65%	77%	96%	100%						
Member Estimate - Quote	15 Days	37%	90%	94%	97%	98%	98%	98%	98%	98%	100%
Joiner	40 Days	12%	15%	32%	94%	100%					

Total KPI's outstanding – Oct 2023 to 17th Nov 2024

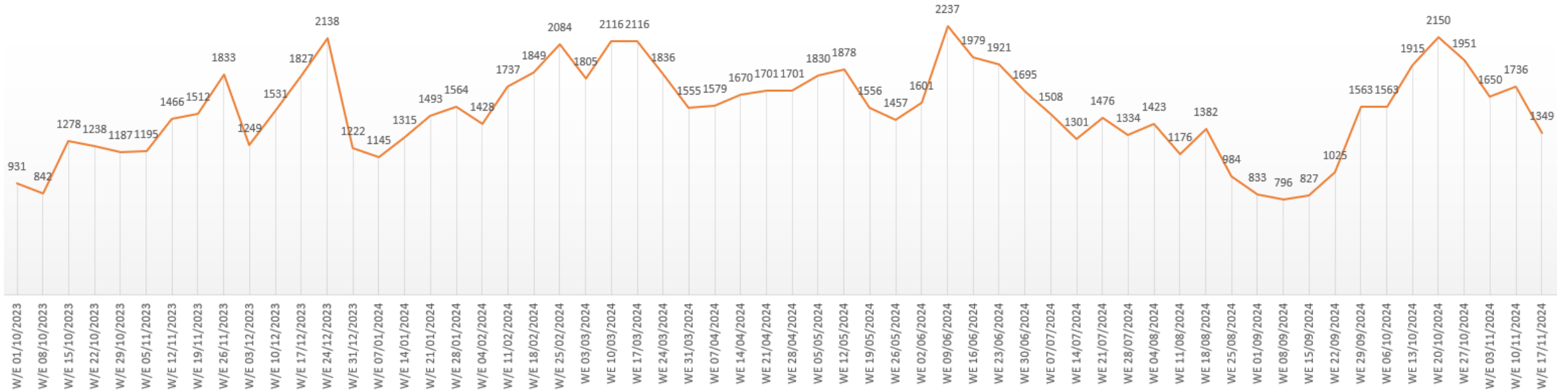
KPI Cases Outstanding



KPI cases outstanding under 31 days – Oct 2023 – 17th Nov 2024

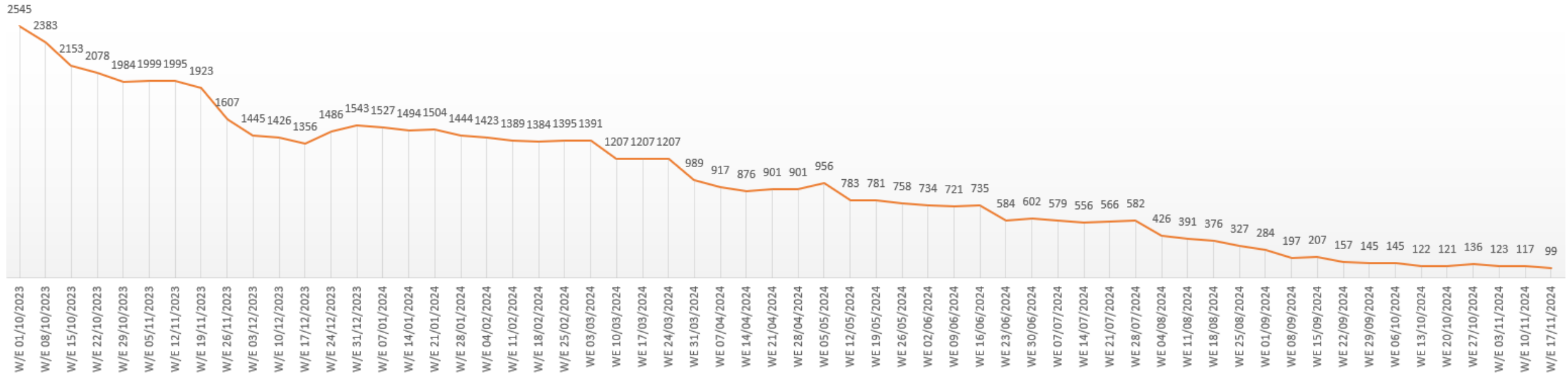


KPI Cases Outstanding Under 31 Days



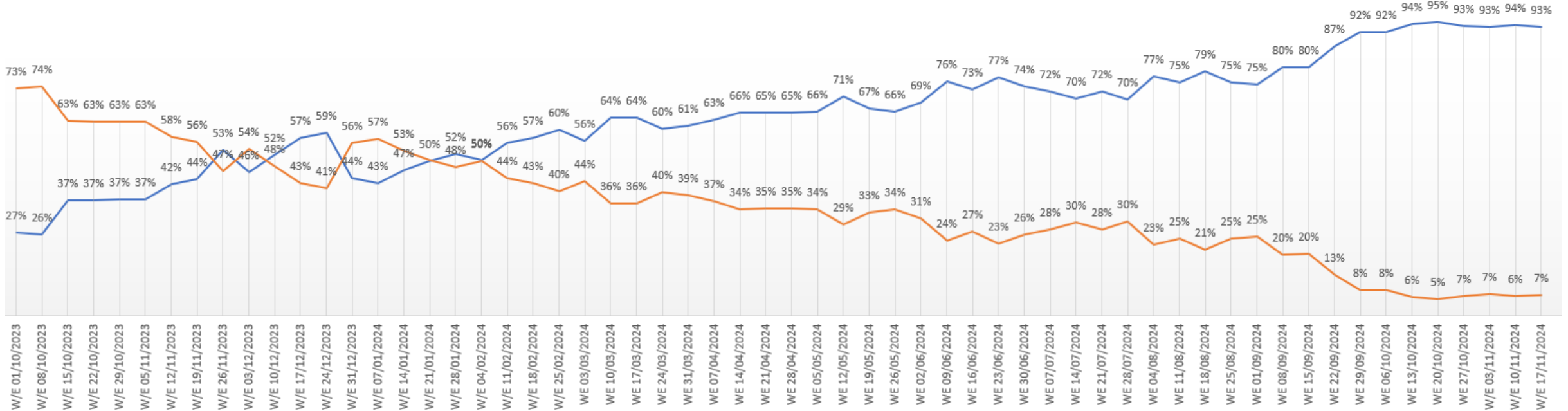
KPI's outstanding over 31 days – Oct 2023 to 17th Nov 2024

KPI Cases Outstanding 31+ Days

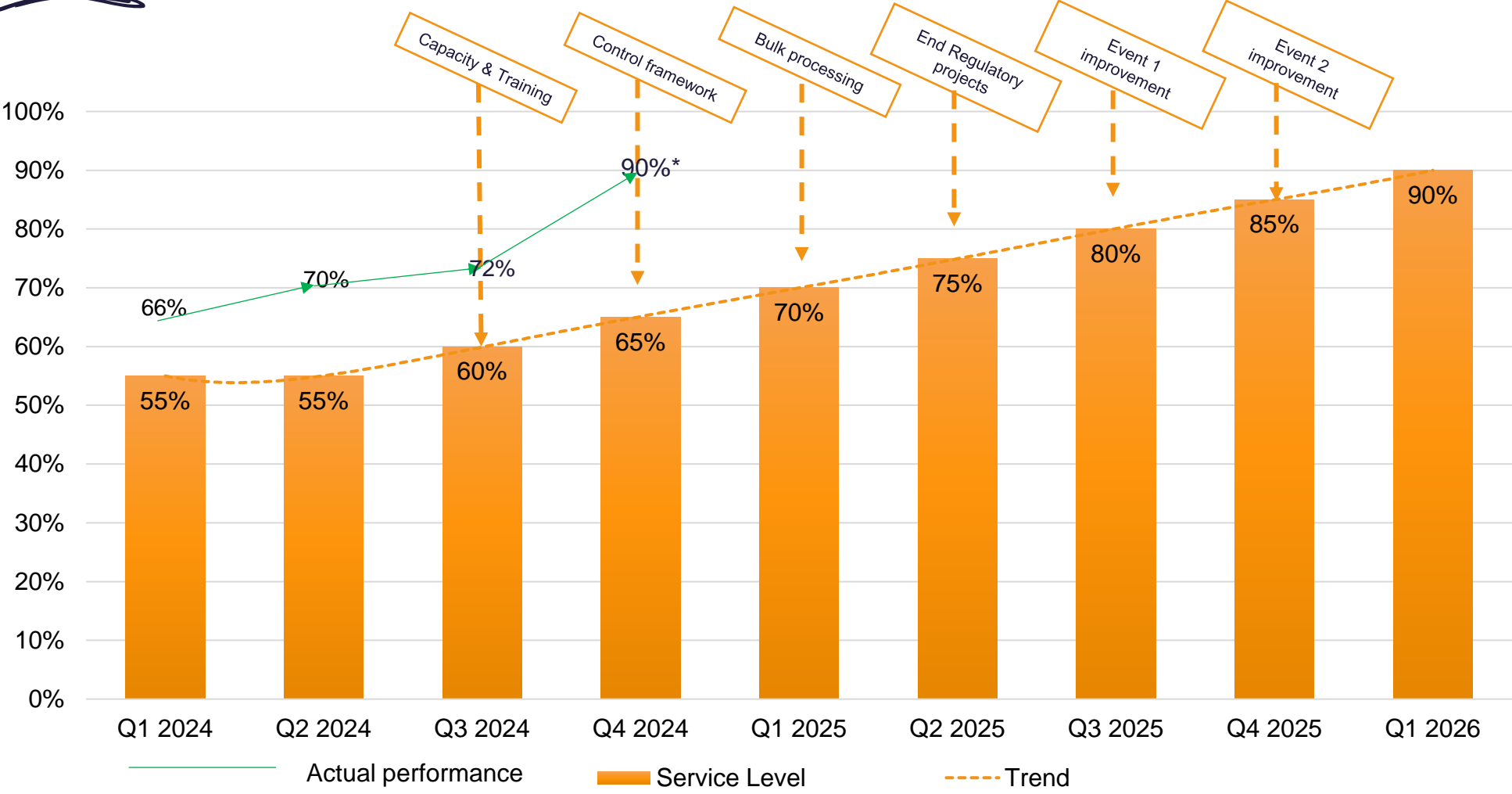


KPI's case by age % - Oct 2023 to 17th Nov 2024

Outstanding KPI Tasks by Age %



Service performance – plan v's actual – 17th Nov 24



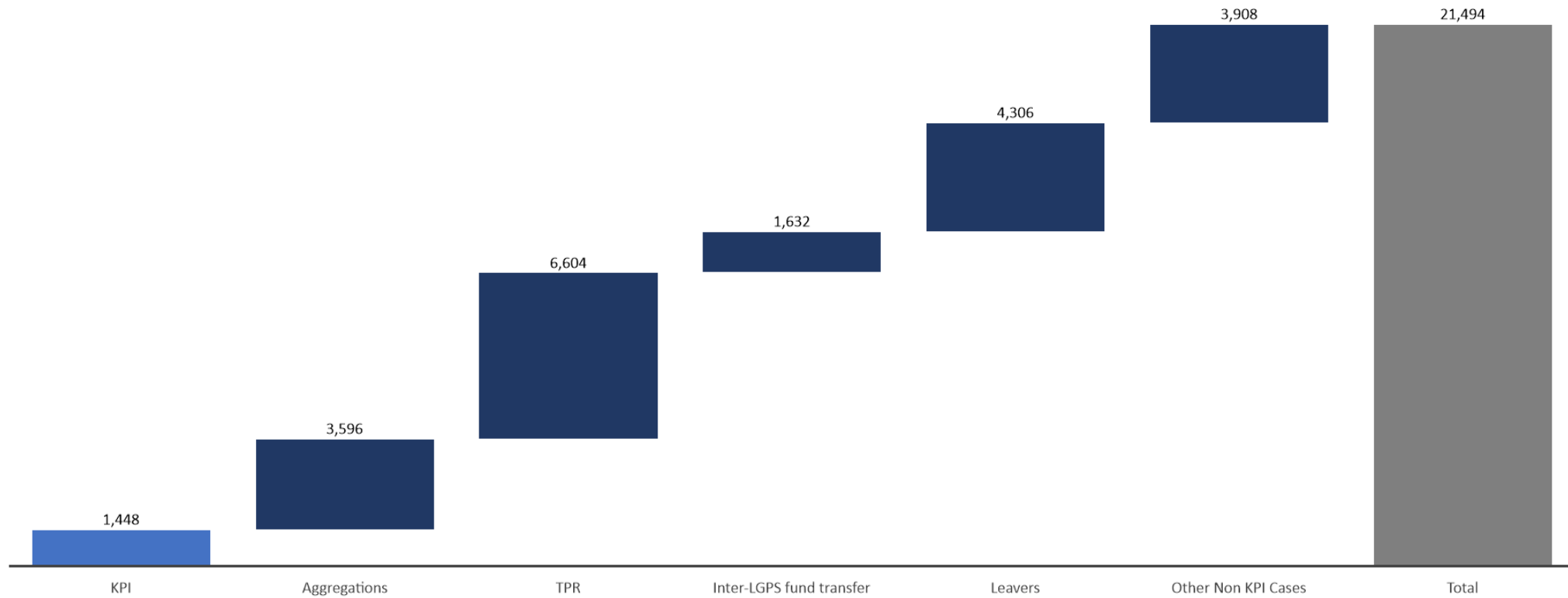
* Current Q4 as at 17th Nov 24

Non KPI workload



All outstanding cases – 17th Nov 2024

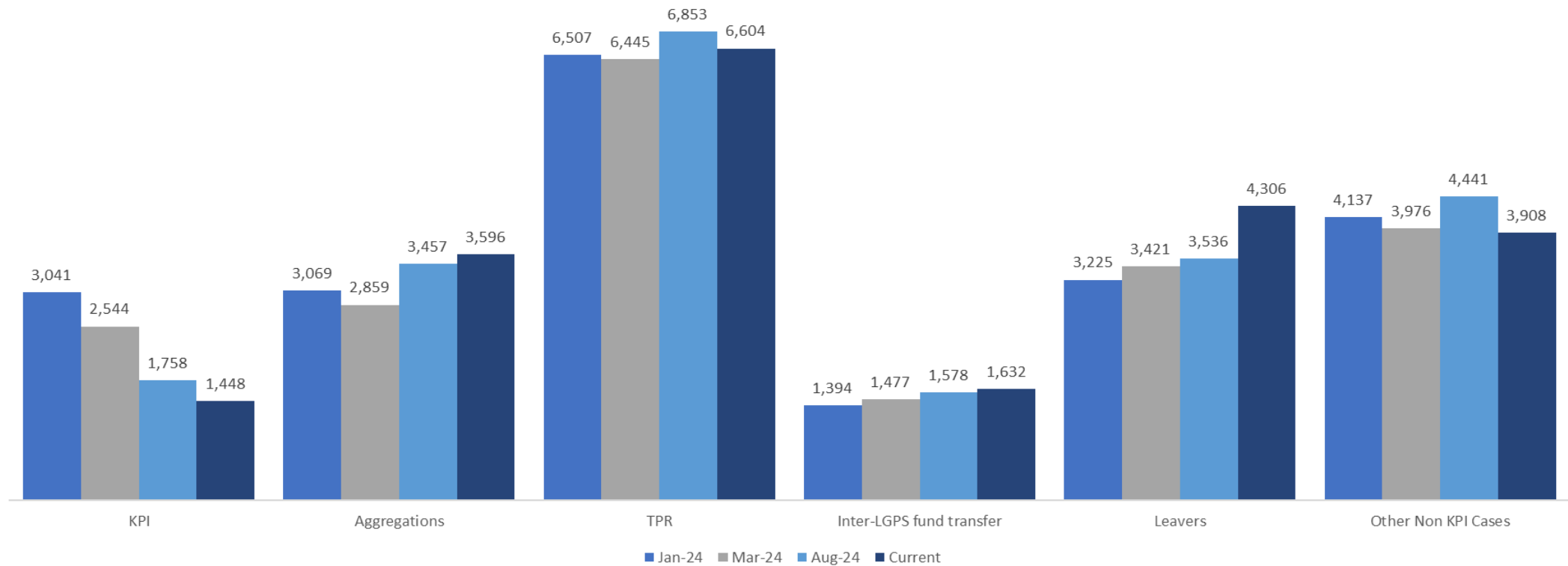
Outstanding Cases as at 17th Nov-24



All outstanding cases by type comparison Jan 24 – 17th Nov 24



Outstanding Cases Comparison



Priorities for 2025



- Complete procurement for main Pensions Administration System (PAS) inc Pensions Dashboard
- Implement Hosting of PAS
- Implement Pensions Dashboard
- Implement new member portal – Engage
- McCloud remedy
- GMP project reconciliation
- Controls review

Thank you



If you have any questions please contact:

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Your pension, your future