

Administration Update January 2025

Claire Newbery

Pensions Operations Manager



Agenda



- KPI & Non KPI update
- Strategic Roadmap 2025/26
 - 2024 highlights
 - 2025/26 Priorities
- Business Change



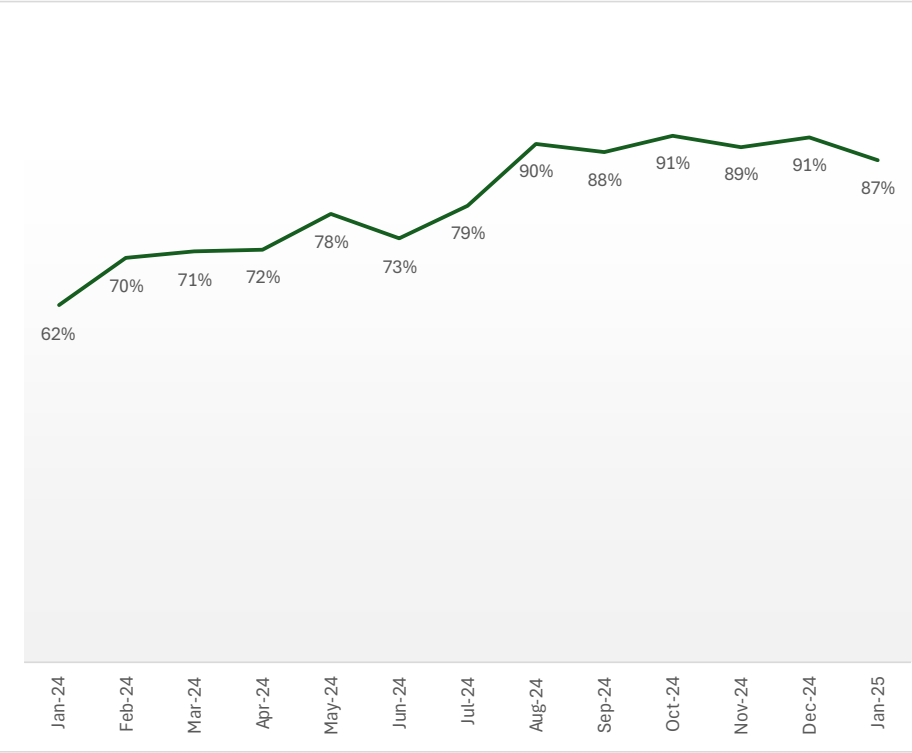
KPI's



SLA monthly performance average Jan 2024 to January 2025

Average SLA Performance

*Based on weekly KPI data



KPI Category	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Sep-24	Oct-24	Nov-24	Dec-24	Jan-25	Cases Created Jun-23 to Jan-25
Death Notification	57%	20%	62%	46%	31%	65%	65%	84%	79%	94%	94%	88%	100%	991
Death - Act/Def/Pen - Payment	76%	68%	88%	100%	69%	88%	93%	100%	73%	68%	94%	68%	82%	764
Retirement (Active) - Quote	32%	37%	30%	31%	30%	35%	52%	81%	85%	84%	60%	86%	46%	2,801
Retirement (Active) - Actual	77%	76%	95%	95%	77%	47%	78%	91%	94%	99%	97%	97%	94%	1,782
Retirement (Deferred) - Quote	17%	30%	35%	36%	57%	60%	91%	83%	89%	88%	98%	96%	74%	3,544
Retirement (Deferred) - Actual	52%	33%	82%	75%	66%	40%	68%	98%	96%	91%	99%	99%	99%	2,436
Divorce - Quote	39%	78%	49%	59%	66%	66%	83%	100%	100%	92%	100%	100%	100%	402
Divorce - Actual	100%	N/A	N/A	N/A	N/A	N/A	100%	100%	100%	100%	33%	0%	N/A	19
Refund - Quotes	31%	66%	68%	22%	77%	69%	34%	88%	88%	75%	88%	66%	73%	4,857
Refund - Actual	12%	31%	13%	84%	85%	65%	78%	88%	91%	95%	85%	82%	67%	1,510
Deferred Benefits	35%	50%	28%	62%	67%	62%	80%	79%	61%	96%	77%	95%	93%	4,649
Transfer In (Active) - Quote	20%	17%	26%	3%	6%	13%	17%	74%	85%	92%	59%	57%	97%	713
Transfer In (Active) - Actual	0%	29%	64%	100%	33%	56%	27%	56%	67%	48%	51%	79%	0%	283
Transfer Out (Active/Deferred) - Quote	14%	17%	1%	16%	14%	4%	30%	26%	17%	42%	12%	47%	36%	1,828
Transfer Out (Active/Deferred) - Actual	100%	100%	100%	73%	100%	100%	94%	100%	100%	100%	100%	100%	100%	197
Employer Estimate - Quote	93%	89%	77%	65%	100%	36%	94%	78%	95%	94%	92%	81%	95%	351
Member Estimate - Quote	94%	99%	81%	66%	94%	50%	85%	93%	90%	87%	99%	100%	92%	1,054
Joiner	93%	100%	100%	100%	100%	100%	99%	100%	100%	100%	100%	100%	100%	21,740
Weighted Average	62%	70%	71%	72%	78%	73%	79%	90%	88%	91%	89%	91%	87%	

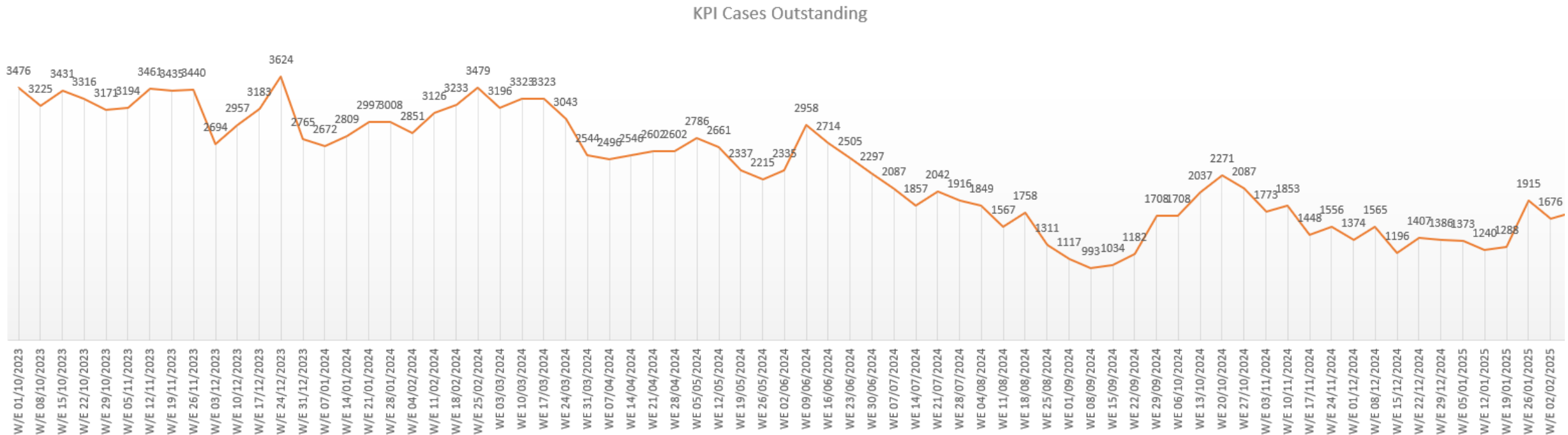
KPI cases completed January 2025

(cases numbers v target – cumulative % processed)

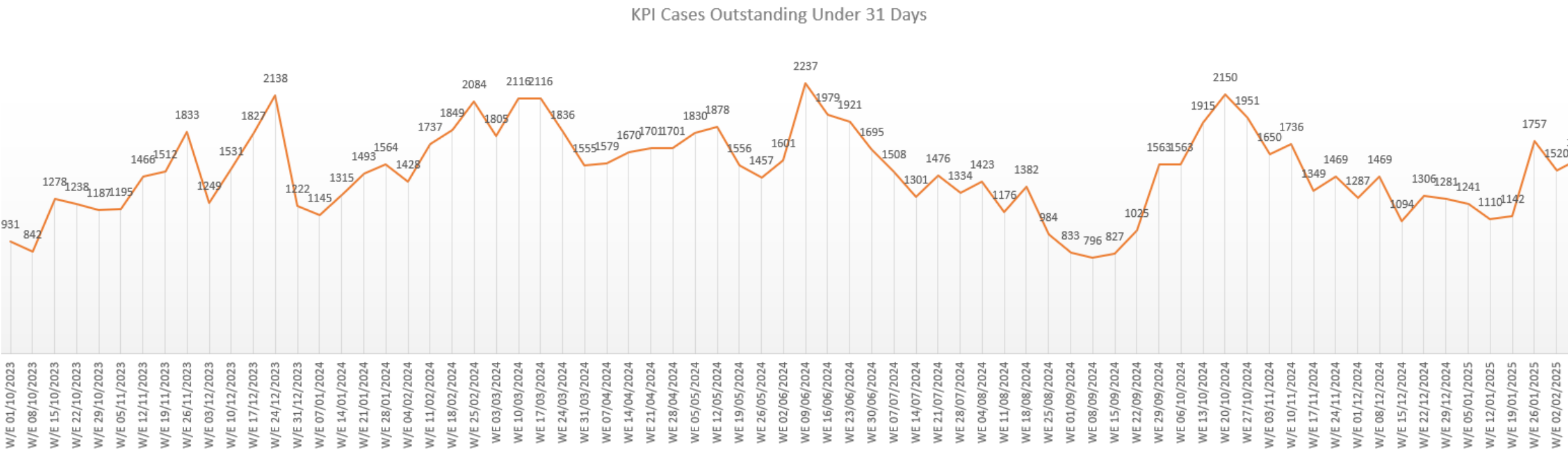


		01/01/2025 to 31/01/2025									
		Actual Days to Process									
		0 to 5	6 to 10	11 to 15	16 to 20	21 to 25	26 to 30	31 to 40	41 to 45	46 to 59	60+
Death Notification	5 Days	100%									
Death - Act/Def/Pen - Payment	10 Days	71%	83%	90%	94%	96%	98%	98%	100%		
Retirement (Active) - Quote	15 Days	20%	28%	46%	69%	86%	93%	93%	93%	93%	100%
Retirement (Active) - Actual	15 Days	47%	88%	98%	98%	98%	98%	100%			
Retirement (Deferred) - Quote	30 Days	5%	8%	22%	55%	68%	78%	91%	91%	93%	100%
Retirement (Deferred) - Actual	15 Days	56%	83%	98%	100%						
Divorce - Quote	45 Days	31%	38%	54%	100%						
Divorce - Actual	15 Days										
Refund - Quotes	10 Days	36%	85%	98%	99%	99%	99%	99%	99%	99%	100%
Refund - Actual	10 Days	16%	50%	94%	96%	100%					
Deferred Benefits	30 Days	61%	68%	74%	84%	85%	91%	96%	98%	99%	100%
Transfer In (Active) - Quote	10 Days	67%	96%	96%	100%						
Transfer In (Active) - Actual	10 Days	25%	25%	30%	40%	65%	85%	95%	100%		
Transfer Out (Active/Deferred) - Quote	10 Days	5%	33%	48%	71%	81%	81%	86%	90%	90%	100%
Transfer Out (Active/Deferred) - Actual	10 Days	100%									
Employer Estimate - Quote	15 Days	88%	90%	93%	100%						
Member Estimate - Quote	15 Days	45%	65%	88%	93%	95%	98%	98%	98%	100%	
Joiner	40 Days	7%	8%	9%	89%	100%					

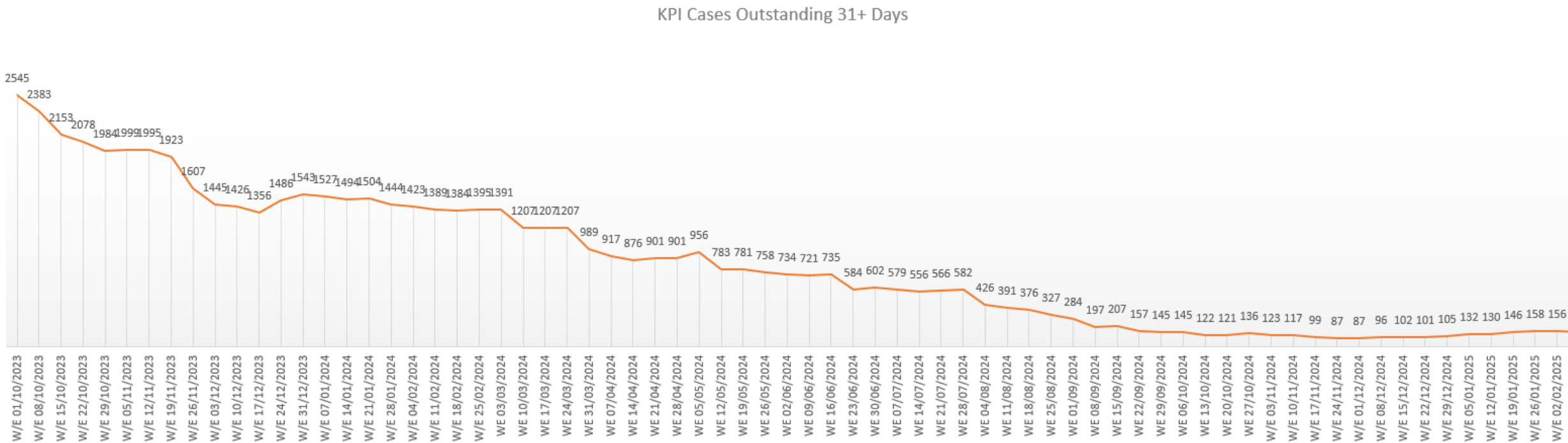
Total KPI's outstanding – Oct 2023 to Feb 2025



KPI cases outstanding under 31 days – Oct 2023 – Feb 2025

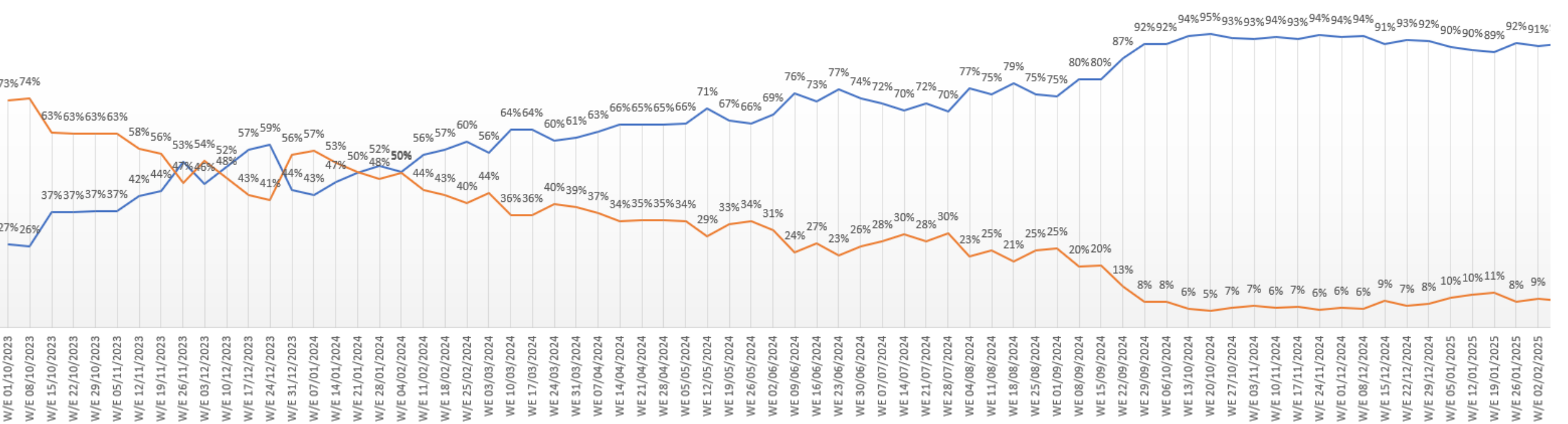


KPI's outstanding over 31 days – Oct 2023 to Feb 2025

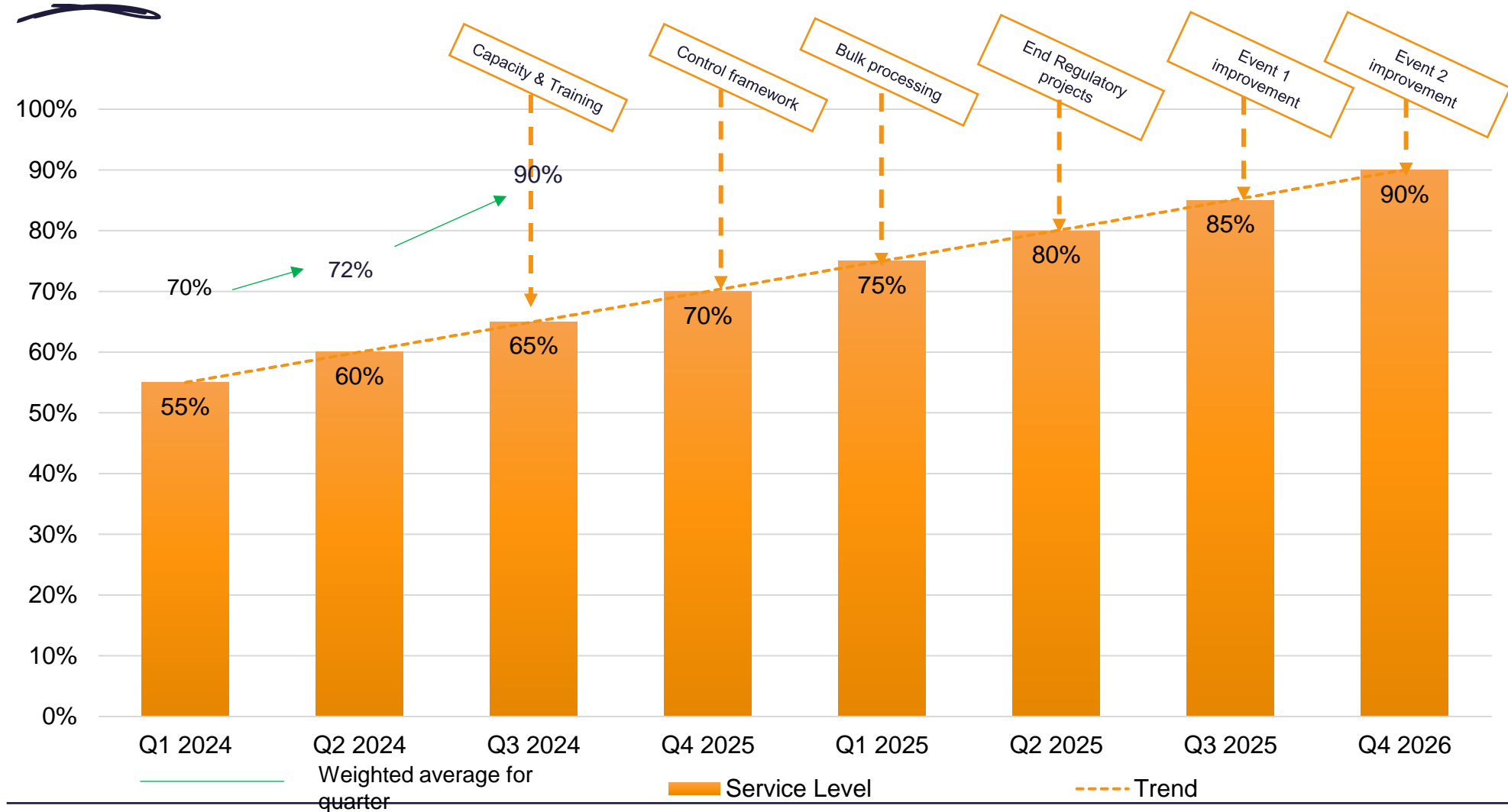


KPI's case by age % - Oct 2023 to Feb 2025

Outstanding KPI Tasks by Age %



Service performance – plan v's actual – 2nd Feb 2025

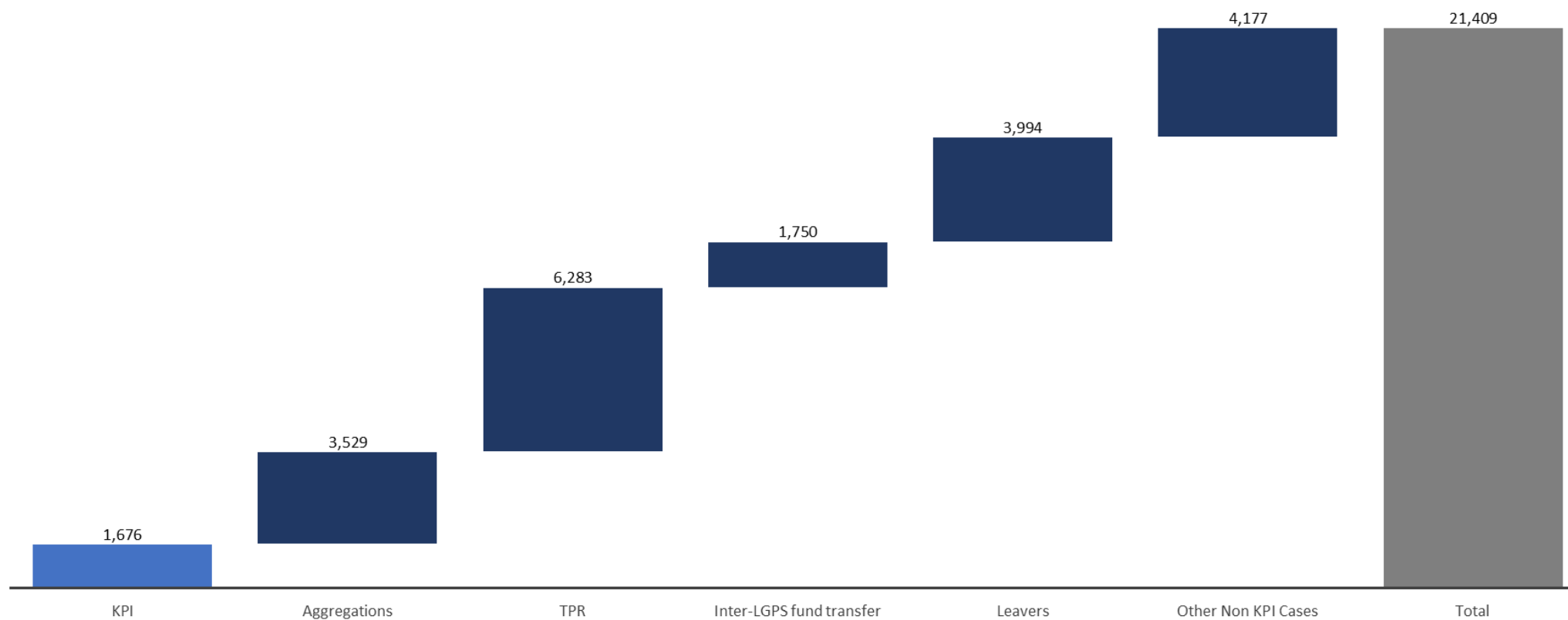


Non KPI workload

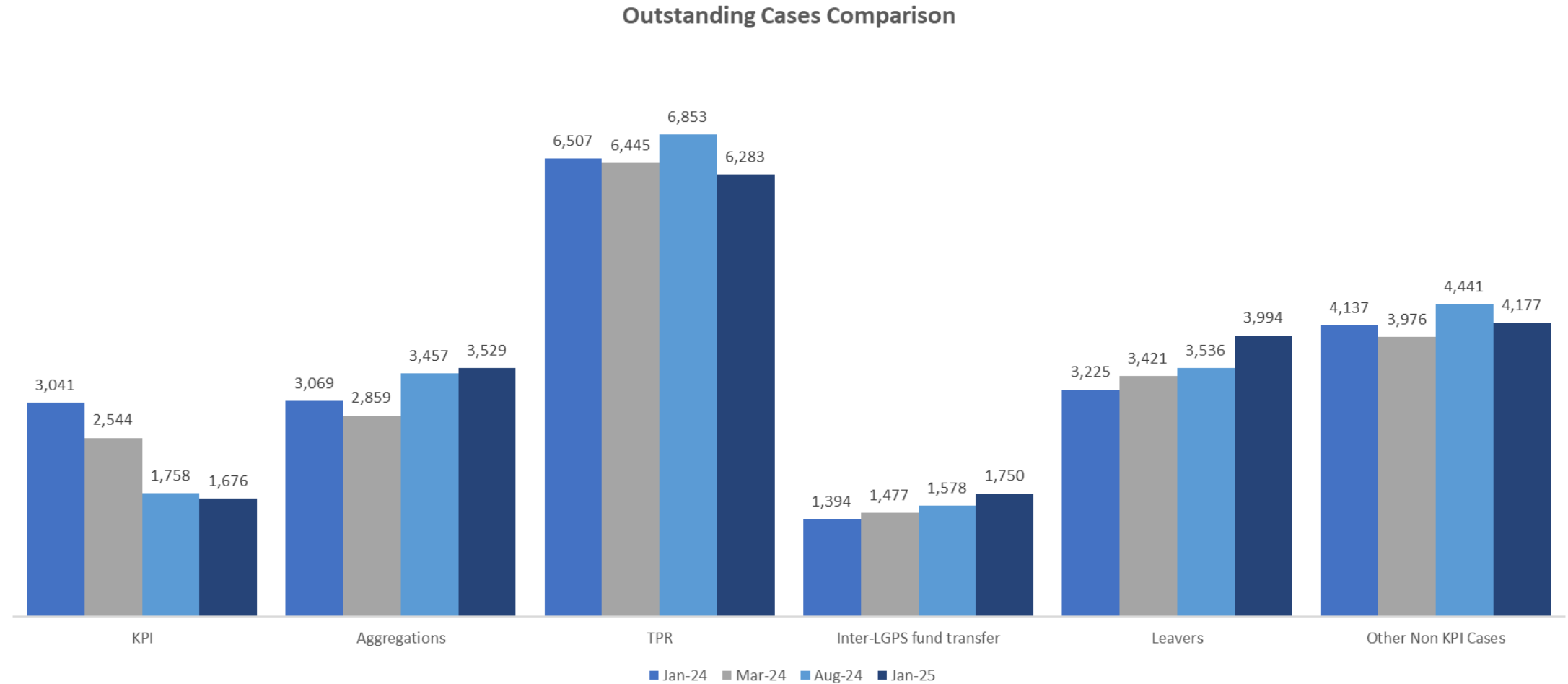


All outstanding cases – January 2025

Outstanding Cases as at Jan-25



All outstanding cases by type comparison Jan 24 – Jan 25







Strategic Roadmap & Business Change 2025-26

Claire Newbery
Pensions Operations Manager

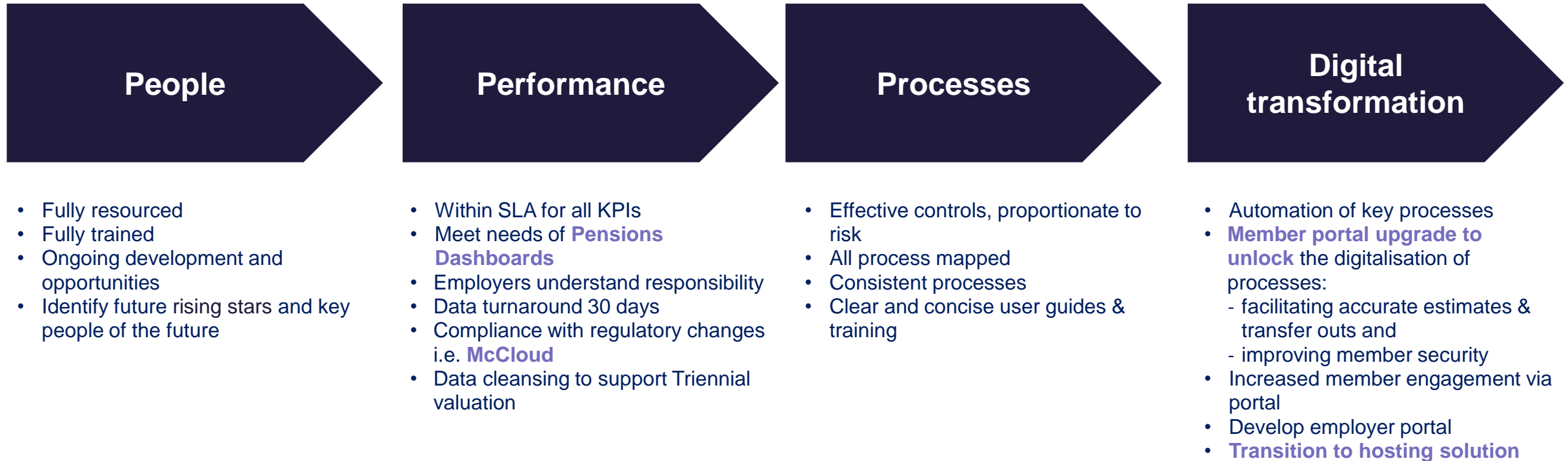
Anne Black
Business Change Manager



2024 / 2025 – Highlights and Achievements

People	Performance	Process	Digitalisation
<ul style="list-style-type: none">• Restructure done• Introduction of 2 Mental Health first aiders• 16 New starters• 24 Promotions within existing team• Creation of Business Change function	<ul style="list-style-type: none">• Pension Increase project complete• Backlog reduction of KPIs• 39 new employers onboarded to the fund• Webinar based training introduced for scheme employers• KPI data demonstrating that we are now hitting SLAs targets	<ul style="list-style-type: none">• All employers now on i-Connect• Development of internal dashboard to manage year end data• Policy approvals<ul style="list-style-type: none">- GMP- Unders and overs• 12 high risk process controls reviewed and updated	<ul style="list-style-type: none">• i-Connect Document portal live• New Employer website live• New employer webforms introduced to improve data submissions• Bank Account Validation implemented
Complete 	Excellent Progress 	Improvements started 	Improvements started 

2025 and beyond, Priorities & Objectives



2025 – Business Change



Change supporting service

Established in late 2024, the APF Business Change function is dedicated to managing change effectively by delivering projects or providing project best practice guidance. The function encompasses project management, business analysis, website development and communications. The team works with other APF teams balancing resource to fulfil regulatory requirements and to manage BAU alongside change.

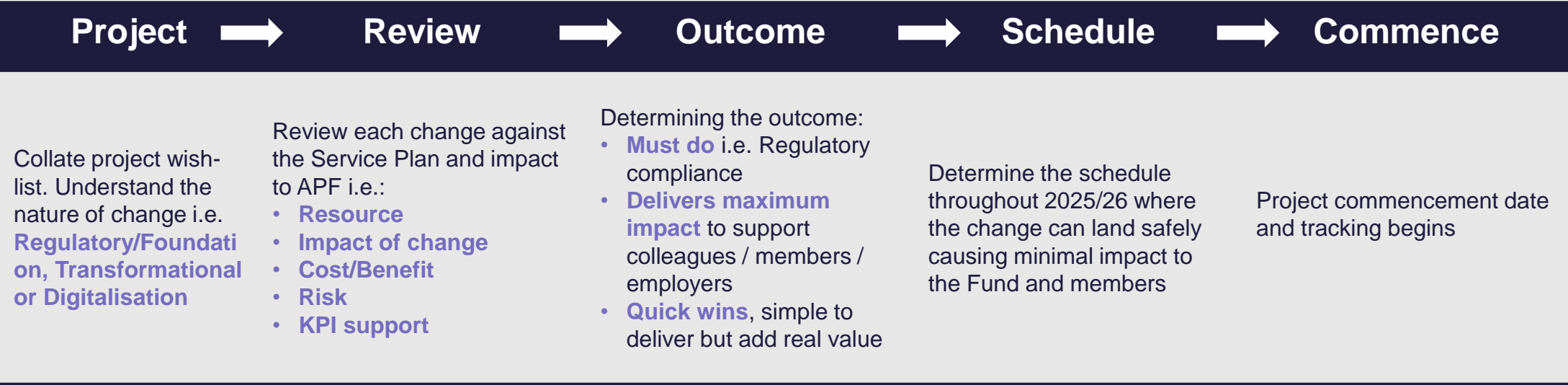
Key Focus Areas for the teams in 2025/26 are **Member engagement, McCloud & Dashboard compliance and Procurement**.: We will progress Transformation and Digitalisation where resource allows. Each project below aligns with strategic objectives and will be carefully planned and monitored to ensure timely delivery and maintain high service levels.

	Annual Event	Regulatory Change/ Foundation	Dashboard	McCloud	Procurement	Transformation	Digitalisation
Summary	Our administration teams are dedicated to ensuring compliance with all regulatory requirements, providing transparency and accountability to our members.		Meeting the regulatory commitments to be ready for connection of dashboard in 2025	Ensure compliance and fairness for all members affected by the ruling. Embed updates in readiness for ABS run	In 2025-26, we will continue to refine our procurement processes to ensure value for money and compliance with legal requirements	Prioritise projects that drive innovation and enhance member experience. By embracing new technologies and methodologies	Develop understanding of digital solutions that exist within our administration system and those that compliment APF service
Activities*	<ul style="list-style-type: none"> Year end Valuation 3Yr Annual Benefit Statements Pension Savings Statements HMRC Event reporting 	<ul style="list-style-type: none"> GMP Remediation Bank Account Validation Tracing solution Process control overview 	<ul style="list-style-type: none"> Data Cleansing Backlog reduction Connection readiness ISP Connection Admin readiness Colleague training 	<ul style="list-style-type: none"> Other service Age 65 plus Teachers XS McCloud remedy 	<ul style="list-style-type: none"> ISP Administration system & hosting Printing solutions Web hosting 	<ul style="list-style-type: none"> Utilisation of new administration tools i.e. automated workflows New member onboarding Bulk processing 	<ul style="list-style-type: none"> Email improvements Enhanced Admin to Pay Digital footprint Process Automation Paperless Create self-serve i.e. Engage
APF Resource	<ul style="list-style-type: none"> Admin Teams QA Investments 	<ul style="list-style-type: none"> Admin Teams QA 	<ul style="list-style-type: none"> Admin Teams Financial Systems ISP provider and admin system support 	<ul style="list-style-type: none"> QA Admin 	<ul style="list-style-type: none"> All teams providing input 	<ul style="list-style-type: none"> Web Development Business Analysis Admin 	<ul style="list-style-type: none"> All teams

Prioritisation process

Business Change works with other APF teams to prioritise projects. We continually review our projects, evaluating them to ensure they continue to deliver the right benefits to our members and administration teams. By carefully managing our resources, we can maximise the impact of our efforts and achieve our objectives efficiently.

The change agenda is extremely busy, however with the balancing of resource to support change, impact, cost benefit, risk and supporting the KPIs will drive this prioritisation. In addition to this, the team's capacity to absorb the changes to ensure the risks are mitigated.



Thank you



If you have any questions please contact:

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Anne Black

Business Change Manager

Avon
Pension
Fund



Your pension, your future