

Bath & North East Somerset Council	
MEETING:	LOCAL PENSION BOARD OF AVON PENSION FUND
MEETING DATE:	3 rd December 2025
TITLE:	Administration Performance report
WARD:	ALL
AN OPEN PUBLIC ITEM	
List of attachments to this report: Appendix 1 – Administration Update Appendix 2 – draft AFP Data Improvement Plan Appendix 3 – TPR data improvement report	

1 THE ISSUE

- 1.1 The purpose of this report is to present the fund administration performance for the period up to and including 31st October 2025 v's key performance indicators (KPI's).
- 1.2 Review the Fund's revised Data Improvement Plan.

2 RECOMMENDATIONS

The Pension Board is asked to;

- 2.1 Note the service performance to the period ending 31st October 2025.
- 2.2 Review the new Data Improvement Plan

3 THE REPORT

- 3.1 Service - Appendix 1 includes details of the Fund's current service levels for KPIs, status 2 backlog and current projects affecting administration. The Fund has seen a predicted peak in work levels in September which is linked to end of term school leavers of non-teaching staff.
- 3.2 APF Data Improvement Plan - Part of the TPR General Code of Practice requires funds to have a data improvement plan (DIP). Appendix 2 is the new draft DIP which outlines how we maintain both common and scheme specific data. The board is asked to review and comment on the plan.
- 3.3 Recruitment - Due to staff changes and internal recruitment, the administration have a total of 4 FTE's vacant posts. Recruitment is ongoing.
- 3.4 Pensions Administration Strategy – Following approval by Committee in September, a consultation with employers began on 7th November and will end on 31st January 2026. Initial feedback from employers has been positive.

- 3.5 Supplementary Pensions Increase – has been paid in the November payroll run. 1238 members will receive an additional one off payment, ranging from £0.08 to £2,201.
- 3.6 Pensions Dashboard - The Fund successfully connect to the Pensions Dashboard along with its two AVC providers and is compliant with current regulations. Work is now ongoing to maintain compliance with the dashboard. An update on next steps will be given to the board at the meeting.
- 3.7 Access & Protections Consultation – on 13th October, the government launched a new consultation. The consultation closes on 22nd December and covers the following areas:
- Normal minimum pension age
 - Pension access for councillors and mayors
 - Academies in the LGPS
 - New Fair Deal
- 3.8 Oasis direction order – on 16th October the Fund received notification that MHCLG have approved the original application made by Oasis in 2021. The order approves the consolidation of 53 academies and associated admitted bodies to LPFA. APF have 10 academies and 1 admitted body covering approximately 1500 member including active, deferred and pensioner members. This change will create significant additional workload and expense for the Fund for which we will seek recovery from Oasis and have this agreed in the final direction order.
- 3.9 Statutory Annual requirements :
- Year end data returns – we saw a marked improvement in the quality of data received from employers with fewer fines being issued. Please see Appendix 1 for further details.
 - The annual benefit statement (ABS) exercise saw additional complications this year due to new regulatory requirements to communicate the McCloud underpin to members. A total of 94.5% of active & deferred members were issued an ABS within the regulatory deadline of 31st August. Please refer to Appendix 1 for a breakdown of cases.
 - 18 members were issued a pension saving statement (PSS) before the regulatory deadline of 6th October, achieving 100% compliance.

4 STATUTORY CONSIDERATIONS

- 4.1 Bath and North East Somerset Council, in its role as administering authority, has executive responsibility for the Avon Pension Fund. The Council delegates its responsibility for administering the Fund to the Avon Pension Fund Committee which is the formal decision-making body for the Fund.
- 4.2 The Pension Board has an advisory role in assisting the administering authority by making recommendations about compliance, process and governance. The Board does not have a decision-making role.

5 RESOURCE IMPLICATIONS (FINANCE, PROPERTY, PEOPLE)

- 5.1 People resource could be affected by the Consultation and Oasis direction order.

6 RISK MANAGEMENT

- 6.1 An effective governance structure, defining clear responsibilities, and ensuring that the decision making body has an adequate level of knowledge and access to expert advice, is a key aspect of the risk management process.

7 EQUALITIES STATEMENT

- 7.1 A proportionate equalities impact assessment has been carried out using corporate guidelines and no significant issues have been identified.

8 CLIMATE CHANGE

- 8.1 The Fund is implementing a digital strategy across all its operations and communications with stakeholders to reduce its internal carbon footprint in line with the Council's Climate Strategy. The Fund acknowledges the financial risk to its assets from climate change and addresses this through its strategic asset allocation to Paris Aligned Global Equities, Sustainable Equities and renewable energy opportunities. The strategy is monitored and reviewed by the Committee.

9 OTHER OPTIONS CONSIDERED

- 9.1 None.

10 CONSULTATION

- 10.1 The Report and its contents have been discussed with the Head of Pensions representing the Avon Pension Fund and the Director of Financial Services, Assurance & Pensions representing the administering authority.

Contact person	Claire Newbery Pensions Operations Manager 01225 394701
Background papers	none
Please contact the report author if you need to access this report in an alternative format.	