

<b>Bath &amp; North East Somerset Council</b>	
MEETING:	<b>LOCAL PENSION BOARD OF AVON PENSION FUND</b>
MEETING DATE:	11/03/2026
TITLE:	Administration Performance Report
WARD:	<b>ALL</b>
<b>AN OPEN PUBLIC ITEM</b>	
<p>List of attachments to this report:</p> <p>Appendix 01 – Administration update</p> <p>Appendix 02 - Data Improvement Plan</p> <p>Appendix 03 - TPR data improvement report</p>	

## **1 THE ISSUE**

- 1.1 The purpose of this report is to present the fund administration performance for the period up to and including 31<sup>st</sup> January 2026 v's key performance indicators (KPI's).
- 1.2 Review and approve the funds Data Improvement Plan (DIP).

## **2 RECOMMENDATIONS**

### **The Pension Board is asked to;**

- 2.1 Note the service performance to the period ending 31<sup>st</sup> January 2026.
- 2.2 Approve the Data Improvement Plan

## **3 THE REPORT**

- 3.1 Performance - Appendix 1 includes details of the Fund's current service levels for KPIs and status 2 backlog.
- 3.2 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 DIP which outlines how we maintain both common and scheme specific data. The board is asked to review and approve the plan.
- 3.3 Appendix 3 – is the funds report on data improvement in line with our data improvement plan. A small increase in cases can be seen, this is primarily due to the annual benefit statement exercise which triggers the return of post due to “gone aways” and the introduction of the data cleansing tool within Altair which has raised new data queries for the fund.
- 3.4 Recruitment – The administration currently have 4.8 FTE vacancies across the administration spread across multiple teams.
- 3.5 3 officers have recently passed the 2<sup>nd</sup> exam towards the LGA qualification.

#### **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 None.

#### **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.

<b>Contact person</b>	Claire Newbery Pensions Operations Manager 01225 394701
<b>Background papers</b>	None

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