

Administration Update 11th March 2026

Claire Newbery

Pensions Operations Manager



Avon
Pension
Fund



Your pension, your future

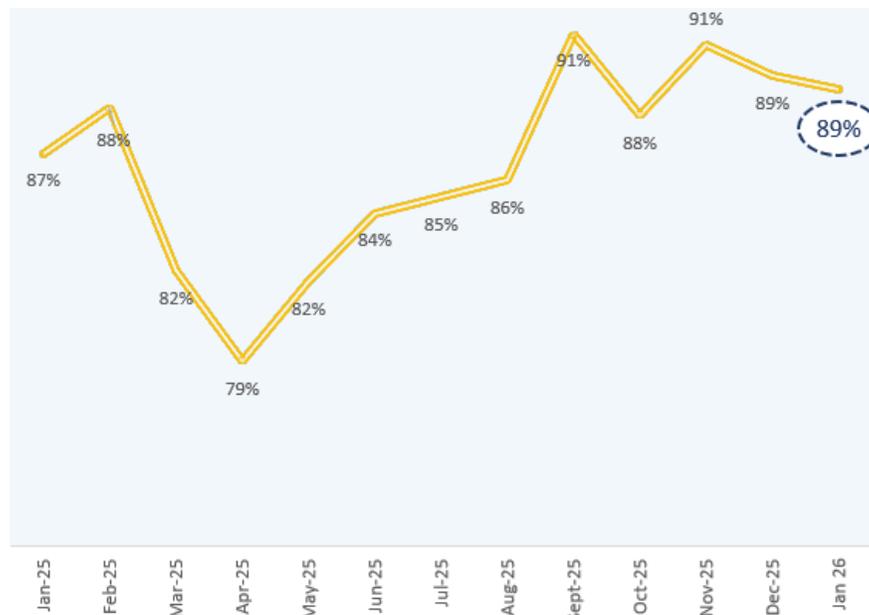
KPI's



SLA monthly performance average January 2025 to January 2026

Average SLA Performance

*Based on weekly KPI data



KPI Category	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sept-25	Oct-25	Nov-25	Dec-25	Jan 26	Cases Created Jan-24 to Jan-26
Death Notification	100.0%	93.8%	63.8%	71.0%	76.7%	90.6%	97.0%	98.2%	94.8%	98.7%	92.9%	97.2%	97.8%	1,261
Death - Act/Def/Pen - Payment	81.6%	65.3%	59.9%	49.2%	60.3%	52.6%	70.4%	70.9%	51.4%	55.6%	53.1%	86.6%	64.1%	941
Retirement (Active) - Quote	45.5%	83.5%	77.7%	80.4%	69.7%	61.7%	76.8%	89.9%	85.0%	79.9%	79.8%	87.8%	83.9%	2,903
Retirement (Active) - Actual	94.4%	90.1%	83.5%	69.4%	78.5%	80.8%	97.0%	92.1%	90.6%	93.5%	90.9%	88.6%	91.4%	2,036
Retirement (Deferred) - Quote	73.8%	71.3%	57.0%	25.5%	72.3%	80.7%	68.7%	81.0%	93.5%	91.0%	82.4%	86.3%	92.2%	4,863
Retirement (Deferred) - Actual	99.0%	98.7%	77.0%	85.5%	77.4%	76.1%	88.5%	90.6%	90.9%	86.9%	86.8%	84.2%	95.9%	3,285
Divorce - Quote	100.0%	100.0%	100.0%	86.3%	95.5%	100.0%	96.4%	100.0%	96.9%	100.0%	100.0%	98.8%	100.0%	707
Divorce - Actual	N/A	0.0%	20											
Refund - Quotes	73.4%	93.3%	72.5%	52.5%	64.1%	67.3%	52.1%	36.1%	85.5%	84.2%	92.0%	70.7%	76.5%	5,809
Refund - Actual	66.7%	68.6%	61.1%	77.7%	39.3%	70.3%	94.8%	98.6%	100.0%	94.6%	100.0%	94.1%	91.1%	2,094
Deferred Benefits	92.6%	87.8%	86.0%	83.8%	84.6%	87.9%	97.8%	90.0%	90.8%	86.7%	94.6%	89.3%	87.7%	6,671
Transfer In (Active) - Quote	97.4%	93.9%	77.1%	60.0%	42.2%	64.9%	58.9%	44.7%	33.3%	95.5%	72.1%	100.0%	63.8%	789
Transfer In (Active) - Actual	0.0%	56.4%	50.0%	100.0%	63.9%	47.7%	78.6%	72.2%	83.3%	50.0%	83.3%	66.7%	75.0%	387
Transfer Out (Active/Deferred) - Quote	35.9%	2.8%	9.8%	30.4%	34.8%	27.2%	43.5%	46.4%	52.0%	8.8%	25.8%	40.0%	22.4%	2,542
Transfer Out (Active/Deferred) - Actual	100.0%	83.3%	100.0%	33.3%	100.0%	85.4%	100.0%	62.5%	77.8%	20.8%	66.7%	45.0%	41.0%	256
Employer Estimate - Quote	94.5%	100.0%	97.5%	92.0%	76.4%	86.4%	90.2%	91.7%	100.0%	91.7%	100.0%	83.3%	76.0%	499
Member Estimate - Quote	91.9%	97.5%	94.3%	96.3%	87.1%	100.0%	90.9%	77.2%	76.7%	60.8%	96.2%	95.0%	93.8%	1,592
Joiner	99.6%	100.0%	99.6%	99.8%	99.8%	100.0%	95.4%	100.0%	100.0%	100.0%	100.0%	100.0%	99.5%	24,598
Weighted Average	87%	88%	82%	79%	82%	84%	85%	86%	91%	88%	91%	89%	89%	

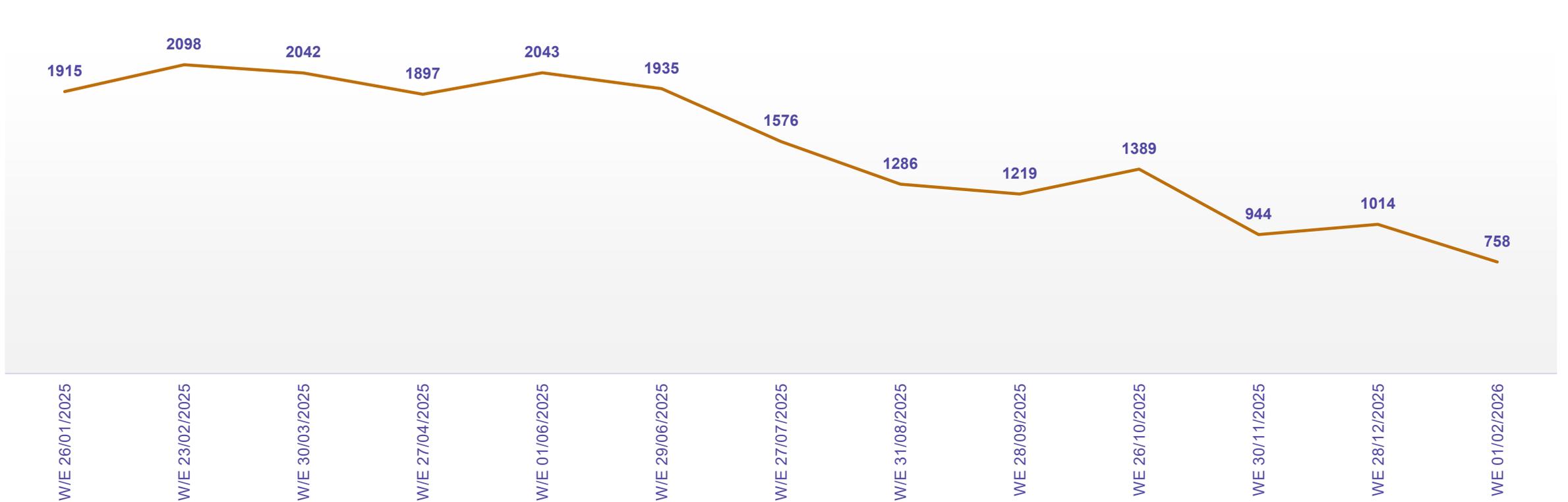
KPI cases completed Jan 2026

(cases numbers v target – cumulative % processed)

		Tasks Current Quarter									
		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	98%	100%								
Death - Act/Def/Pen - Payment	10 Days	52%	67%	82%	85%	91%	94%	97%	100%		
Retirement (Active) - Quote	15 Days	56%	71%	84%	87%	91%	95%	96%	96%	98%	100%
Retirement (Active) - Actual	15 Days	75%	81%	90%	94%	96%	97%	97%	99%	99%	100%
Retirement (Deferred) - Quote	30 Days	41%	44%	58%	69%	78%	89%	96%	99%	99%	100%
Retirement (Deferred) - Actual	15 Days	54%	80%	94%	97%	97%	98%	100%			
Divorce - Quote	45 Days	29%	55%	69%	83%	91%	95%	100%			
Divorce - Actual	15 Days							100%			
Refund - Quotes	10 Days	75%	83%	91%	95%	95%	97%	99%	99%	100%	
Refund - Actual	10 Days	46%	83%	96%	99%	100%					
Deferred Benefits	30 Days	60%	75%	80%	83%	90%	93%	96%	96%	98%	100%
Transfer In (Active) - Quote	10 Days	59%	81%	84%	88%	100%					
Transfer In (Active) - Actual	10 Days	73%	87%	93%	93%	93%	93%	100%			
Transfer Out (Active/Deferred) - Quote	10 Days	6%	23%	44%	69%	85%	92%	99%	100%		
Transfer Out (Active/Deferred) - Actual	10 Days	38%	46%	62%	65%	69%	69%	81%	92%	92%	100%
Employer Estimate - Quote	15 Days	80%	90%	90%	90%	90%	90%	100%			
Member Estimate - Quote	15 Days	71%	86%	92%	95%	97%	97%	100%			
Joiner	40 Days	33%	64%	89%	97%	100%					

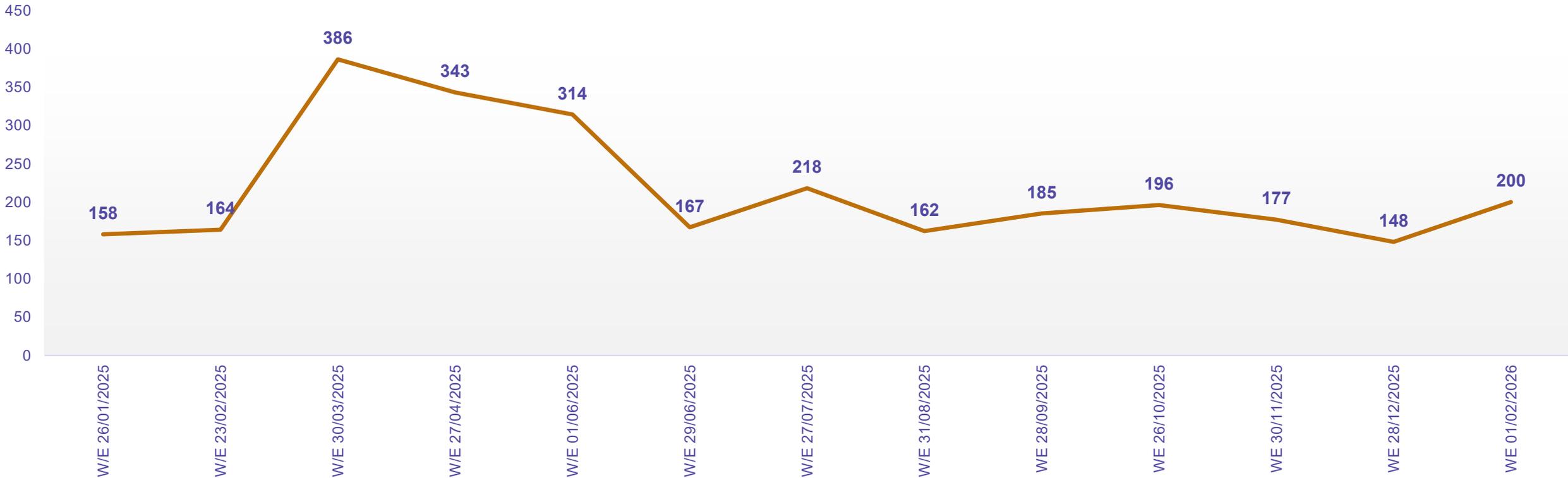
Total KPI's outstanding – Jan 2025 to Jan 2026

KPI Cases Outstanding



KPI's outstanding over 31 days – Jan 2025 to Jan 2026

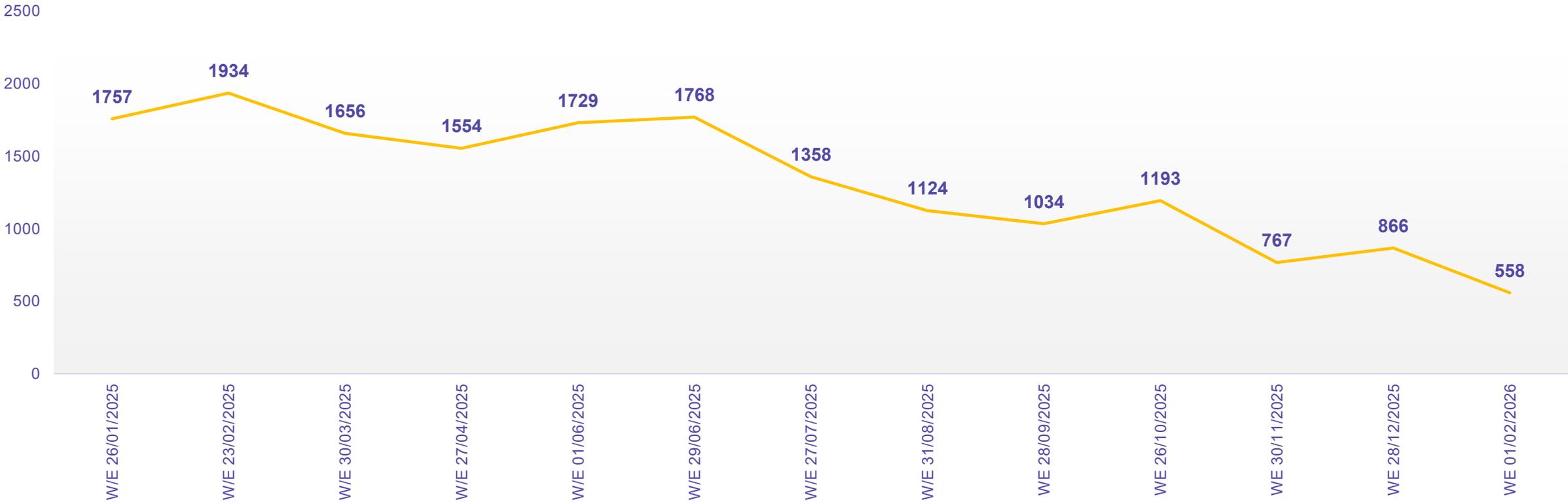
KPI Cases Outstanding 31+ Days



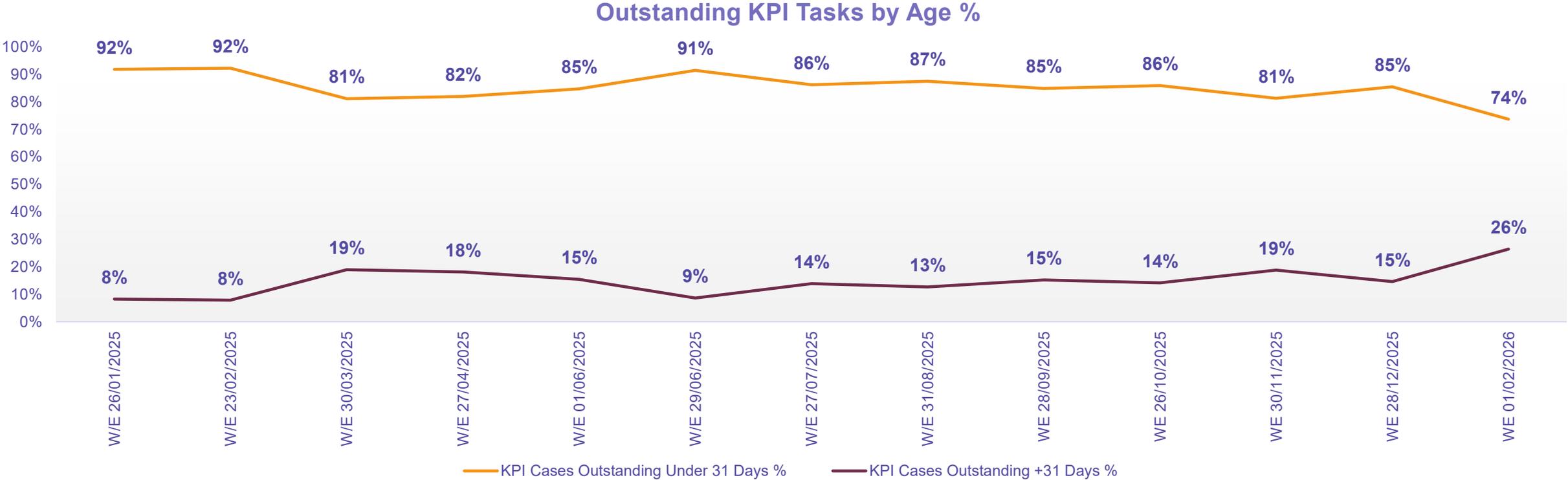
KPI cases outstanding under 31 days – Jan 2025 to Jan 2026



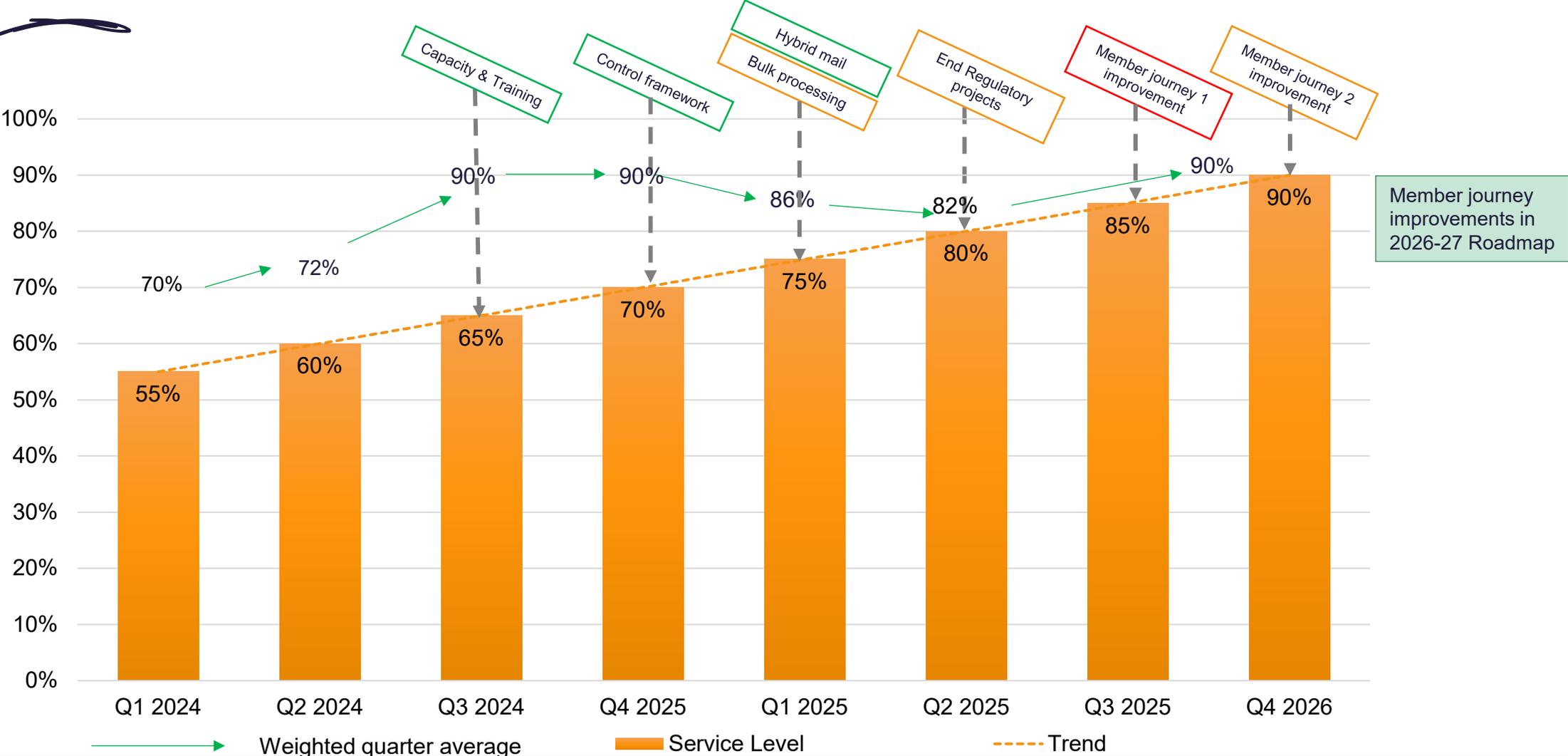
KPI Cases Outstanding Under 31 Days



KPI's case by age % - Jan 2025 to Jan 2026

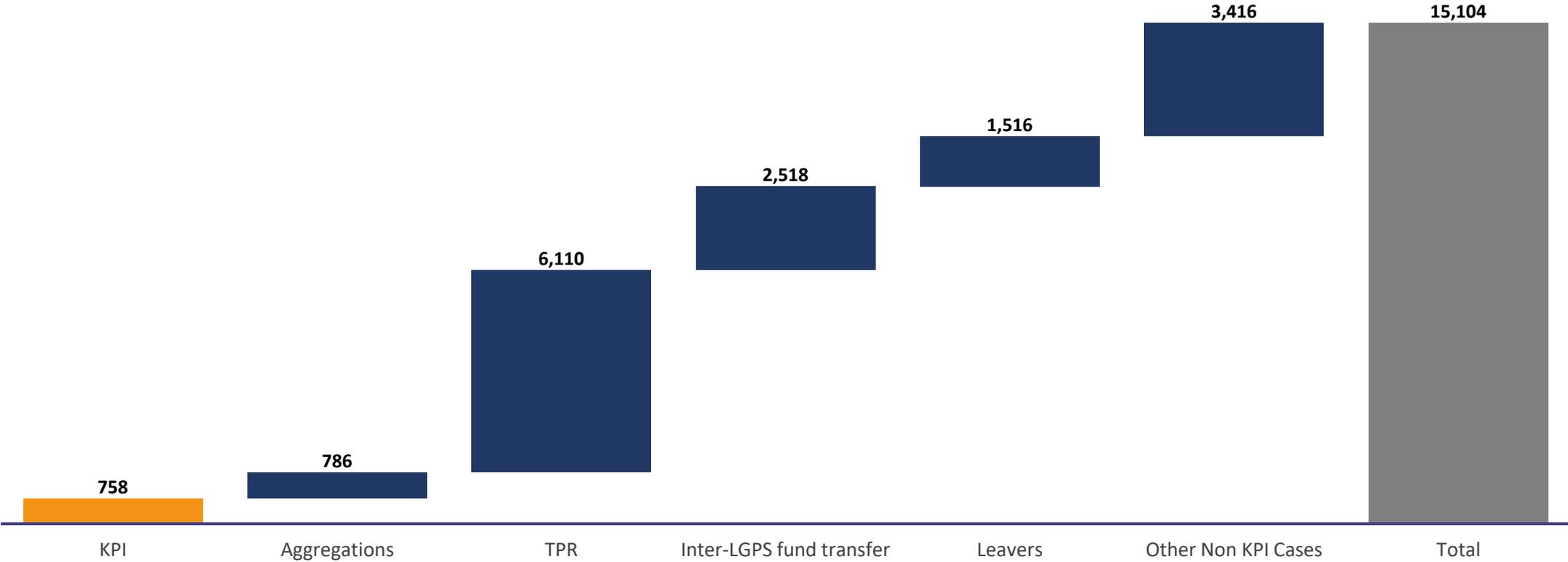


Service performance – plan vs. actual – Jan 2026



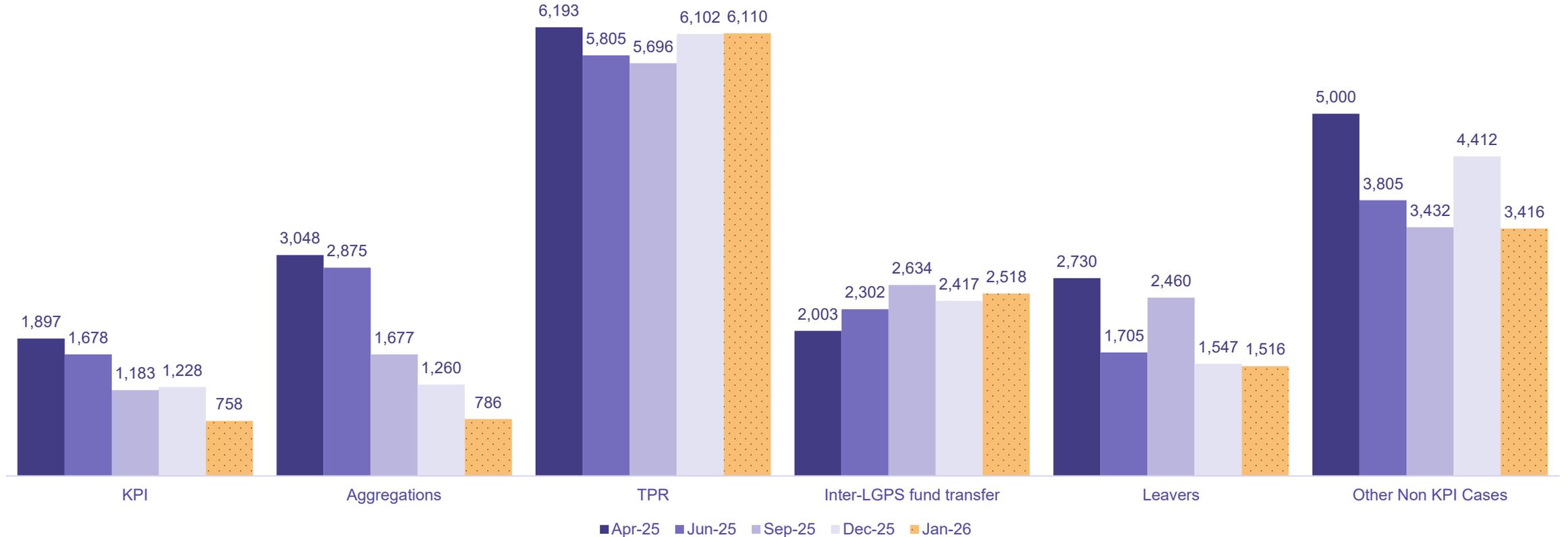
All outstanding cases – Jan 2026 (all operations teams) (KPI & Non KPI cases)

Outstanding Cases as at Jan-26



All outstanding cases by type comparison Apr 25 – Jan 26

Outstanding Cases Comparison



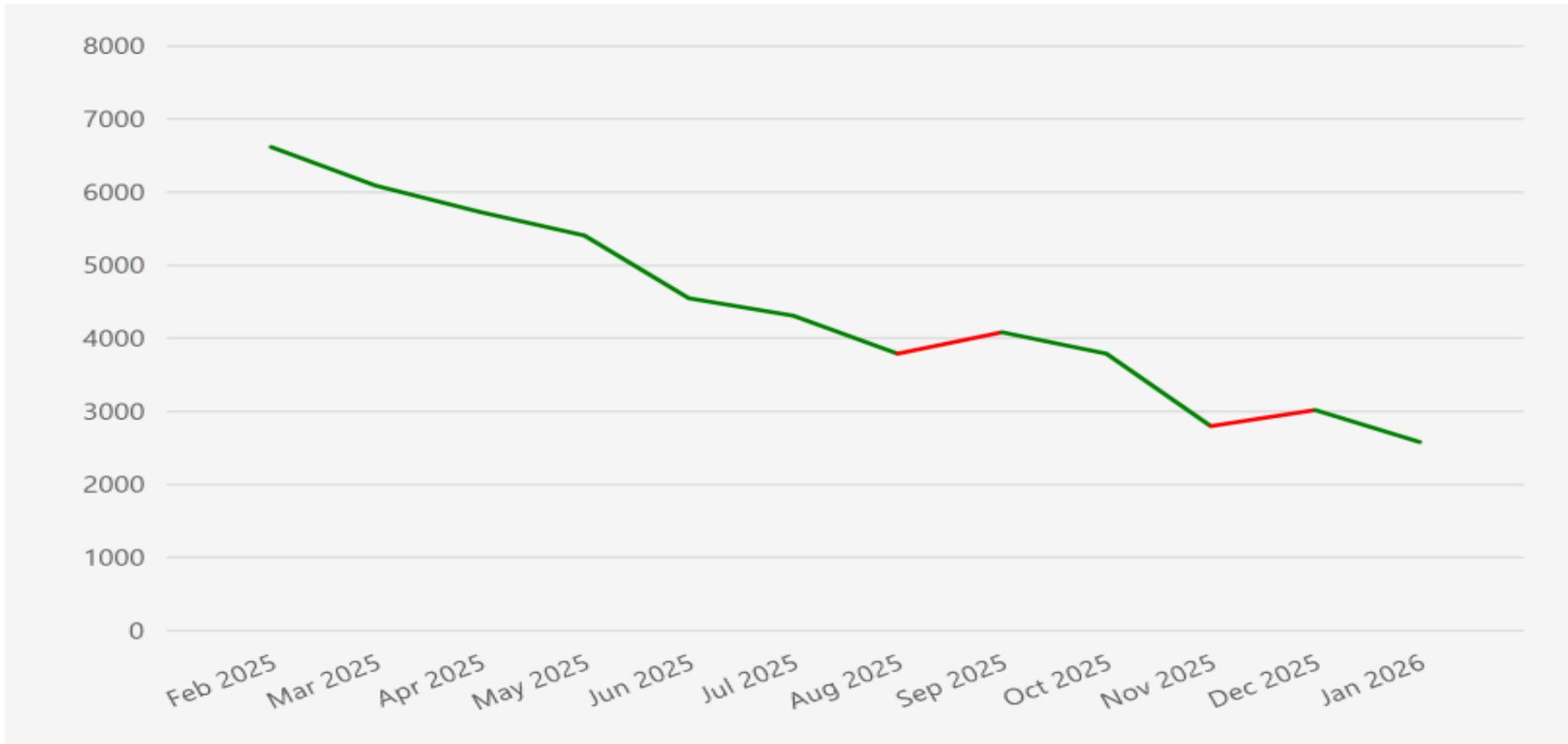
Status 2 Records



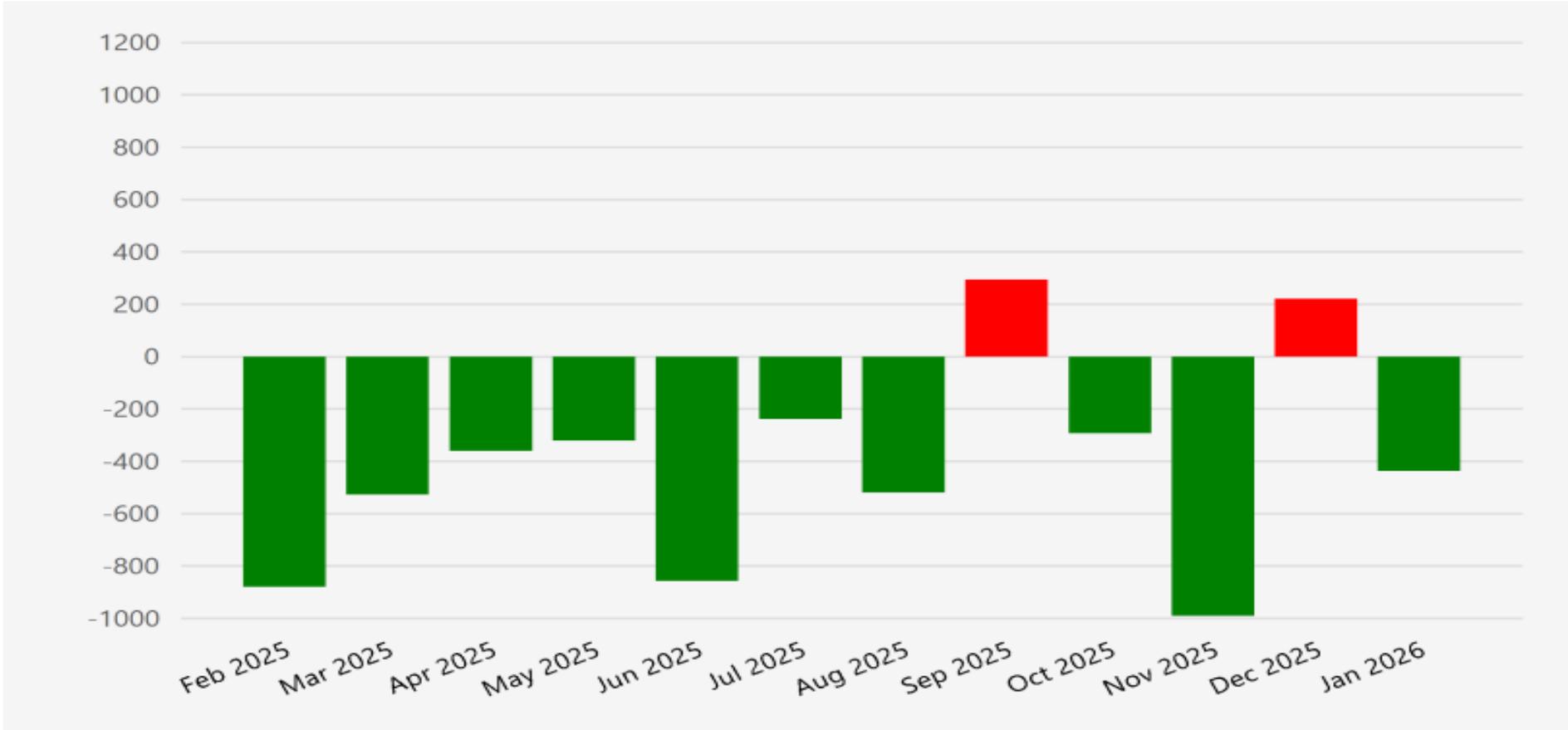
Status 2 Records



Feb 25	Mar 25	Apr 25	May 25	Jun 25	Jul 25	Aug 25	Sep 25	Oct 25	Nov 25	Dec 25	Jan 26
6618	6090	5729	5407	4549	4310	3790	4083	3790	2799	3019	2581



Status 2 Members Month on Month Reduction



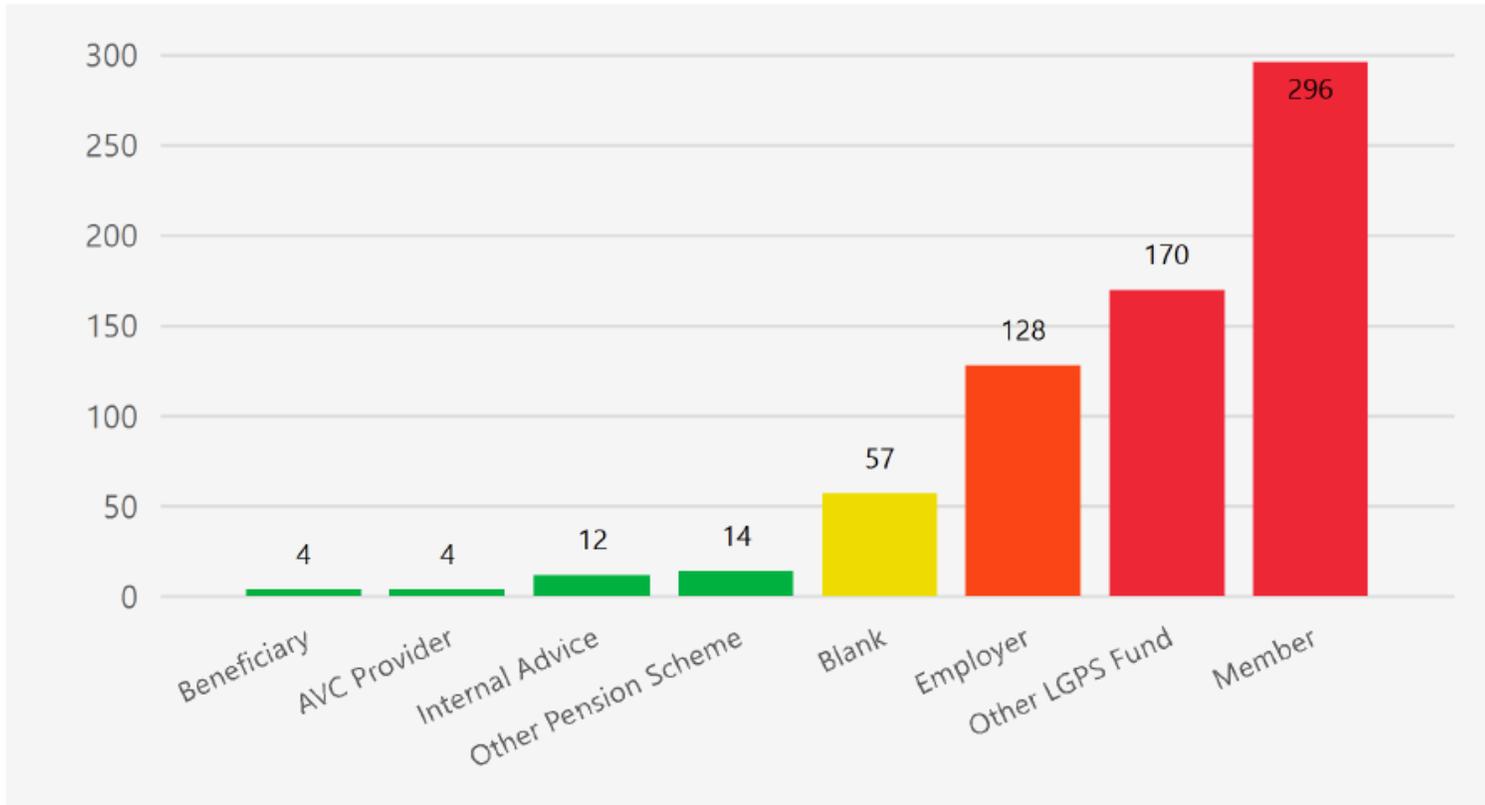
Status 2 Members Aged Analysis



Time Period	Age Bracket	Case (All Employers)
0-3 Months	Over 55	168
	Under 55	653
3-12 Months	Over 55	284
	Under 55	918
1-2 Years	Over 55	107
	Under 55	104
2 Years +	Over 55	194
	Under 55	153
Total:		2581

Type of Cases Outstanding on Status 2 Records

Status 2 Tasks - by Reply Due Type

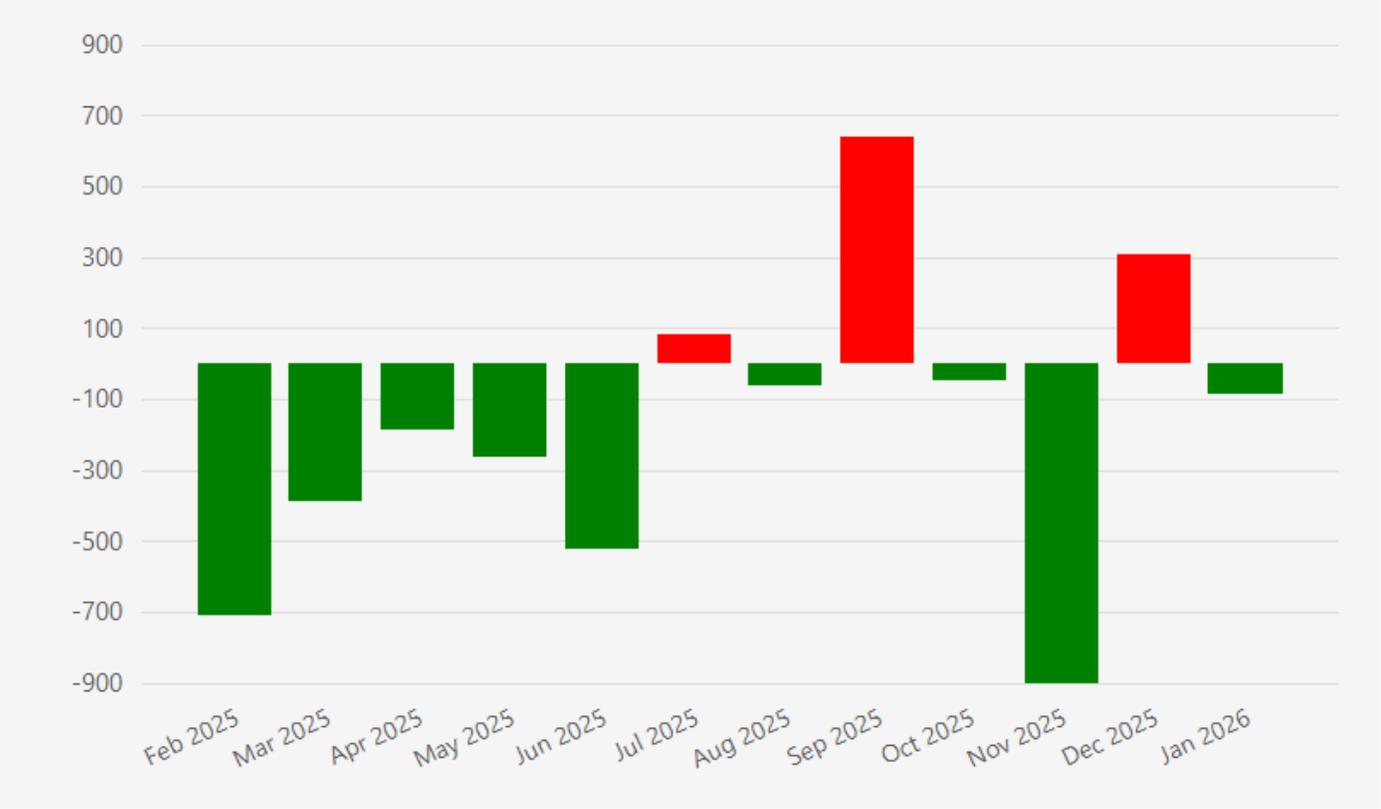


As at the end of January 2026 the total outstanding cases sat at 2581, of these, 685 are awaiting replies to enable processing.

296 are awaiting a response from the member and 170 are awaiting a response from another LGPS Fund

Status 2 - iConnect Leaver Cases (created v completed)

	Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	Jul 2025	Aug 2025	Sep 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026
Created	858	758	534	876	665	1084	743	1670	1114	676	982	813
Completed	1569	1147	720	1137	1186	1000	804	1030	1160	1644	672	898
Diff	-711	-389	-186	-261	-521	84	-61	640	-46	-968	310	-85



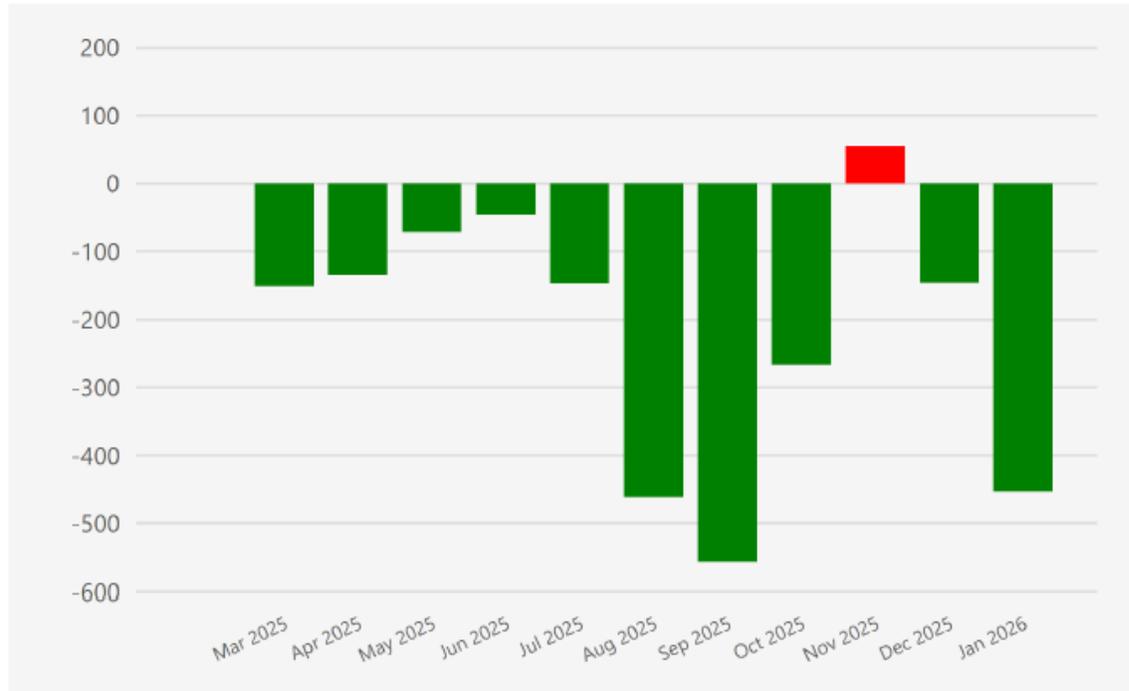
This chart shows the amount of leaver tasks that have been created and completed between Feb 25 and January 26.

Spikes are experienced in both December and September on a yearly basis, with the highest number of created cases being in September 2025 with a figure of 1670

Status 2 – Aggregations



		Mar 2025	Apr 2025	May 2025	Jun 2025	Jul 2025	Aug 2025	Sep 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026
Created	0	542	296	442	690	535	496	409	696	830	357	572
Completed	0	693	431	514	736	682	958	966	963	775	503	1025
Diff	0	-151	-135	-72	-46	-147	-462	-557	-267	55	-146	-453



The table shows Aggregations that have been created and completed from March 25 to January 26

An aggregation project was carried out between August and October to reduce the number of aggregations remaining in the fund

Data Improvement Plan



APF - Data Improvement Plan



- Formalises and structures data cleaning exercises
- Outlines the funds approach and aims to data cleansing
- Written in line with PASA recommendations
- Supports the new Pensions Administration Strategy (1st April 2026 launch)
- See Appendix 3 for report on TPR data cleansing

Thank you



If you have any questions please contact:

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Your pension, your future