

Service Plan - Administration Project Roadmap

11 March 2026

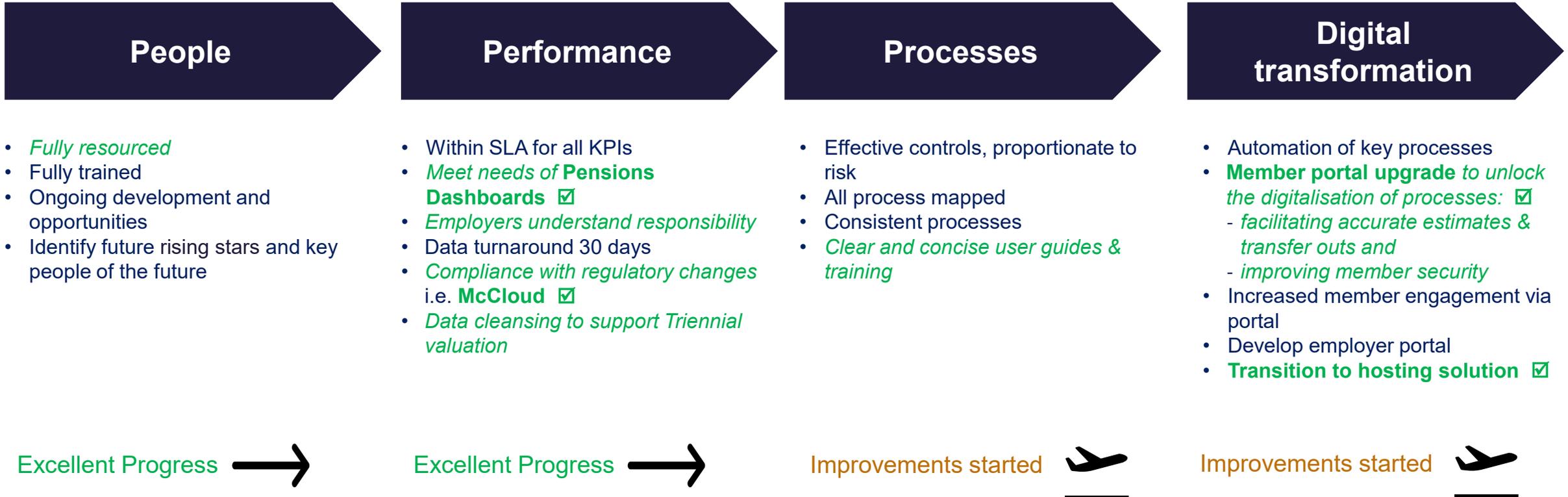


Avon
Pension
Fund



Your pension, your future

2025 and beyond – key priorities achieved



2025-26 Administration projects delivered

Regulatory / Foundation



Software supplier procurement



Administration Strategy



McCloud compliance



Triennial valuation support



Dashboard ISP connection



Telephony system enhancement

Key



Procurement



Member impacts



Software implementation



Employer impacts



Process improvements

Transformation



Member portal upgrade



Hosting migration



Data cleanse tool implementation



Hybrid mail implementation



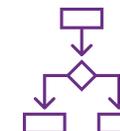
Employer portal MFA



Aggregation improvements



Employer engagement



Status 2 improvements

2026-27 focus – member experience & operational efficiency



Maximise member portal sign-ups



Prepare for Dashboard public launch



Comply with regulations (McCloud, Access)



Move member journeys online - building block approach

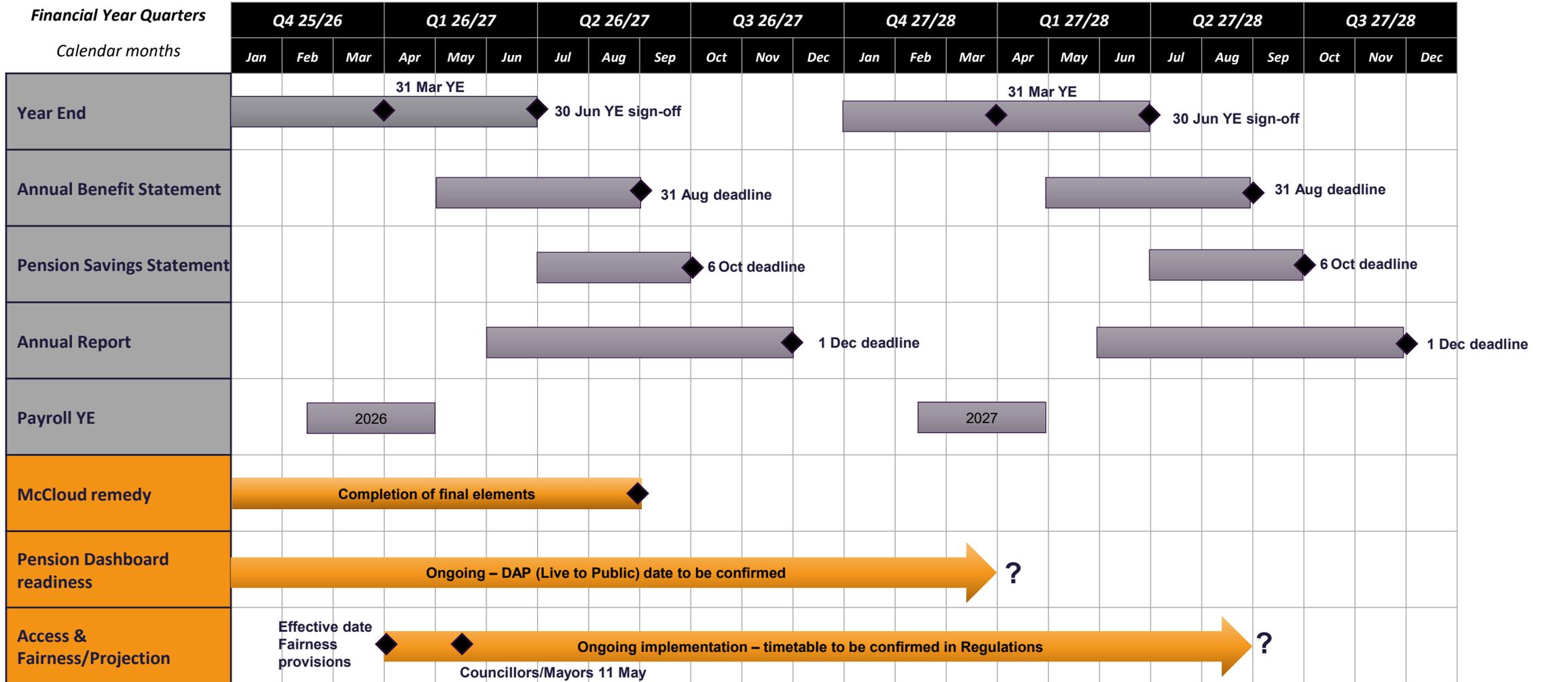


Continue process improvements - operational efficiency & risk control

2026-27 Annual & Regulatory Projects

Key:

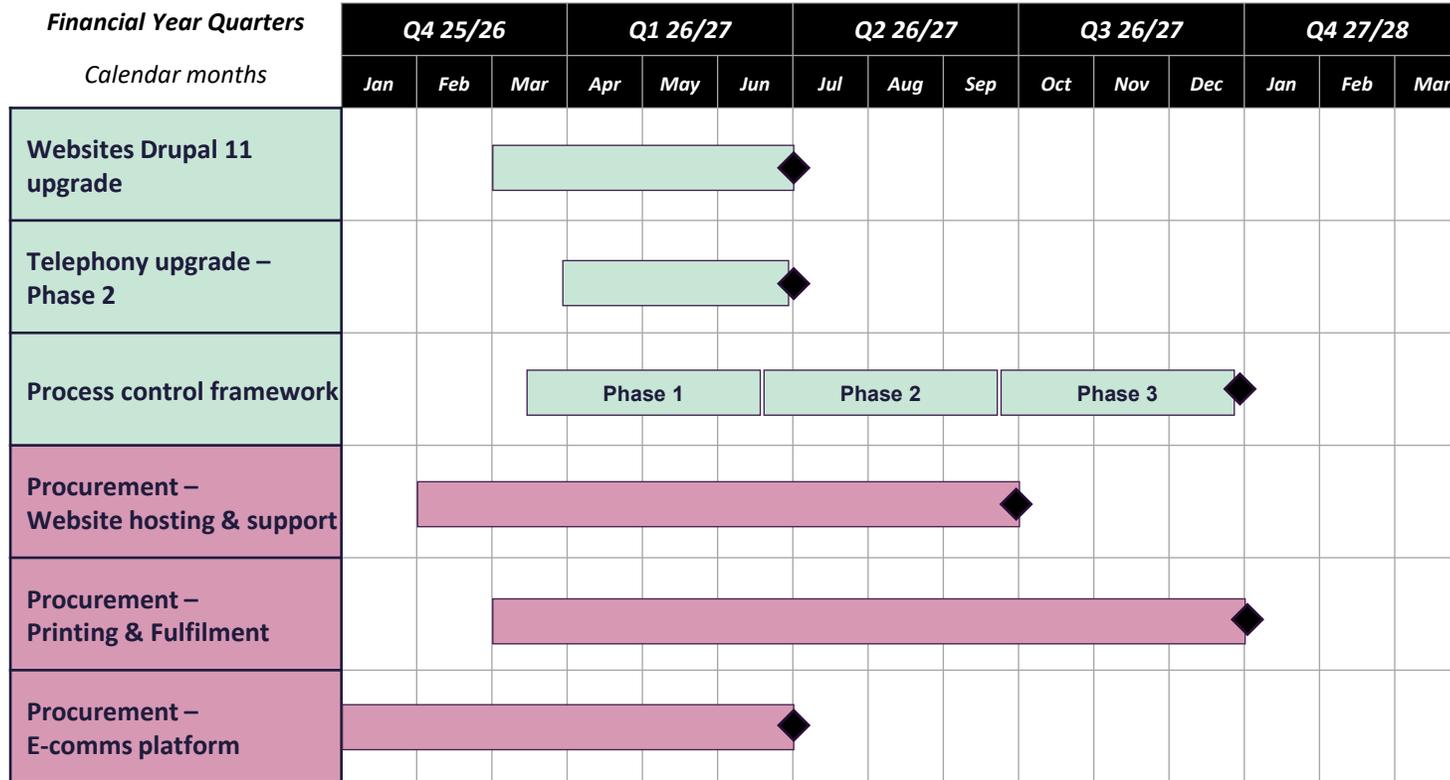
- Annual
- Regulatory
- Milestone



2026-27 Foundation & Procurement projects

Key:

- Foundation
- Procurement
- Milestone



Website upgrade improves performance, build tools and security.

Telephony Phase 2 introduces call recording and transcription facilities.

Three key supplier contracts to be re-procured during 2026.

2026-27 Transformation projects – IN PLANNING

Project	Description	Target date
New member onboarding	Deliver new process online for new starters.	Jun-26
Deferred leavers - online	Deliver digital and automation improvements including online journey using member portal.	In planning
Refunds - online	Deliver digital and automation improvements including online journey using member portal.	In planning
Retirements - online	Deliver digital improvements including online journeys for member initiated voluntary retirements (w/o AVCs), both for Active and Deferred members.	In planning
Enhanced Admin to Pay	Automates the interface between the Admin and Payroll modules. Improves controls.	In planning
Payslips and P60s – online	Enable upload to member portal with member communications.	May-26
i-Connect enhancements	Multi-factor authentication for employer login One-stop portal for employer document submissions	Apr-26 Dec-26

Bulk processing in Altair will be considered as part of Deferred and Refund projects.

‘Online’ projects will leverage processing/document storage features in the new member portal and automated workflow creation.

i-Connect is the employer data submission portal.

Thank you



If you have any questions please contact:

Claire Newbery

Pensions Operations Manager

Anne Black

Business Change Manager

Avon
Pension
Fund



Your pension, your future