

Administration Update 27th March 2026



Avon
Pension
Fund



Your pension, your future

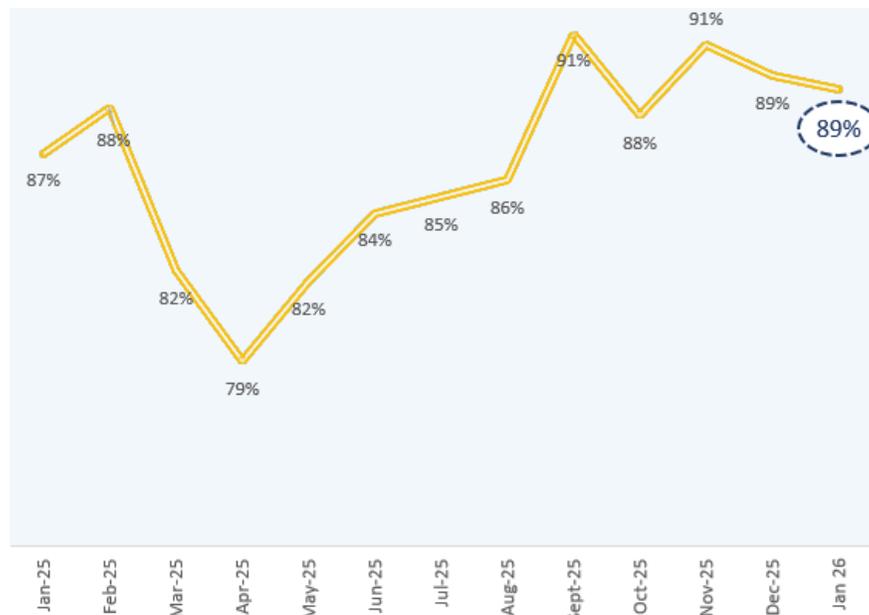
KPIs & service performance



SLA monthly performance average January 2025 to January 2026

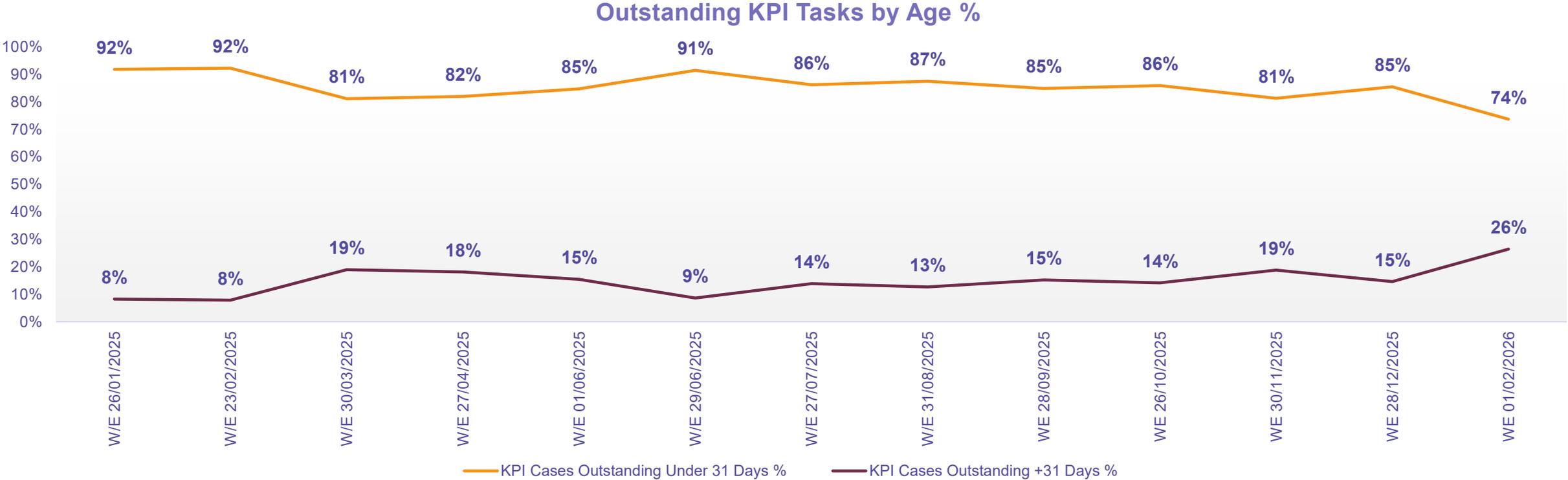
Average SLA Performance

*Based on weekly KPI data

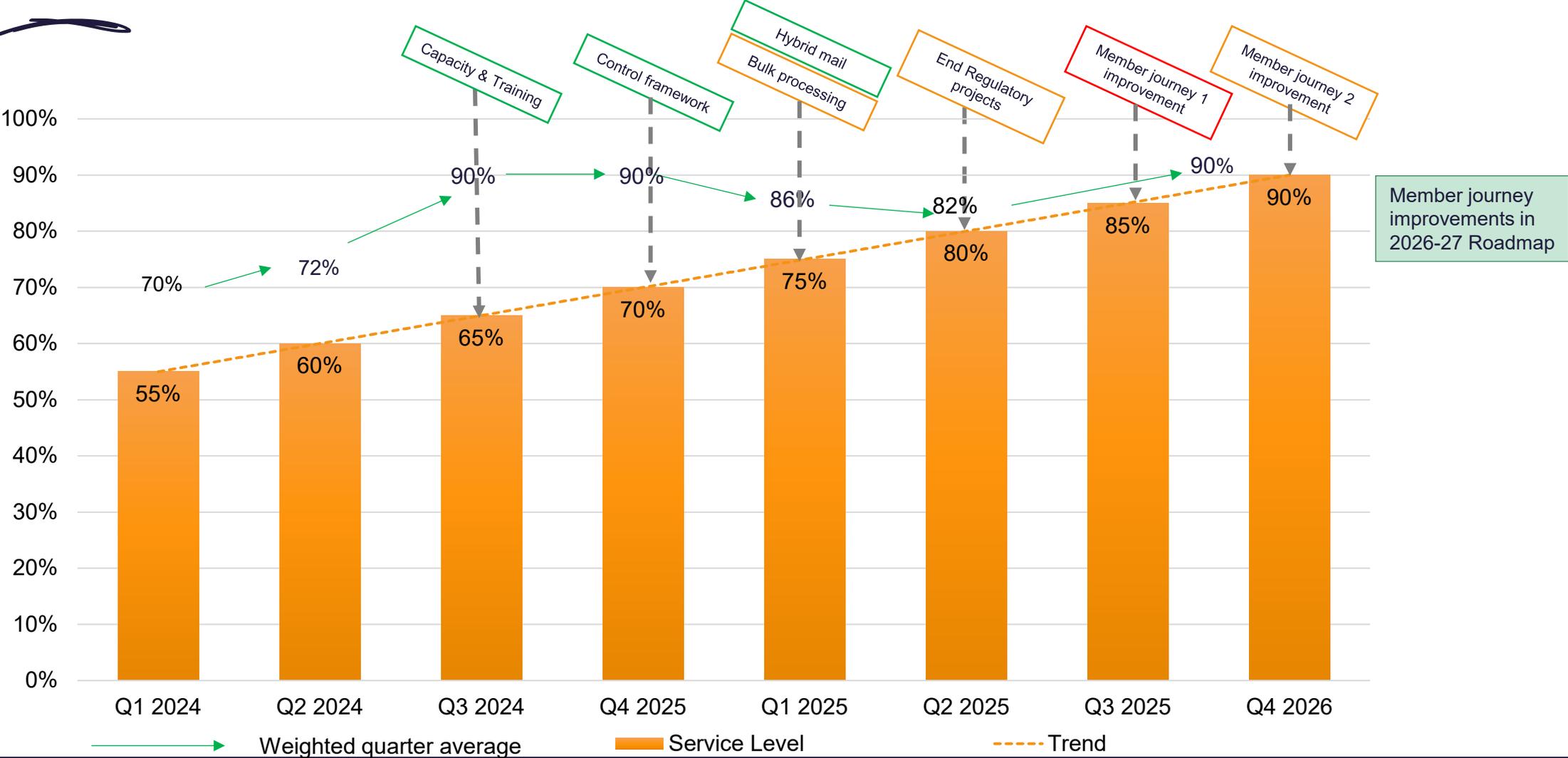


KPI Category	Jan-25	Feb-25	Mar-25	Apr-25	May-25	Jun-25	Jul-25	Aug-25	Sept-25	Oct-25	Nov-25	Dec-25	Jan 26	Cases Created Jan-24 to Jan-26
Death Notification	100.0%	93.8%	63.8%	71.0%	76.7%	90.6%	97.0%	98.2%	94.8%	98.7%	92.9%	97.2%	97.8%	1,261
Death - Act/Def/Pen - Payment	81.6%	65.3%	59.9%	49.2%	60.3%	52.6%	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's case by age % - Jan 2025 to Jan 2026



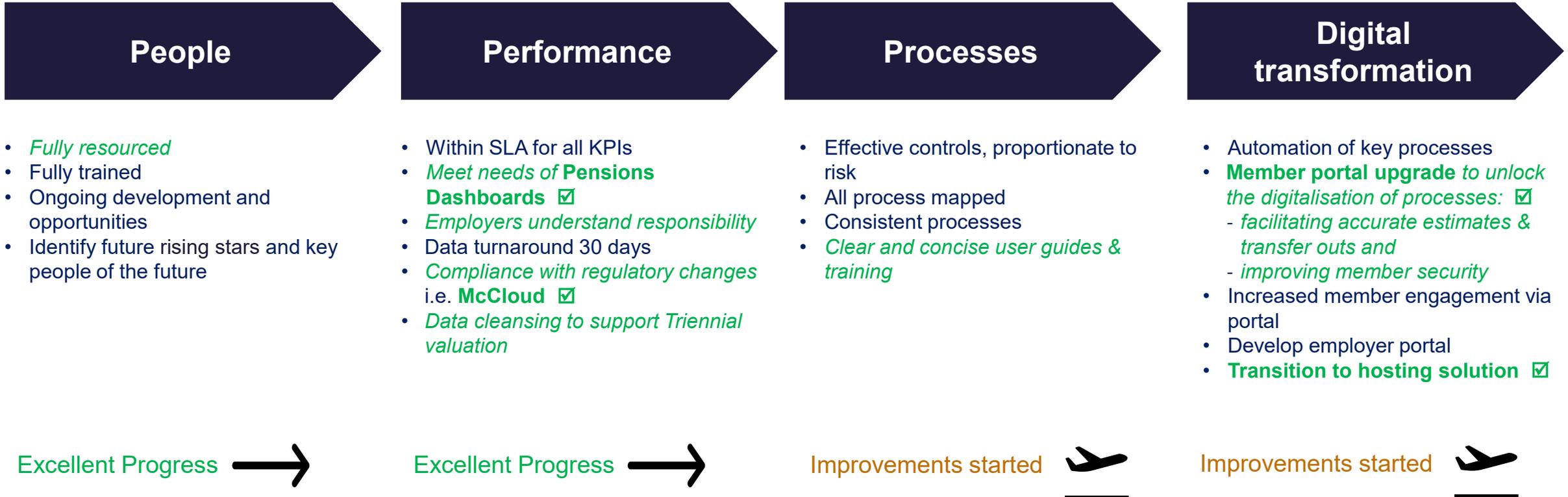
Service performance – plan vs. actual – Jan 2026



Administration Roadmap



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



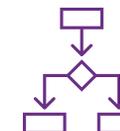
Employer portal MFA



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

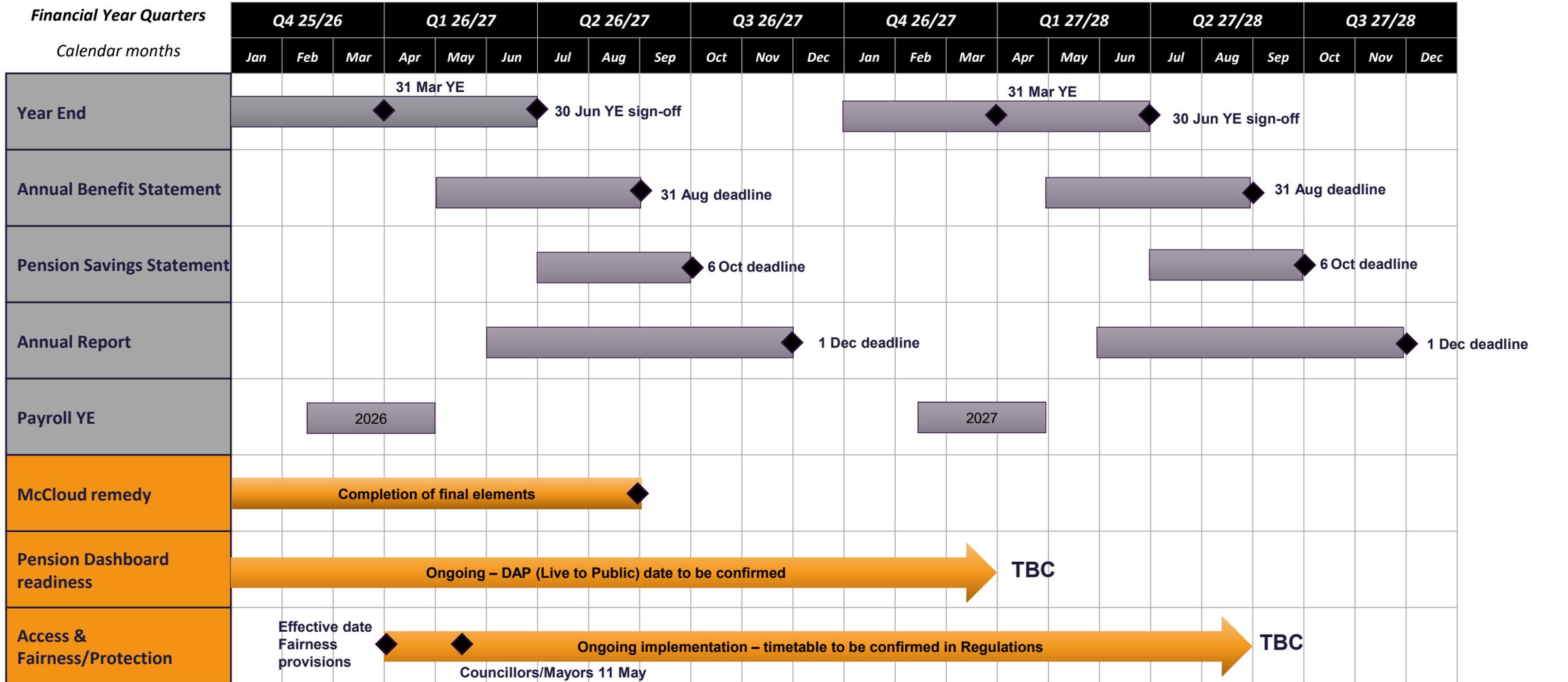


Continue process improvements - operational efficiency & risk control

2026-27 Annual & Regulatory Projects

Key:

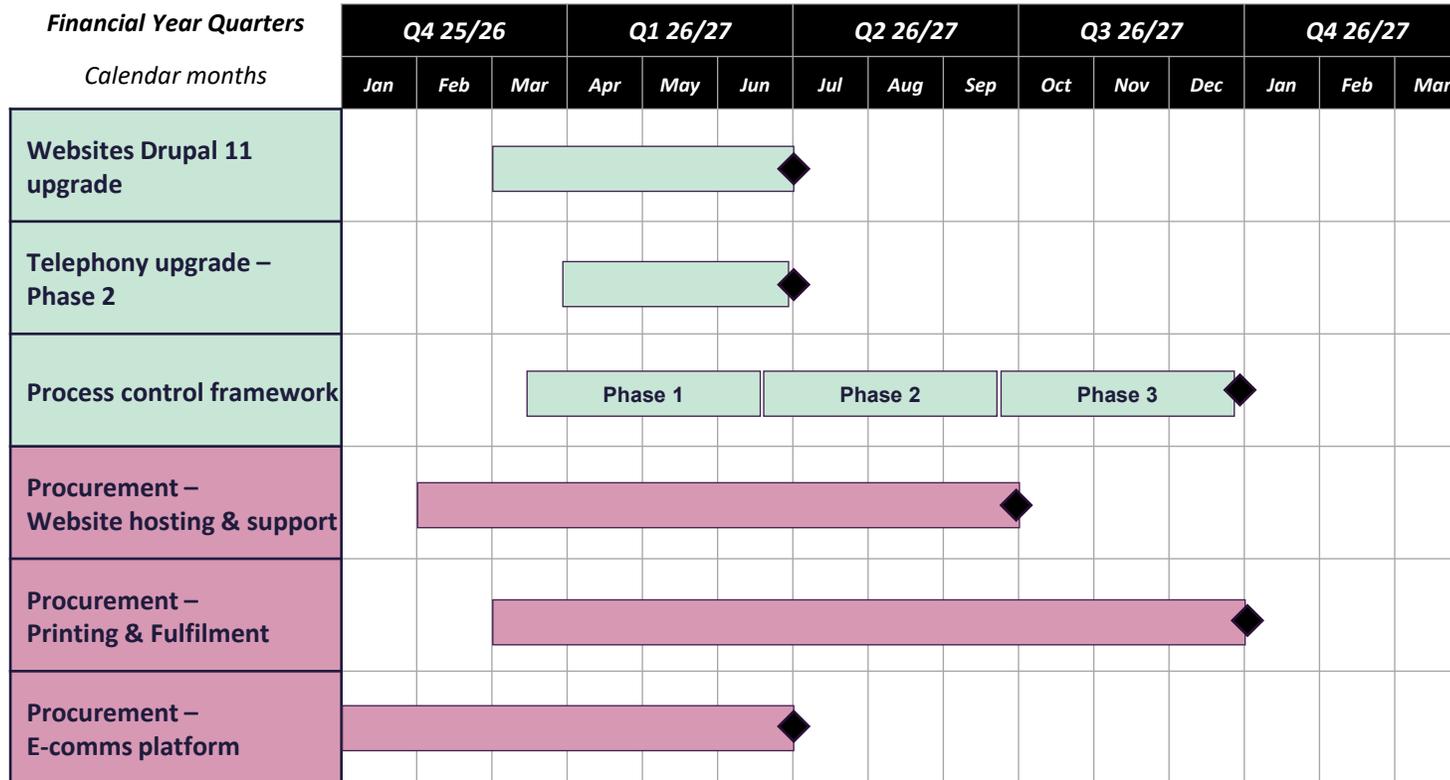
- Annual
- Regulatory
- Milestone



2026-27 Foundation & Procurement projects

Key:

- Foundation
- Procurement
- Milestone



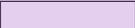
Website upgrade improves performance, build tools and security.

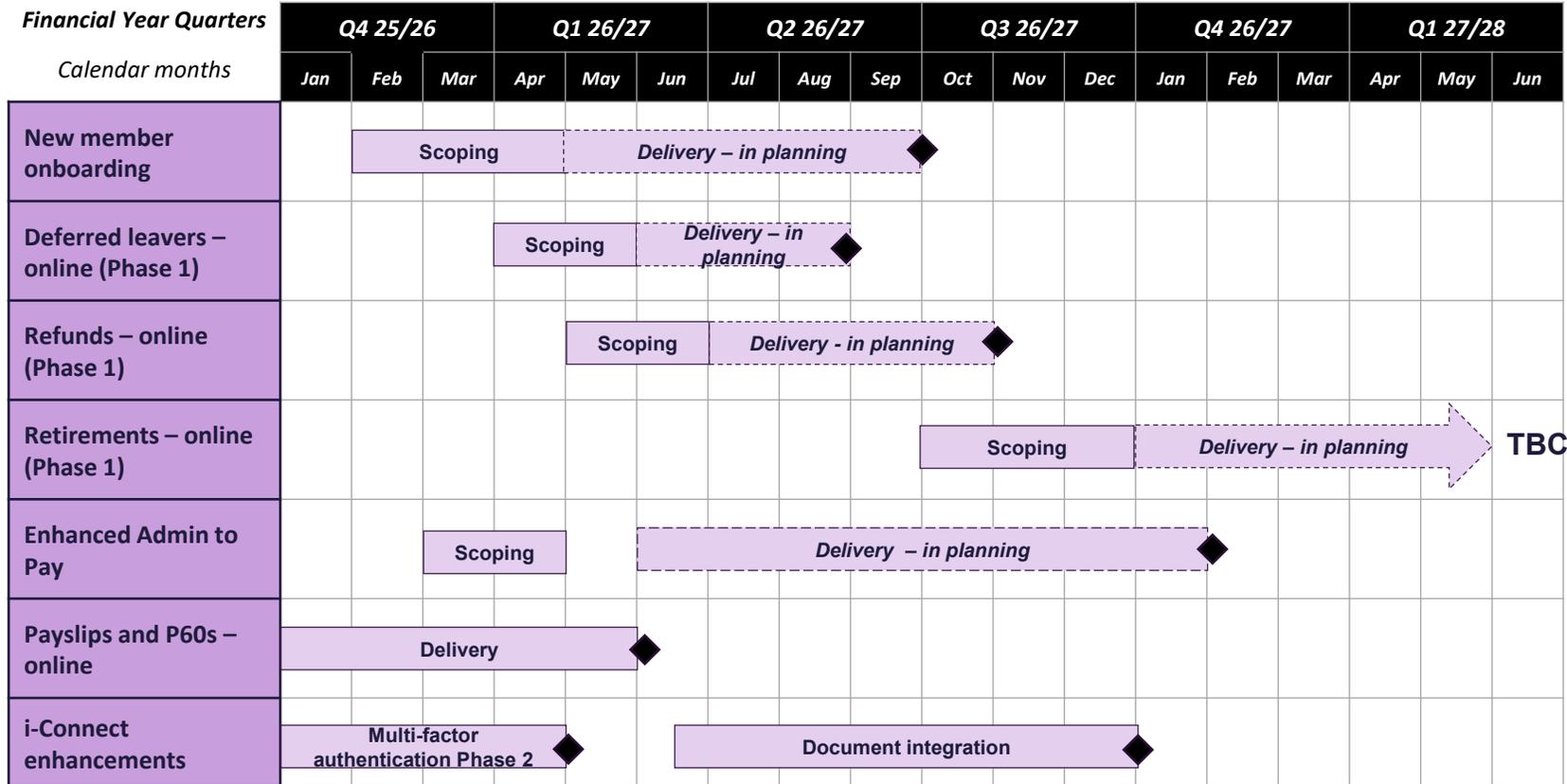
Telephony Phase 2 introduces call recording and transcription facilities.

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

2026-27 Transformation projects

Key:

 Transforming
 Milestone



Bulk processing in Admin system 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.

Retirements – online will cover member initiated voluntary retirements without AVCs – both from Active (Paying In) and Deferred (Not Paying In). We will delivery one journey before moving to the next.

Enhanced Admin to Pay automates the interface between the Admin and Payroll modules and improves controls.

i-Connect is the employer data submission portal.