

# **Report on the progress of the C.A.R.E. Strategy 2024 and beyond**

**June 2025**



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# A Message from Rosemarie McClean, Chief Executive of Pension Administration

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The United Nations Joint Staff Pension Fund has seen continuous growth since its establishment in 1949. By the end of 2024, the Fund was responsible for managing retirement, death, disability, and related benefits for staff across its 25 member organizations, serving a total of 150,704 participants and 89,308 periodic benefits in award.

Under the first C.A.R.E. Strategy (2021-2023), the Fund's Pension Administration made progress towards achieving its vision of becoming a service-oriented pension fund, providing exceptional, high-quality services to UNJSPF member organizations, participants, retirees, and beneficiaries worldwide. In 2024, building on the former strategy, we launched the C.A.R.E. Strategy 2024 and beyond, focusing on three strategic pillars: simplifying the client experience, modernizing pension services, and building a robust global partnership network. 2025 saw further growth and progression towards realisation of benefits within the three pillars, providing the basis for initiatives that shape the strategic plan through to 2030.

Our strategy involves specific performance measures to ensure enhanced and timely delivery of services and retirement benefits to participants, retirees, and beneficiaries. We diligently monitor progress toward achieving our strategic objectives and operational targets using well-defined performance KPIs aligned to our objectives that span Pension Administration. Additionally, we regularly assess risks and opportunities to adapt to our dynamic environment.

I am pleased to report that the implementation of the C.A.R.E. Strategy 2024 and beyond is on track, and performance measures are being achieved.

I commend the dedicated efforts of our Pension Administration staff, who have steadfastly pursued both the Fund's core mission and transformative initiatives.

This report highlights a year of progress and achievements under the C.A.R.E. Strategy 2024 and beyond, demonstrating our ongoing commitment to enhancing the Fund for our clients and member organizations.

Rosemarie McClean  
Chief Executive of Pension Administration  
June 2025

# Highlights

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In the first complete year of the C.A.R.E. Strategy 2024 and beyond, numerous successes have been achieved across all three pillars. Some of the highlights are:

- 2024 was the year with the highest number of benefits awarded in the Fund's history.
- Of the 37 current key performance indicators outlined in the C.A.R.E. Strategy, 33 out of 37 KPIs are on track, with 1 pending development in 2025.
- The implementation of a new Customer Relationship Management system (UNJSPF Connect). UNJSPF Connect phase 1 launched in November 2024 and additional phases are underway, featuring many future benefits, including a new Member Self-Service, Employee Self-Service, automation of the statement of benefits process, and the implementation of ePension.
- Development of a new business intelligence dashboard to track all C.A.R.E key performance indicators.
- Data Strategy development and launch, including a Data Governance Framework and establishment of a Data Governance Council and Data Stewards Committee.
- Since January 2024 there were 24 pension town halls with about 21,000 attendees, 35,000 views of recordings, and 3,000 questions answered during the session.
- A record 17,000 separations and recalculations were processed, with 93% of benchmarked benefits processed within 15 business days, exceeding the benchmark.
- We undertook a clean-up of the dependent records, which is 95% complete. This allows 144,000 active participants with dependents to view their dependent information through Member Self-Service.
- Monthly payroll has continued to be issued on time, despite steady growth.
- The Digital Certificate of Entitlement (DCE) has surpassed the 40,000-user mark as at June 2025, equivalent to 54.5% of the population of retirees and beneficiaries.
- Process streamlining is underway for Article 31 (withdrawal settlement) and 32 (deferral of payment or choice of benefit) processes.
- ISO/IEC 22310 Business Continuity Certification achieved, ISO/IEC 27001 Cybersecurity Certification was successfully renewed. The DCE successfully achieved the first ISO/IEC 42001 within the UN system.
- The Separation Notification (PF4) Interface was successfully implemented as a pilot project with the UN Secretariat, enabling the direct transmission of separation data necessary for calculation to the Fund. Following the pilot, a second organization, UNICEF, went live with the interface in June 2025.

- Successful implementation of new interfaces: HR Interface (enabling the direct transmission of demographic and employment contract data for participants) for IOM, ICAO and WMO, and the Financial Interface (enabling the direct transmission of data related to participants contributions) for ITU and ICC.
- A People Strategy was launched in March 2025, including 10 priority areas that span through the lifecycle of a staff member from recruitment, onboarding, lifetime and encompassing separation.
- Full embedding of the new accounting standard (IPSAS 49) in financial reporting.
- Enhancements to the UNJSPF website included the introduction of AI powered automatic translation into Arabic, Chinese, Russian and Spanish and the launch of a new, more user-friendly, 'Contact Us' page.
- An annual SPC Secretaries meeting was held in Geneva to discuss the Fund's achievements and initiatives, share best practices and explore ways to improve service delivery to clients.
- A new framework has been developed for establishing economic actuarial assumptions developed with the Committee of Actuaries and adopted to improve transparency of decision-making with stakeholders.

# Framework

## Integrated strategy covering three key pillars



## Integrated whole of organization strategy implementation approach incorporating:

Leadership and Strategy

People and Culture

Technology and Innovation

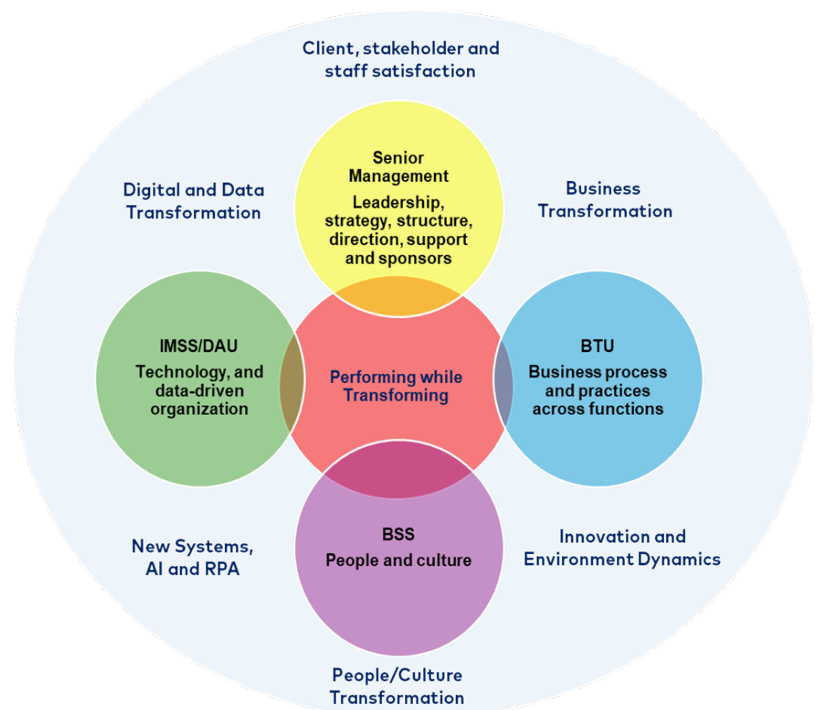
Processes and Practices

Structural Alignment

Stakeholders and Business

Organizational Synchronization

Business and Operational Activities (including Operations, Financial Services and Client Services)



# Strategic Performance Report

This report presents the performance in relation to the C.A.R.E. Strategy for the period from June 2024 to May 2025, focusing on strategic objectives, measures, actions, and Key Performance Indicators (KPIs).

KPI's assess the effectiveness of our strategic actions and provide insights into the organization's progress towards both strategic objectives and operational targets. The KPIs have been used to track services and process improvements across Pension Administration.

The C.A.R.E. Strategy now encompasses 37 measures, 11 of which are reported monthly, 23 annually, 1 quarterly, 1 ad-hoc and 1 under development. All KPIs are available for senior management review on a new business intelligence dashboard introduced in late 2024.

As of May 2025, most performance targets were either met or exceeded, with 32 measures on target, 4 off-target, and 1 KPI that is under development and will be reported annually starting in December 2025.

Following the implementation of UNJSPF Connect in November 2024, KPIs have been adjusted to reflect the different outputs of data. Some additional KPIs that have been refined are below.

## Edited KPIs:

Current KPI	New KPI	Target
Weighted average resolution time of tier 1 and tier 2 client inquiries and service requests in business days	Average resolution time of critical or high-priority services in business days	Within 4 business days
Client and Partner satisfaction with pension briefings and informational materials	Creation of 2 values: 1. Client satisfaction with pension briefings 2. Member Organisation satisfaction with pension briefings	4 or above (on a scale of 5)
Percentage of initial separation and benchmarked recalculations, benchmarked initial and post-retirement benefits cases processed within 15 business days	Percentage of initial separation and benchmarked recalculations processed within 15 business days	75% or above of benchmarked cases processed within 15 business days

Current KPI	New KPI	Target
Number of critical data elements that are identified and actively managed for data quality	Data Quality Score <i>To be first measured in 2026</i>	Target to be defined following development of methodology and initial measurement in 2025
% of tenders that include environmental sustainability considerations	<i>Removed</i> - tenders are centrally managed by the UN Procurement Division and are inclusive of environmental considerations.	N/A
Number of staff induction training sessions offered	Change in target value, given that induction materials are available online	At least 2 training sessions offered per year  <i>Change to: 1 training session offered per year</i>

Other minor changes to the wording of descriptions or the KPIs have also been made to improve clarity.



## Pillar 1 - Improve client experience

Ensure member satisfaction through improved services, simplified interactions, and clear communication with our participants, retirees and beneficiaries

### Highlights in 2024 - 2025

- The dependent records data clean-up is 95% complete, enabling approximately 144,000 active participants with dependents to view their dependent information through Member Self-Service.
- Implementation of a new customer relationship system, called UNJSPF Connect, to improve client services through case tracking, visibility and centralization. Phase one of this project was successfully implemented in November 2024, and phase two is well underway.
- First-ever two-track reinstatement of countries that were previously suspended, resulting in the feature being made available to beneficiaries residing in those countries.
- Implemented an uplift in the thresholds and scales for the Special Adjustment for Small Pensions for the first time since 2016.
- Data Quality Policy developed to guide the approach to ongoing data quality management end-to-end and improve service delivery.
- 93% of benchmarked benefits were processed within 15 business days - well above the target of 75%.
- The DCEs issued in 2024 surpassed the 38,000 mark.
- Monthly payroll has continued to be issued on time, despite steady growth.
- Suspension of 802 main benefits due to non-receipt of 2024 CE, down from 953 last year.
- COLA for 2024: 2.8% (from 1 April 2025, for USD track).
- Increased communications regarding long-term stability of the Fund to provide reassurance during turbulent times for the UN.
- Pension townhall sessions have been in place since January 2024. Since this time there have been 24 pension townhalls with about 21,000 attendees, 35,000 views of recordings and 3,000 questions answered during sessions.
- The Fund's website is now available in all six official languages: English, French, Russian, Spanish, Arabic and Chinese.
- New Contact Us page: Clients can now access not only the online form to email the Fund but also have a clearer view of the Fund's phone numbers, the in-person options, and how to submit documents electronically, by mail or in person.

- The “Urgent Assistance” webpage was also incorporated in the new page to ensure clients have clarity about what to do in case of non-receipt of a monthly benefit payment or death of a beneficiary.
- A new client satisfaction survey is under development and due for roll-out in summer 2025.
- Automation of pre-retirement letters sent to participants who are within 3 months of reaching normal retirement age/mandatory age of separation. This letter provides information on separation requirements.

## Progress against strategic actions

Key Objectives	Strategic Action	Status
<b>Improve services and simplify interactions with clients</b>	Implement a comprehensive Client Service Delivery Model (CSDM)	Ongoing
	Implement a Client Relationship Management system – UNJSPF Connect	Ongoing, Phase 1 Implemented
	Collect client feedback and insight through an enhanced client survey	Ongoing with development of approach
	Organize an annual townhall for all participants, retirees and beneficiaries	Implemented
	Improve and develop user-friendly client interfaces	Ongoing, further progress in Phase 2 of UNJSPF Connect implementation
	Improve data quality of client information	Ongoing
	Establish and secure payment channels or alternatives	Ongoing, Financial Suite commenced
	Develop capacity to respond quickly to failed payments	Ongoing, Financial Suite commenced
<b>Make pension clearer</b>	Better inform clients on pension matters through different channels	Ongoing
	Make pension briefings and information materials available to all staff and to separating staff	Ongoing, materials available on the UNJSPF website
	Develop tailored and targeted communication	Ongoing
	Ensure that communication is available in English and French	Ongoing Website now in six languages
	Continue reviewing and improving client communication and correspondence	Ongoing, as part of UNJSPF Connect implementation

## Key Performance Indicators

Legend:

On target

Off-target

Objective: Improve services and simplify interactions with clients		
Outcome: Client Satisfaction	Target	Average Jun 24 – May 25
Average client satisfaction survey score <sup>1</sup>	4 or above (on a scale of 5)	4.14
Average call wait time in minutes	Calls answered within 1 minute	22 seconds
Contact Centre call pickup rate	95% or above of calls picked up by the Contact Centre	96.2%
Phone call, email and contact form response time	Within 1 business day	0.4 business days
Average resolution time of critical or high priority services in business days <sup>1</sup>	Within 4 business days	4.7 business days Increase in timeframe due to preparation for UNJSPF Connect.
Outcome: Benefit Payment Reliability	Target	Average Jun 24 – May 25
Percentage of initial separation and benchmarked recalculations processed within 15 business days	75% or above of benchmarked cases processed within 15 business days	93%
Timeliness of payroll processing	100% successful monthly run	100.0%
Payment disbursement success	0.01% or below of benefit payments issued are returned by the bank	0.0%
Number of new payment routes without bank charges to the retiree/beneficiary	Two additional payment routes implemented per year	2 new routes implemented in 2024 Annual KPI, next figure to be published in December 2025
Number of payment currencies offered	17 or above	18 currencies Annual KPI, next figure to be published in December 2025
Outcome: Paperless Interactions	Target	Average Jun 24 – May 25
Percentage of electronic and digital documents received over total documents received	80% or above of documents received are electronic and digital documents	93% in 2025 Annual KPI, next figure to be published in December 2025
Objective: Make pension clearer		
Outcome: Client Satisfaction	Target	Average Jun 24 – May 25
Website user satisfaction score	75% of clients rate us 4 or above (on a scale of 5)	78.3%

Partner satisfaction with pension briefings	4 or above (on a scale of 5)	4.3
Client satisfaction with pension briefings	4 or above (on a scale of 5)	On target (4.7)
Pension briefings are available for all participants during onboarding and separation	80% or above of staff have access to the pension briefings	100% Briefings available on multiple platforms including YouTube and unjspf.org

<sup>1</sup> The introduction of UNJSPF Connect and associated business processes has led to a refreshed method of calculation for these metrics from November 2024 and as such reporting periods are not directly comparable.



## Pillar 2 - Modernize pension services

Focus on operational excellence and transformation as part of the Fund's work culture through people, processes, and technology

### Highlights in 2024 - 2025

- A Data Strategy was developed and launched, with the vision to fully establish UNJSPF Pension Administration as a data-driven organization, fostering a culture where quality data is embraced as a valuable asset, enabling better decision-making and ensuring long-term financial sustainability of the Fund and equipping our people for the future.
- The Data Governance Framework was launched, including establishment of a Data Governance Council and Data Stewards Committee.
- Successful renewal of ISO/IEC 27001 Cybersecurity Certification.
- Implementation and successful certification of ISO/IEC 42001 for Artificial Intelligence for the Digital Certificate of Entitlement.
- Implementation and successful certification of ISO/IEC 27701 for Privacy management.
- Over 80 processes were documented in 2024, including many for UNJSPF Connect.
- The HR interface, which enables member organizations to digitally transmit participant information between the HR system of the member organization and the Fund's administration systems, was successfully implemented for IOM, ICAO and WMO.
- The Separation Notification (PF4) Interface was successfully implemented as a pilot project with the UN Secretariat, enabling the direct transmission of PF data to the Fund. Following the pilot, a second organization, UNICEF, went live with the interface in June 2025.
- The Financial interface has successfully gone live for ITU and ICC, allowing member organizations to digitally transmit data regarding contributions of participants.
- Launch of a People Strategy in March 2025, including 10 priority areas that span through the lifecycle of a staff member from recruitment, onboarding, lifetime and encompassing separation. Initial focus areas include the outreach and sourcing of candidates.
- Significant changes in building environmental status were made, including installation of 3 stream trash and recycling stations, discontinuation of single use cups and promotion of biodegradable plates, cups and utensils.

## Progress against strategic actions

Key Objectives	Strategic Action	Status
<b>Embed business transformation as part of the Fund's culture and processes</b>	Generate efficiency gains through process optimization and technology	<b>Ongoing, over 80 processes generated</b>
	Keep abreast of trends that could benefit the Fund	<b>Ongoing</b>
	Enhance performance and accountability across all Fund's processes	<b>Ongoing, regular business process re-engineering initiatives</b>
	Engage staff in transformation and innovation across the functions	<b>Ongoing</b>
	Develop an internal culture of engagement, performance development, empathy, and empowerment	<b>Ongoing, People Survey was launched in 2025</b>
	Develop workforce planning	<b>Ongoing</b>
<b>Become a data-driven organization</b>	Implement a data strategy and a governance framework	<b>Completed</b>
	Continue implementing monthly contribution reconciliation across member organizations' reporting entities, to improve data quality	<b>Ongoing, implementation of financial interface for ITU and ICC</b>
	Continue harmonizing contribution calculation methodology across member organizations and reporting entities	<b>Ongoing</b>
	Continue the system-wide initiatives to automate interfaces and data transfer between the Fund and the member organizations	<b>Ongoing with interface projects</b>
<b>Innovate and leverage technology to improve services</b>	Plan, implement and integrate the Fund's future core systems	<b>Ongoing, with commencement of Financial Suite and continuation of UNJSPF Connect implementation</b>
	Keep pace with industry standards on cybersecurity	<b>Ongoing, including implementation of ISO/IEC 27701</b>
	Expand and embed Robotic Process Automation (RPA) and Artificial Intelligence (AI) in the Fund	<b>Ongoing, 4 RPA's deployed</b>

## Key Performance Indicators

Legend:

On target

Off-target

Objective: Become a data-driven organization		
Outcome: Data-driven organization	Target	Average Jun 24 – May 25
Percentage of contributions reconciled on a monthly basis	90% of all participants' accounts are reconciled monthly (by 2030)	Currently 4% Annual KPI, next figure to be published in December 2025
Objective: Contribute to the Sustainable Development Goals		
Outcome: Sustainable development	Target	Average Jun 24 – May 25
Gender parity ratio across all staff	Improvement towards 50/50 gender parity year on year	58% F, 42% M in 2024 Annual KPI, next figure to be published in December 2025
Gender parity ratio across staff of levels Professional and above	Improvement towards 50/50 gender parity year on year	41% F, 59% M in 2024 Annual KPI, next figure to be published in December 2025
Environmental sustainability improvement in building standards demonstrated	All facilities follow sustainable building standards	UNJSPF headquarters in New York is a gold standard building Annual KPI, next figure to be published in December 2025
Objective: Embed business transformation as part of the Fund's culture and processes		
Outcome: Organizational capacity and culture	Target	Average Jun 24 – May 25
Number of processes reviewed and improved	Four or more activities completed per year	80 processes reviewed and improved as part of UNJSPF Connect and other continuous improvement projects Annual KPI, next figure to be published in December 2025
Suggestion box response time	100% of the ideas responded to within 30 days	100%
Number of training sessions offered to staff on lean and business process improvement	One training session per year	1 training session in 2024 Annual KPI, next figure to be published in December 2025
Staff survey	Increase in staff agreement score year on year	74% in 2024 Annual KPI, next figure to be published in December 2025
Percentage of staff performance reports completed	90% or above completed by the deadline	99.5% in 2024 Annual KPI, next figure to be published in December 2025
Number of staff induction training sessions offered	At least 2 training sessions offered per year	1 session in 2024 deemed appropriate due to fewer new staff Annual KPI, next figure to be published in December 2025
Percentage completion of mandatory training	90% completed	90%

**Objective: Innovate and leverage technology to improve services**

**Outcome: Technology innovation and cybersecurity**

**Target**

**Average Jun 24 – May 25**

Number of RPA and automation tools deployed

Four RPAs deployed per year

4 RPAs deployed in 2024  
Annual KPI, next figure to be published in December 2025

Cybersecurity scorecard score

89 (B) or above

93 (A)



## **Pillar 3 - Strengthen relationships with all stakeholders**

**Enhance trust, collaboration, and transparency**

### **Highlights in 2024 - 2025**

- A new framework has been developed for establishing economic actuarial assumptions developed with the Committee of Actuaries and adopted to improve transparency of decision-making with stakeholders.
- This annum saw the full embedment of the new accounting standard (IPSAS 49) in financial reporting.
- Implementation and certification of ISO/IEC 22301 standard for business continuity.
- Efforts have been undertaken to promote pension briefings with SPC's to increase attendance and knowledge. An annual SPC event was held in Geneva to discuss Fund's achievements and initiatives, share best practices and explore ways to improve service delivery to clients.
- Quarterly webinars are held with member organizations.
- Participation in the UN Digital ID project and the successful launch of the first go-live Pension Fund use case with select member organizations.
- Annual Letter 2025 (April 2025), Annual Report 2023 (September 2024), The Fund in brief 2024 (November 2024), Annual Communications Report 2024 (February 2025), Financial Statements 2023 (October 2024) issued on time.
- The UNJSPF achieved a transparency score of 87 from CEM Benchmarking, nearly doubling its mark over a period of two years.
- Development of Organizational KPI dashboard, which monitors turnaround time in the submission of separation documents.

## Progress against strategic actions

<b>Key Objectives</b>	<b>Strategic Action</b>	<b>Status</b>
<b>Contribute to the Sustainable Development Goals</b>	Contribute to achieving gender balance including implementing the UN-wide Strategy on Gender Parity	<b>Ongoing, People Strategy launched in 2025</b>
	Integrate environmental sustainability into our procurement processes and operations including energy efficiency, waste management and water use in our facilities.	<b>Ongoing</b>
	Promote behavioral change, and sustainability awareness campaigns among staff	<b>Ongoing, including CARE Survey 2025</b>
	Leverage digital identity for greater financial and social inclusion through the UN Digital ID project for all staff	<b>Ongoing</b>

## Key Performance Indicators

Legend:

On target

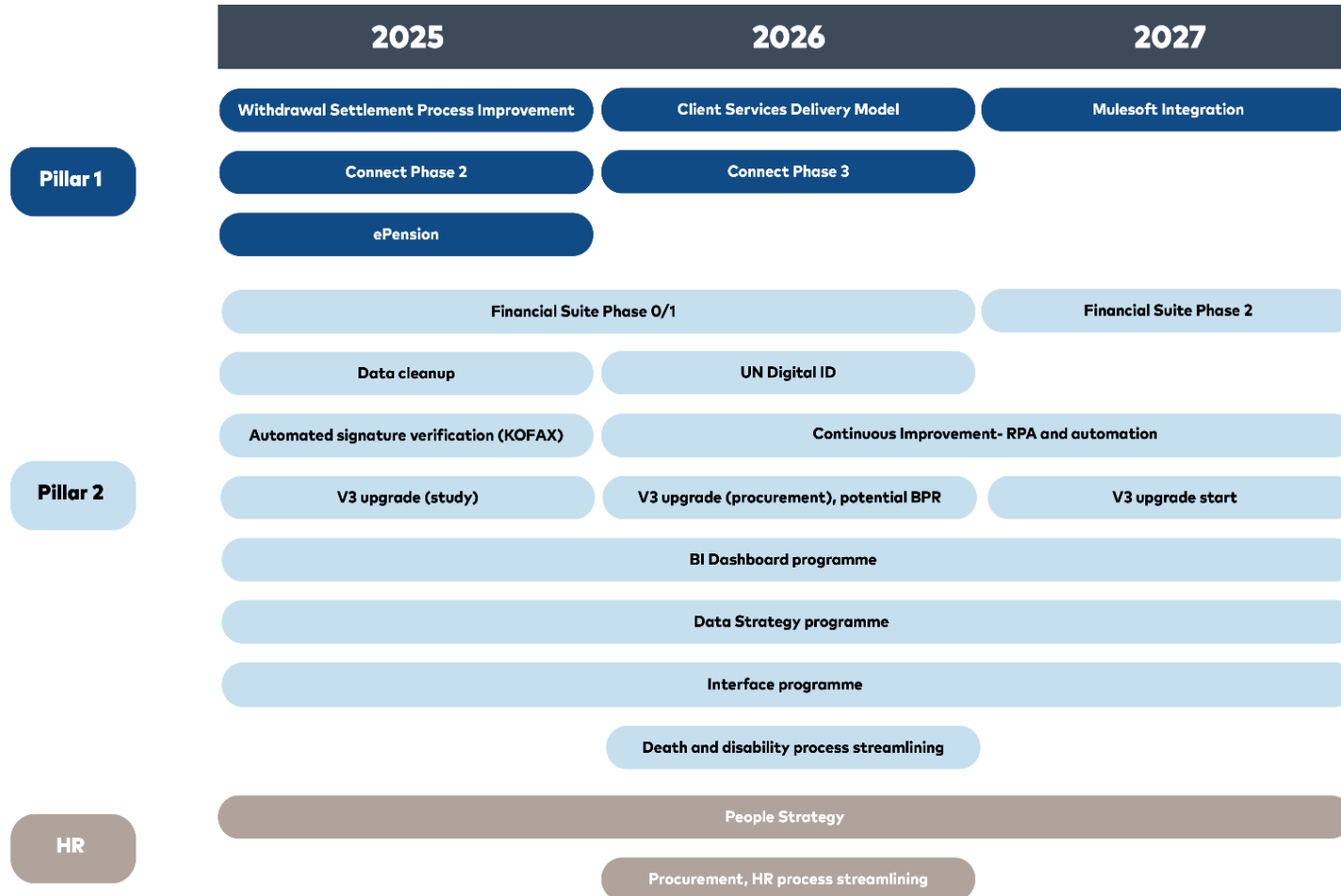
Off-target

### Objective: Enhance trust between the Fund and other member organizations and other stakeholders

Outcome: Open and transparent communication		
	Target	Average June 24 – May 25
Timely and accurate external reporting	100% timely delivery of annual reports, annual letters, and financial statements. No material weaknesses reported by the external auditors	100% in 2024-2025 period Annual KPI, next figure to be published in December 2025
Number of staff townhalls held	Four townhalls with all PA staff per year	5 in 2024 Annual KPI, next figure to be published in December 2025
Number of client townhalls held	One townhall with all participants, retirees, and beneficiaries per year	15 in 2024 Annual KPI, next figure to be published in December 2025
Number of SPC secretary meetings held	One meeting with all SPC secretaries per year	1 in-person and quarterly webinars
Number of UN family events held	One UN Family Event per year	One event held 2024 with the following postponed to Q4 2025. Quarterly meetings ongoing.
Number of individual meetings with member organizations	One individual meeting with each member organization per year	63 in 2024 Annual KPI, next figure to be published in December 2025
Outcome: Member organization satisfaction		
	Target	Average Jun 24 – May 25
Member organization satisfaction score on a scale of 1 to 5	4 or above (on a scale of 5)	5 of 5
Average resolution time of member organization inquiries and service requests	80% of member organization inquiries and service requests resolved within 2 business days	96.3%

# Strategic Modernisation Roadmap

As part of the implementation of the C.A.R.E. Strategy, a transformation programme from 2025-2027 was proposed and approved in early 2025. The programme encompasses key initiatives and projects:



## Strategic Initiatives

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As above, key focus areas for 2025 includes the following strategic initiatives:

- Continuation of the implementation of UNJSPF Connect, which will improve client experience and enhance member satisfaction. Following the first release in November 2024, phase two implementation includes Employer Self Service, Member Self Service, and integrations across Statement of Benefits and E-forms.
- Implementation of Multi-Factor Authentication (MFA) enhances security by requiring users to verify their identity in addition to their password. MFA will be essential for future system enhancements. With MFA in place, even with a password compromised unauthorized access is prevented by the secondary verification layer. Adoption of MFA has aligned UNJSPF with best practices and demonstrates a strong commitment to protecting user data.
- The Fund has identified a new Financial Suite, which will improve financial reporting and analytics capabilities, enable better decision-making and resource allocation, streamline financial processes and reducing manual efforts and minimize the risk of errors while offering greater transparency.
- We have improved how we implement digital technologies by adopting a holistic approach, starting with reviewing and re-engineering our current processes as part of Phase 0 to fully leverage the capabilities of the new systems and apply change management strategies to realize and sustain the benefits.

## UNJSPF People Strategy

Building on the solid progress captured in last year's C.A.R.E. report, the People Strategy 2025 went live in March 2025, locking in a clear, ten-point roadmap across the entire staff-lifecycle for the Fund.

The plan has a strong focus on talent attraction—refreshed outreach campaigns, new innovative tools and streamlined recruitment workflows while widening candidate pools from un/under-represented regions and addressing gender parity gaps.

Advanced analytics dashboards are also in scope to give managers one-click visibility on skills gaps, retention risks and demographic shifts, while automated workflows are poised to strip out low-value transactions and push mandatory-training compliance towards 100%. These tools sit alongside an expanded learning suite that puts every D-level and P-4/5 manager through leadership training and offers bite-sized up-skilling on emerging tech and data literacy for all staff.

The Strategy also links culture to delivery. A staff-centric work model—embracing flexible working, corporate social responsibility initiatives and a growing network of

culture advocates—seeks to keep engagement high and turnover low. It introduces stronger partnerships with focal points on key topics such as gender, anti-racism or disability-inclusion. A new People-Analytics function is expected to monitor these signals in real time, ensuring the Fund continues to have the right skills in the right place at the right time while safeguarding the institutional know-how.

## UNJSPF Data Strategy

In the first half of 2025, Pension Administration launched its data strategy to full establish itself as a data-driven organisation, fostering a culture where quality data is embraced as a valuable asset, enabling better decision-making, supporting the delivery of excellent client service, meeting the evolving needs of our stakeholders, ensuring long-term financial sustainability of the Fund and equipping our people for the future. Under that strategy, it has developed a new data governance framework to ensure that data is managed, protected and used effectively for the benefit of our clients and stakeholders. This has also included the adoption of a new data quality policy which will help to guide our approach to data quality management.

## UNJSPF Cultural Assessment

As shown below, since commencing the cultural assessments in 2021, the Fund has seen a progressive improvement, from a 57% in the first leadership culture assessment survey to an 83% agreement rate in the most recent CARE Survey.

For the 2025 survey, there was a change in the cultural assessment methodology, with more focus on how well staff manage stress, uncertainty and change at the individual, team and organisational levels. Experiences were measured across personal well-being and resilience, team collaboration and leadership and organisational clarity and support.

The data showed very positive responses in the areas of wellbeing, handling stress and uncertainty, with staff feeling confident in their ability to adapt, manage stress and stay engaged with others. Most teams appeared to operate at a high level of trust, adaptability and communication, an improvement from the 2024 findings.

The survey revealed there are areas for focus and attention to further improve the Fund that include:

- Workload and staff gaps
- Workload distribution and resistance to change
- Uneven communication and staff engagement
- Cross team collaboration.

## The Numbers\*

150,704	Participants in 2024 (▲ 0.6%)
86,013	Periodic benefits in 2024 (▲ 3.7%)
13,297	New entrants in 2024 (▼ 16.8%)
12,263	Separations in 2024 (▲ 31%)
\$3.66bn	Contributions in 2024 (▲ 7.3%)
\$3.84bn	Benefit payments in 2024 (▲ 4.9%)
4.7 business days	Average resolution time of critical or high priority services in business days
4.14 out of 5	Average client satisfaction survey score
22 seconds	Average call response time
100%	Successful payroll run
92.8%	Benchmark benefits processed within 15 business days (first benefit payment and recalculation)
> 38,000	Digital Certificate of Entitlements
259	Staff in Pension Administration

\* Figures as at May 2025

# Key Performance Indicators Definitions

The following tables list and define the targets for the Key Performance Indicators (KPIs) for each of the strategic pillars. Select C.A.R.E. KPIs have been clarified and refined since the C.A.R.E. Strategy 2024 and beyond was published in 2023.



## Pillar 1 - Improve client experience

Ensure member satisfaction through improved services, simplified interactions, and clear communication with our participants, retirees and beneficiaries

Key Objective	Outcome	Key Performance Indicator	ID	Measure	Description	Target	Refresh Frequency
Improve services and simplify interactions with clients	Client Satisfaction	Client satisfaction score	1	Average client satisfaction survey score	To ensure we are listening to our clients and acting on their feedback, we collect client satisfaction surveys for many of our business processes. This key performance indicator measures overall client satisfaction.	4 or above (on a scale of 5)	Monthly
		Contact Centre response time (phone call, email, web)	2.1	Average call wait time in minutes	This measure defines average response time as the amount of time it takes agents to answer an inbound call.	Calls answered within 1 minute	Monthly
			2.2	Contact Centre call pickup rate	Insight into how many calls were terminated before they had the opportunity of being connected with an agent.	95% or above of calls picked up by the Contact Centre	Monthly

Key Objective	Outcome	Key Performance Indicator	ID	Measure	Description	Target	Refresh Frequency
			2.3	Phone call, email and contact form response time	This measure defines the average time a contact centre agent responds to phone calls, emails and contact form (tier 1 response time).	Phone calls, email and contact form responded to within one business day	Monthly
			3.1	Average resolution time of critical or high priority services in business days	This measure is an assessment of our resolution of incoming client enquiries and service requests. We measure response rates with designated service level targets.	Within 4 business days	Monthly
	Paperless interactions	Percentage of electronic and digital documents over total documents received	4	% of electronic and digital documents received over total documents received	This measure is calculated as the percentage of electronic documents received through email or uploaded through Member Self-Service and Digital Certificate of Entitlement app.	80% of all documents received electronic or digital documents	Annually
	Benefit payment reliability	Benefit processing benchmark of initial and post-retirement benefits cases	5	% of initial separation and benchmarked recalculations processed within 15 business days	The key performance indicator for benefit processing timeliness measures one of our most critical priorities: ensuring that clients' benefits are processed in a timely manner. This includes the initial pension cases and post-retirement benefits cases.	75% or above of benchmarked cases processed within 15 business days	Monthly
		Timeliness of payroll processing	6	Payroll run success rate %	The monthly payroll is closed and submitted on time to the bank.	100% successful monthly run	Monthly

Key Objective	Outcome	Key Performance Indicator	ID	Measure	Description	Target	Refresh Frequency
Make pension clearer		Payment disbursement success	7	% of rejected payments	In some cases, incorrect payment information (banking information, currency code, etc.) results in the one-time or periodic payment being rejected. The key performance indicator is calculated as the number of rejected payments over the total number of payments issued. We also measure the costs of erroneous transactions.	0.01% or below of benefit payments issued are returned by the bank	Monthly
		Number of new payment routes without bank charges to the retiree/beneficiary	8	Number of new payment routes without bank charges to the retiree/beneficiary	This measure is calculated as the number of countries for which the Pension Administration (PA) has implemented the domestic payment method, which translates to benefits received without bank charges to the beneficiary. This is an indicator of the level of service provided to retirees/beneficiaries.	Two additional payment routes implemented per year	Annually
		Number of payment currencies offered	9	Number of payment currencies offered	This measure is calculated as the number of payment currencies offered by PA and is an indicator of the level of service provided to retirees/beneficiaries.	17 currencies or above	Annually
	Clients make informed decisions	Website user satisfaction score	10	% of clients that rate us 4 or above on website user satisfaction	This key performance indicator measures how satisfied clients are with using the website (information provided, ease of navigation) based on a survey.	75% of clients rate us 4 or above (on a scale of 5)	Ad-hoc
		Partner satisfaction with pension briefings	11.1	Average partner satisfaction score with pension briefings	This key performance indicator measures the satisfaction of our partners who attend educational offerings, including webinars, pre-retirement seminars, instructor-led training, eLearning, and other benefit education events and briefing. Closely monitoring satisfaction data ensures our educational offerings meet expectations.	4 or above (on a scale of 5)	Annually

Key Objective	Outcome	Key Performance Indicator	ID	Measure	Description	Target	Refresh Frequency
		<b>Client satisfaction with pension briefings</b>	<b>11.2</b>	Average client score with pension briefings	This key performance indicator measures the satisfaction of our clients who attend educational offerings, including webinars, pre-retirement seminars, instructor-led training, eLearning, and other benefit education events and briefing. Closely monitoring satisfaction data ensures our educational offerings meet expectations.	4 or above (on a scale of 5)	Annually
		<b>Pension briefings available for all participants during onboarding and separation on iSeek, Inspira or equivalent</b>	<b>12</b>	% of new participants and pre-separation participants informed of availability of pension briefing materials	UNJSPF hosts the pension briefings and developed eLearning modules and other educational materials for our participants, retirees, and beneficiaries. This key performance indicator ensures that these pension briefings and educational materials are available to all participants through established channels such as iSeek, Inspira, or equivalent.	80% or above of staff have access to the pension briefings	Annually



## Pillar 2 - Modernize pension services

Focus on operational excellence and transformation as part of the Fund's work culture through people, processes, and technology

Key Objective	Outcome	Key Performance Indicator	ID	Measure	Description	Target	Refresh Frequency
Embed business transformation as part of the Fund's culture and processes	Organizational capacity and culture	Number of processes reviewed and improved	13	Number of processes reviewed and improved	Lean is a continuous business process improvement approach to reduce waste and increase value to clients. This key performance indicator measures the adoption of lean and business process improvement practices and tools and their application to improvement activities.	Four or more activities completed per year	Annually
		Suggestion box response time	14	% of Suggestion Box ideas responded to within 30 days	The Suggestion Box is the Pension Administration (PA)'s staff-driven continuous improvement and innovation program, designed to inspire staff to share ideas and solutions that will improve PA. All ideas will be evaluated and scored based on perceived business value and effort to implement by the SMT and the outcome of the ideas will be shared with staff and published on the intranet. By considering and responding to each idea submitted through the Suggestion Box, PA leadership and staff demonstrate their openness to innovative thinking and continuous improvement.	100% of the ideas responded to within 30 days	Quarterly
		Number of training sessions offered to staff on lean and business process improvement	15	Number of training sessions offered to staff on lean and business process improvement	Build capacity by training staff on lean and process improvement practices and tools, especially in preparation for small to large projects such as CRM and IPAS business process re-engineering.	One training session per year	Annually

Key Objective	Outcome	Key Performance Indicator	ID	Measure	Description	Target	Refresh Frequency
		<b>Staff survey</b>	<b>16</b>	Average staff survey agreement score	The key performance indicator measures staff agreement based on an annual survey among staff. This annual survey will help us ensure that we continue to foster a culture where engaging behaviours are part of our daily interactions and practices.	Increase in staff agreement score year on year	Annually
		<b>Percentage of staff performance reports completed</b>	<b>17</b>	% of staff performance reports completed	This key performance indicator measures the rate of completion of annual performance reports of PA staff by the deadline.	90% or above completed by the deadline	Annually
		<b>Number of staff induction training sessions offered</b>	<b>18.1</b>	Number of staff induction training sessions offered	This key performance indicator measures the number of half day induction sessions offered to new hires.	At least 1 training session offered per year	Annually
		<b>Percentage completion of mandatory training</b>	<b>18.2</b>	% Completion of mandatory training	This is a measure of the completion rate of mandatory training courses that are required for every employee at the Fund.	90% completed	Monthly
<b>Become a data-driven organization</b>	<b>Data-driven organization</b>	<b>Data Quality Score</b>	<b>19</b>	Data Quality Score, to be developed 2025	This key performance indicator measures the quality level of current data.	To be developed	Annually

Key Objective	Outcome	Key Performance Indicator	ID	Measure	Description	Target	Refresh Frequency
		Percentage of contributions reconciled on a monthly basis	20	% of contributions reconciled on a monthly basis	The Pension Administration (PA) ensures that participants' contributions are correctly reflected in their accounts. This measure is the percentage of participants' accounts reconciled monthly. The rate will be calculated by dividing the total number of participants' accounts reconciled monthly by the total number of (active) participants' accounts. The initiative to move from an annual to a monthly contribution reconciliation will be a joint project among 36 reporting entities, 25 member organizations, and the Interface Steering Group, which provides guidance on such initiatives.	90% of all participants' accounts are reconciled monthly (by 2030)	Annually
Innovate and leverage technology to improve services	Technology innovation and cybersecurity	Number of RPA and automation tools deployed	21	Number of RPA and automation tools deployed	This key performance indicator measures our efforts toward process automation to generate efficiencies. This is measured as the number of Robotic Process Automation (RPA) and other tools deployed (artificial intelligence, chatbots and intelligent document processing).	Four RPAs deployed per year	Annually
		Cybersecurity scorecard	22	Cybersecurity scorecard rating	This key performance indicator reflects PA security posture regarding the PA services exposed to the internet. The letter (A - F) and the numeric score (0-100) correspond to the likelihood of PA sustaining a breach. PA aligns with the industry standard for the Financial Services and Non-profit sectors. Reference: SecurityScorecard.com - Financial services Industry average: 89 (B) – Reference - Non-profit industry average: 89 (B) – Reference.	89 (B) or above	Monthly
Contribute to the Sustainable Development Goals	Sustainable development	Progress made towards reaching gender balance	23.1	Gender parity ratio across all staff	This key performance indicator measures our progress toward reaching gender balance at all levels as per the United Nations-wide Strategy on Gender Parity.	Improvement towards 50/50 gender parity year on year	Annually

Key Objective	Outcome	Key Performance Indicator	ID	Measure	Description	Target	Refresh Frequency
			23.2	Gender parity ratio across staff of levels Professional and above	This key performance indicator measures our progress toward reaching gender balance at all levels as per the United Nations-wide Strategy on Gender Parity.	Improvement towards 50/50 gender parity year on year	Annually
			24.1	Environmental sustainability improvement in building standards demonstrated	This measure is based on industry certification standards (e.g., LEED) to define minimum requirements related to the facilities. In terms of procurement, PA will rely on the UN standard contract terms and conditions that include sustainability criteria.	All facilities follow sustainable building standards	Annually



## Pillar 3 - Strengthen relationships with all stakeholders

Enhance trust, collaboration, and transparency

Key Objective	Outcome	Key Performance Indicator	ID	Measure	Description	Target	Refresh Frequency
Enhance trust between the Fund and other member organizations and other stakeholders	Open and transparent communication	Timely and accurate external reporting	25	% of annual reports, annual letters and financial statements delivered on time and with no material weaknesses reported by auditors	This key performance indicator measures how well the Pension Administration (PA) completes public information and reporting for stakeholders and clients in a timely manner, including annual reports, annual letters as well as financial statements with no material weaknesses reported by the external auditors.	100% timely delivery of annual reports, annual letters, and financial statements with, for the latter, no material weaknesses reported by the external auditors	Annually
		Regular interaction/ outreach with external stakeholders	26.1	Number of staff townhalls held	This key performance indicator measures our efforts to ensure regular communications and outreach with stakeholders to improve agility and maximize reach, response, and reputation while increasing operational efficiencies.	Four townhalls with all PA staff per year	Annually
			26.2	Number of client townhalls held	This key performance indicator measures our efforts to ensure regular communications and outreach with stakeholders to improve agility and maximize reach, response, and reputation while increasing operational efficiencies.	One townhall with all participants, retirees, and beneficiaries per year	Annually
			26.3	Number of SPC secretary meetings held	This key performance indicator measures our efforts to ensure regular communications and outreach with stakeholders to improve agility and maximize reach, response, and reputation while increasing operational efficiencies.	One meeting with all SPC secretaries per year	Annually

Key Objective	Outcome	Key Performance Indicator	ID	Measure	Description	Target	Refresh Frequency
Strengthen collaboration with partners and employing organizations	Member organization satisfaction		26.4	Number of UN family events held	This key performance indicator measures our efforts to ensure regular communications and outreach with stakeholders to improve agility and maximize reach, response, and reputation while increasing operational efficiencies.	One UN Family Event per year	Annually
			26.5	Number of individual meetings with Member Organizations	This key performance indicator measures our efforts to ensure regular communications and outreach with stakeholders to improve agility and maximize reach, response, and reputation while increasing operational efficiencies.	One individual meeting with each member organization per year	Annually
		Member organization satisfaction score	27	Member organization satisfaction score on a scale of 1 to 5	This key performance indicator measures our efforts to simplify and strengthen communications and outreach to our stakeholders, particularly the member organizations.	4 or above (on a scale of 5)	Annually
		Resolution time of member organization inquiries and service requests	28	Average resolution time of member organization inquiries and service requests	This measure is an assessment of our resolution of incoming member organization enquiries and service requests processed by the Operations Support Section (OSS). This measure defines the response time as the amount of time it takes OSS to respond and resolve incoming member organization enquiries and services requests. We measure response rates with designated service level targets.	80% of member organization inquiries and service requests resolved within 2 business days	Monthly





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