

Implementation of the C.A.R.E. Strategy (2024 and beyond)

July 2026



UNJSPF

United Nations Joint Staff Pension Fund

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Executive Summary

As of 30 June 2026, reported KPI results indicate that C.A.R.E. Strategy implementation remains on track overall, while several measures continue to mature and one client experience indicator remains under management watch. Pension Administration continues to deliver across its strategic focus areas despite a heavy operational workload and broader uncertainty related to the United Nations financial situation and the potential impact of UN80 reforms. Service delivery and modernization exceed targets, governance remains effective, and staff engagement is positive. Within this overall positive assessment, management will continue to monitor emerging risks, client feedback, and the implementation of remaining priority actions.

1. C.A.R.E. Strategy at a glance

The [C.A.R.E. Strategy](#) is the Pension Administration's framework for advancing its mission to provide retirement, death, disability and related benefits, and its vision of a service-oriented pension fund delivering high-quality services to clients globally. For 2024 and beyond, the Strategy is organized around three pillars: improving client experience, modernizing pension services, and strengthening relationships with all stakeholders. The Board-level KPI framework translates these pillars into five principal dimensions of PA performance for clearer Board oversight.

C.A.R.E. Strategy pillars	Performance dimensions	Board-level KPIs focus
Pillar 1: Improve client experience	Service delivery; client experience	Timely benefit delivery, payroll reliability, responsiveness and client satisfaction.
Pillar 2: Modernize pension services	Modernization	Digital adoption, automation, process improvement and investment in technology
Pillar 3: Strengthen stakeholder relationships	Governance; stakeholder engagement	Oversight, cybersecurity resilience, financial accountability, staff engagement and stakeholder outreach.

2. Reporting Approach and KPI Framework

Pension Administration has introduced a revised approach to the C.A.R.E. Strategy performance reporting. While the Strategy remains unchanged, the reporting framework focuses on a smaller set of strategic indicators to provide the Pension Board with a clear view of the principal dimensions of Pension Administration performance: service delivery, client experience, modernization, governance, and stakeholder engagement.

The framework is organized around a concise set of Board-level strategic KPIs. These indicators are intended to give the Board visibility on key results, risks, service outcomes and strategic progress. More detailed operational and diagnostic indicators remain part of management's internal monitoring framework and are used to track workflow, identify bottlenecks, support corrective action and drive continuous improvement. They will be brought to the Board's attention only where they signal a material issue, emerging risk or strategic decision point.

While the reporting framework has been simplified, the strategic goals remain the same. The objective is to provide clear Board visibility of strategic performance while preserving detailed operational oversight within management.

Previous reporting approach	Revised reporting approach
Reported the full C.A.R.E. KPI inventory, including 37 indicators	Presents a smaller set of Board-level KPIs
Combined strategic results with operational tracking	Separates Board oversight from management monitoring
Emphasized detailed implementation progress across the three pillars	Highlights outcomes, risks and issues requiring Board attention
Included supporting detail in the main Board package	Keeps operational detail available for escalation or follow-up

3. Implementation Status and Highlights

As of 30 June 2026, reported KPI results indicate that C.A.R.E. Strategy implementation remains on track overall, while several measures continue to mature and one client experience indicator

remains under management watch. Pension Administration continues to deliver across its strategic focus areas despite a heavy operational workload and broader uncertainty related to the United Nations financial situation and the potential impact of UN80 reforms. Service delivery and modernization exceed targets, governance remains effective, and staff engagement is positive. Within this overall positive assessment, management will continue to monitor the transaction survey results and implementation of remaining BOA recommendations.

Highlights for the period are summarized below.

- Service delivery remained strong. Benefit processing remained well above the revised 85% benchmark, with a June 2026 result of 96.8% and a January–June 2026 average of 97.3%. The benchmark was increased from the previous 75% target following the KPI review, reflecting sustained high performance and the objective of setting a more meaningful Board-level threshold for timely benefit processing.
- Client service outcomes also exceeded target levels, with an average resolution time of 1.35 business days for January–June 2026 and a June result of 2.04 business days, both within the four-business-day benchmark; first-contact resolution reached 68% in June.
- Modernization continued to progress, with digital certificate of entitlement (DCE) adoption reaching 61.86% of all beneficiaries, above the 60% stable-state target.
- Governance indicators remained positive, with 73% of prior BOA recommendations implemented.
- Financial accountability was confirmed through an unqualified audit opinion, with no financially material audit findings identified.
- Cybersecurity remained within the expected external security-rating range. The June 2026 score was on target at 89 and results were at or above benchmark throughout the period reviewed, reflecting an assessment of cybersecurity controls, processes and technologies aligned with recognized ISO security standards. A score of 89 falls within the “strong posture” range, typically around 86–100.
- Stakeholder relationships indicators were also positive. The 2026 C.A.R.E. Survey, taken by PA staff in June, showed an overall participation rate of 73% and an agreement score of 84% across questions on personal resilience, team collaboration, organizational support and openness to using AI.

3.1 Overall Assessment

Area	Assessment
Overall Strategy	On track
Board Decision Required	None
Strategic Risks Being Monitored	Client satisfaction monitoring; UN80 uncertainty; resource capacity; workforce sustainability; cybersecurity landscape; modernization dependency
KPIs Off Target	1: transaction satisfaction survey at 4.4/5 against target of 4.5/5
Major Achievements	Digital adoption exceeded target; benefit processing, payroll timeliness and staff engagement remained strong.

4. Board KPI Dashboard

The dashboard below summarizes the revised Board-level KPIs, reported using the most recent validated data available as of 30 June 2026 unless otherwise indicated.

Focus area	KPI	Target / benchmark	Current result	Status
Service Delivery	Benefit processing	>85% benchmarked benefits within 15 business days	96.8% in June; 97.3% for January–June as a whole	On track
Service Delivery	Payroll timeliness	100%	100% in June; maintained Jan–Jun	On track
Client Experience	Annual client satisfaction	$\geq 4/5$	Nov. 2025 global survey: 16,000+ responses; satisfaction index 4/5.	Pending 2026 annual survey results.
Client Experience	Transaction satisfaction survey	$\geq 4.5/5$	4.4/5	Watch
Client Experience	Average resolution time	Within 4 business days	2.04 business days in June; 1.35 days Jan–Jun average	On track
Client Experience	First-contact resolution	>60%	68% in June; above benchmark Jan–Jun	On track
Modernization	Digital certificate of entitlement adoption	60% digital / 40% paper	61.86% as of June	On track
Modernization	Process improvement and automation	Impact and benefits realized	26 process areas improved (Client Services, Financial Management and Payment processes reengineered as part	Under development

			of the ServiceNow and Oracle Fusion projects)	
Governance	BOA recommendations	Implemented within agreed timeframe	73% implemented during 2025-2026	On track
Governance	Cybersecurity score	≥ 89 external security-rating benchmark, aligned with ISO security standard	89 in June 2026	On track
Governance	Financial accountability	Unqualified audit opinion	No financially material audit findings identified.	On track
Stakeholder Relationships	Staff engagement	84% overall agreement score	84% agreement / 73% participation, June 2026 CARE survey	On track
Stakeholder Relationships	Townhall impact	$\geq 4/5$ plus impact statements	4.72/5 from 2025 pension townhall post-event surveys; broader impact methodology expected to be finalized during 2026	Under development

Note: “Watch” indicates an area requiring management attention and continued monitoring. It does not, on its own, indicate a material performance issue requiring Board action.

4.1 Notes on selected indicators

- **Transaction satisfaction survey:** Based on the case post-resolution survey issued upon case resolution in UNJSPF Connect. The current average customer satisfaction score is 4.4/5 against a 4.5/5 target, where 5 = Excellent, 4 = Good, 3 = Fair, 2 = Poor, and 1 = Bad.
- **Process improvement & Automation:** Measures the impact and benefits of process improvements and automation such as reduced manual handling, shorter cycle times, improved data quality, or increased self-service. The indicator remains under development while baselines and benefit-realization measures are finalized.
- **Townhall impact:** Pension townhall survey results exceed the $\geq 4/5$ benchmark in 2025; the measurement approach is being finalized to provide a fuller assessment of stakeholder engagement and outreach effectiveness.

5. Areas for Continued Management Attention

No matters requiring Board decision or separate escalation were identified during the reporting period. The areas outlined below relate to the implementation of the C.A.R.E. Strategy and

continue to be monitored by management as part of its regular performance oversight. Where relevant, associated mitigation measures are addressed through established operational controls and the Fund's risk management framework. Should any of these areas materially affect the delivery of the Strategy, management will bring them to the Board's attention as appropriate.

- UN80 uncertainty and potential effects on transaction volumes, workforce planning, and client demand.
- Resource capacity, including the ability to sustain service levels and strategic delivery within available staffing and budget constraints.
- Workforce sustainability, including the longer-term impact of sustained workload pressures on staff engagement, well-being, and readiness for change.
- Overall client satisfaction and client sentiment, particularly in light of increasing demand for information and services. Management continues to monitor client feedback closely, including the transaction survey, which remains marginally below the target.
- Cybersecurity posture and resilience, including the evolving threat landscape, third-party vulnerabilities, protection of sensitive participant data, safeguarding the integrity of financial transactions, and maintaining compliance with the Fund's fiduciary and security requirements. Continued vigilance is required to sustain performance at or above established benchmarks.
- Modernization delivery, including dependency on data quality, automation benefits, measurable process improvement and the IPAS upgrade, which will be the main focus in the short and medium term.

6. Key Performance Trends

The trend indicators below provide a concise year-on-year view of strategic performance. They are intended to show direction of travel rather than repeat the full KPI dashboard.

Area	2025	2026 (to date)	Trend
Benefit processing	96.5%	97.3%	Stable at high performance
Average resolution time	2.4 days	1.35 days	Improved and within benchmark
Digital adoption (DCE)	54.0%	61.9%	Improved
Staff engagement	82.0%	84.0%	Stable / slightly improved

These indicators show a positive or stable trajectory across service delivery, modernization, client service effectiveness and stakeholder relationships. This reinforces the overall assessment that implementation remains on track while identifying the areas that should remain under review for sustainability.

7. Key Performance Insights

Pillar 1 - Service delivery and client experience. Service delivery and client experience remain on track, supported by strong benefit processing, reliable payroll delivery and client service indicators within benchmark. As the Client Service Delivery Model continues to mature through UNJSPF Connect and expanded self-service capabilities, client feedback and service data will continue to inform improvements to the participant experience.

Pillar 2 - Modernization. The modernization of the Fund's systems and processes remains on track. Data cleansing processes are part of the PA continuous improvement process and a pre-condition of systems configurations. UNJSPF Connect now underpins the Client Service Delivery model and is being further optimized, while Oracle Fusion implementation continues to strengthen financial management and payment processes. Together, these initiatives have contributed to steady improvements in the Fund's strategic and operational KPIs since 2023. Further reporting on automation benefits and cycle-time reduction will strengthen the Board's view of the impact of modernization over time.

Pillar 3 – Governance and stakeholder relationships. Pillar 3 results remain positive across governance and oversight, cybersecurity resilience, financial accountability, staff engagement and stakeholder outreach. BOA recommendation implementation is progressing, financial accountability was confirmed through an unqualified audit opinion with no financially material audit findings identified, cybersecurity remains at benchmark, and the C.A.R.E. Survey reflects positive staff engagement despite workload pressures. Communications and outreach remain central to this pillar, with continued focus on effective collaboration with member organizations, stakeholder satisfaction, website and MSS user experience, and channel growth to support clear, timely and effective engagement.

8. Conclusion

Overall implementation of the C.A.R.E. Strategy remained on track during the reporting period, with no strategic issues requiring Board intervention identified. In the coming year, Pension Administration will focus on strengthening the measurement of modernization benefits, reviewing internal and external KPIs to ensure they remain current, relevant and aligned with strategic priorities



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