

Project Highlight Report

Pensions Board



Project Name:	Pensions Dashboard	Report Number:	004
Period	December 2024 to April 2025	Date Completed:	28/04/2025
Completed By:	Jake Glover Senior Pensions Project Officer		

TREND SINCE LAST REPORT	Green
CURRENT STATUS	Green
EXPECTED STATUS AT NEXT REVIEW	Green

Progress so far The following activities have taken place:	Planned work for next month and beyond Activities planned for May are:
<ul style="list-style-type: none"> • An ISP (Integrated Service Provider) has been procured and signed off by Legal. Implementation will commence January 2025 • Vicky, Pensions Admin Manager and Jake, Senior Pensions Project Officer to finalise documentation for the Member Data Tools procurement and instruct Procurement to upload these to Delta, the Council's online tender portal. • Risks, Issues and Decisions reviewed at November project catch-up. • Member Data Tools procurement exercise drawing to a close. Bids have been evaluated and chosen provider has been sent the contract award letter following no challenge from losing bidders. Heywood Pension Technologies are the winning provider. • Member Data Tools procurement exercise completed and the contract signed. Project kick-off call for mortality tracing was held 06/03/25. • ISP phase 1 implementation complete and UAT acceptance signed and returned 27/03/25. 	<ul style="list-style-type: none"> • Mortality tracing implementation continues with a period of UAT due to complete by the end of April. Internal calls to discuss the processes involved. • Mortality tracing project due to complete by late May 2025. • Address tracing will be the next module to look at once the Mortality project is complete.

Slippage and Remedial Action

- There was a delay in commencing the Mortality tracing project due to a delay with the contract being signed off and the kick-off call being booked in. Contact was made with our Heywood CRM.

Key Risks and Issues

R/I	Detail	Rating	Open / Closed
R	Data quality is low, leading to poor matching criteria and members having to contact the fund to find their pension (rather than finding it directly through the dashboards)	Low	Open
R	Procurement of new tracing and mortality screening provider (gap in service as current provider current ends in September)	Very Low	Closed
R	ISP connection deadline not met	Low	Open
R	Having adequate resource to deal with any additional work created	Medium	Open

High Level Milestones

Action	Date Completed / Target Date	Status	Comments
Procure ISP	19/08/2024	Complete	ISP procured and approved.
Data Tools Procurement	February 2025	Complete	Provider chosen and contract to be signed
Implement ISP Phase 1	January 2025	Complete	Kick-off meeting booked in with Heywood
Mortality Tracing	May 2025	On Track	