

# Project Highlight Report

## Pensions Committee



<b>Project Name:</b>	Pensions Dashboard	<b>Report Number:</b>	005
<b>Period</b>	June to August 2025	<b>Date Completed:</b>	01/09/2025
<b>Completed By:</b>	Jake Glover Senior Pensions Project Officer		

<b>TREND SINCE LAST REPORT</b>	<b>On Track</b>
<b>CURRENT STATUS</b>	<b>Green</b>
<b>EXPECTED STATUS AT NEXT REVIEW</b>	<b>Green</b>

<b>Progress so far</b> The following activities have taken place:	<b>Planned work for next month and beyond</b> Activities planned for June are:
<ul style="list-style-type: none"> <li>• An ISP (Integrated Service Provider) has been procured and signed off by Legal.</li> <li>• Monthly meetings are in place for the Pensions Admin Manager, Team Leaders, and Senior Pensions Project Officer.</li> <li>• Vicky and Jake have completed all the required invitations to tender documentation, and this has been released to providers.</li> <li>• Risks, Issues and Decisions reviewed at November project catch-up.</li> <li>• Member Data Tools Invitation to Further Competition to run until 28<sup>th</sup> November for providers to submit bids for each lot.</li> <li>• Review provider bids for Member Data Tools and carry out scoring. Contract to be awarded on 18/12/24.</li> <li>• Contract awarded to Heywood Pension Technologies for the data tools software.</li> <li>• ISP DPIA reviewed and signed off by Information Governance.</li> <li>• Complete User Acceptance Testing (UAT) for phase 1 implementation of the ISP.</li> <li>• UAT acceptance issued and signed off.</li> <li>• Project kick-off call booked for 6<sup>th</sup> March for the Data Tools implementation project.</li> <li>• Implementation study issued for Mortality Screening, signed and returned.</li> <li>• Mortality Screening testing is completed, and a meeting to be booked with Heywood to discuss the next steps for the project.</li> </ul>	<ul style="list-style-type: none"> <li>• Next data upload for Mortality Tracing will be carried out post 25.3 Release but ahead of the 31/10/25 connection date.</li> <li>• Address tracing will be the next project to look at around September/October.</li> <li>• Bank Account Verification to be looked at implementing in September. Meeting with Team Leaders 13/08/25 to discuss. Will request that Heywood switch this on in Test and M&amp;B team will carry out some testing. Procedure notes will need to be amended.</li> <li>• Decide on Find Data and document this in a policy following the first address tracing exercise.</li> </ul>

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**Shropshire  
County  
Pension Fund**

- Mortality Tracing go live was delayed on the Heywood side and some extra workflow needed to be put in place for Status 9 records. Went live on 04/06/25.
- ISP Phase 2 kick-off call booked in for 16/07/25. The questionnaire and connection template completed and sent back to Heywood ahead of the call.
- ISP Phase 2 implementation completed, and connection confirmation signed and returned. Project closure call held 07/08/25.
- AVC template has been shared with Heywood, awaiting a response re costings.

### Slippage and Remedial Action

- ~~Mortality screening delayed due to staff shortages at Heywood; this has delayed implementation of address tracing as we have now hit the valuation project which the team need to focus on.~~
- ~~After escalating this with CRM eventually went live 4 June 2025.~~
- N/A - no project slippage this month

### Key Risks and Issues

R/I	Detail	Rating	Open / Closed
R	Suitable ISP is not obtained and so can not connect to dashboard	Very Low	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
I	Decide on implementation dates	N/A	Closed
I	How do we resource queries from Dashboard to reduce the team being overwhelmed and to meet required timescales	N/A	Open
I	What to use for Find Data and how AVC information will be accessed	Medium	Open
R	ISP connection deadline not met	Low	Closed
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	Procurement complete and contract awarded
ISP UAT	March 2025	Complete	UAT acceptance issued and signed off
Mortality Screening	June 2025	Complete	Module went live following a delay on the Heywood side
Data Tools Implementation	April/May 2025	On Track	Address Tracing to commence from Sept/Oct
ISP Phase 2	July/August 2025	Complete	