Project Highlight Report
Pensions Board

Shropshire County Pension Fund

Project Name:	Pensions Dashboard	Report Number:	005
Period	April 2025 to December 2025	Date Completed:	06/01/2026
Completed By:	Jake Glover Senior Pensions Project Officer		

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

Previous progress	Progress made this period
- An ISP (Integrated Service Provider) has been procured and signed off by Legal. - Monthly meetings are in place for the Pensions Admin Manager, Team Leaders, and Senior Pensions Project Officer. - Vicky and Jake have completed all the required invitations to tender documentation, and this has been released to providers. - Risks, Issues and Decisions reviewed at November project catch-up. - Member Data Tools Invitation to Further Competition to run until 28th November for providers to submit bids for each lot. - Review provider bids for Member Data Tools and carry out scoring. Contract to be awarded on 18/12/24. - Contract awarded to Heywood Pension Technologies for the data tools software. - ISP DPIA reviewed and signed off by Information Governance. - Complete User Acceptance Testing (UAT) for phase 1 implementation of the ISP. - UAT acceptance issued and signed off. - Project kick-off call booked for 6th March for the Data Tools implementation project. - Implementation study issued for Mortality Screening, signed and returned.	- 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. - First mortality tracing completed. - Bank Account Verification is in Live however there are issues with the number of errors and referrals. This has been fed back to Heywood and another fund has been contacted. - Address tracing kick-off call was booked for 12th November with Heywood. - AVC single source data: **Upmost** have sent across an encrypted file which has been checked and confirmed. This will be sent annually. **Prudential** have sent across a test file through their Secure File Transfer Protocol (SFTP). This has all been setup and members of the Systems team are able to access this. - Heywood have finalised testing on their AVC interface for Altair having discovered issues with the Managed File Transfer (MFT) for AVC uploads. This has been deployed to Altair Test (07/11/25) with a handover email containing information required. The Systems team will ensure it is working prior to it being deployed to Altair Live.

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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.~~ • Implementing the Address Tracing module and the AVC interface have been delayed due to Heywood staffing pressures and not as a result of any delays/issues within the Fund.

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

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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	Complete	Address Tracing to commence November – delayed due to staff pressures at Heywood working on the ISP
ISP Phase 2	July/August 2025	Complete	
AVC Single Source	October/November 2025	Slipping	Implementation dates slipped due to issues with the Heywood Altair interface