Project Highlight Report
Pensions Committee

Shropshire County Pension Fund

Project Name:	Pensions Dashboard	Report Number:	007
Period	November 2025 to February 2026	Date Completed:	02/03/2026
Completed By:	Jake Glover Senior Pensions Project Officer		

TREND SINCE LAST REPORT	On Track
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. - Mortality Screening testing is completed, and a meeting to be booked with Heywood to discuss the next steps for the project.	- AVC process has now been tested end to end from receiving a file from Prudential to uploading and viewing in Altair. Small issue with regards the date format in the Prudential file however, Systems team found a simple fix for this. - All the testing has been completed for the address tracing and we're waiting on a date for it to go into live. We've had a call with Heywood to clarify the filtering on the Insights reports to get the High matches. Decisions need to be made on what to do with these with regards to a letter to the member. Further decisions to be made on medium matches but low matches will be ignored - so rejected. However, the data for rejected cases still stays on a data view on the records so this is being raised with Heywood. Only High matches will update the address data view.

- 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.
- 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 has been 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.

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.~~
- ~~Continued delays with the AVC interface in Altair as Heywood are investigating some issues.~~
- Delays with Address Tracing continue and working with Heywood to resolve the issues.

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

Project Highlight Report
Pensions Committee

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
I	Delays with the AVC interface	Medium	Closed
I	Delays with Address Tracing implementation	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

Project Highlight Report
Pensions Committee

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	
Single Source File connection with Prudential	September/ October 2025	Complete	Connection made to the Prudential SFTP and test file gained
Single Source Solution Testing with Heywood	September/ October 2025	Slipping	Implementation dates slipped due to issues with the Heywood Altair interface. AVC solution now in place in Altair Test however, issues being investigated by Heywood so not yet deployed to Live.
Address Tracing	January/February 2026	Complete	Tested end to end with one issue that has been resolved.
Dashboard Policy	September/ October 2025	On Track	This will be looked at once Martin starts in January. Matching criteria decided and agreed on.
Bank Account Verification	September 2025	Complete	