Progress on Key Admin Projects Related to Service Plan

Item	Details	Action by Fund / Next Steps
Pensions Dashboards Project	**KEY AIMS:** The Fund must comply with the Pensions Dashboard Regulations 2022, (amended August 23) following guidance issued by the Pensions Dashboard Programme, TPR and PASA with the purpose of connecting to the Dashboard ecosystem by the revised deadline of 31/10/26. *Funds will need to connect prior to that date within connection windows (to be supplied in guidance following industry consultation).* In preparation, the Fund must become compliant with the Standards set out by the Pensions Dashboard Programme and complete our own reviews and projects in advance of our deadline, to connect and remain connected to the Dashboard ecosystem. This will include: • The engagement of an Integrated Service Provider to enable connection. Review and agreement of responsibilities and revision of contract with ISP. Connection testing prior to onboarding. • Providing evidence of compliance with all PDP Standards and connection criteria (further compliance criteria and guidance to be published) to the TPR prior to registration and connection. • Backlog minimization, data cleansing and reduction of refund liability as recommended by the PDP. • Completion of data-centric projects • Ensuring BAU admin processes are sufficient to maintain minimal backlog and accurate data quality prior to and following connection. • Increased use of digital and automated processes. • Preparedness for increased admin traffic once Dashboard goes public. • Advance communications with our membership re. Dashboards via website, newsletter etc.	**Work completed and in progress** • Published Regulations, bulletins from the PDP, LGA, TPR, Heywood and other pensions bodies are analysed along with issued Regulations, Guidance, Calls for Input and Consultation documents, which are responded to. All webinars attended and Heywood are contacted with any current queries. • Data-centric projects affecting Dashboard compliance identified and monitored centrally to ensure completion in advance of Dashboard connection. • Heywoods ISP solution with scheme data reporting will be available once contract is signed. The draft contract and terms of service provision are currently under review. • To become and remain compliant, ongoing member data cleansing is required to ensure data is not only present but correct. Heywoods provision of an integrated data cleansing service is being reviewed with further 3rd party options to be investigated Autumn 23. • Reducing backlogs is a key factor in becoming and remaining compliant. Lead officer is working with Member and Digital Services to address backlogs. Training timetable and cross-team working now in place for Autumn/Winter 23. • Steps to ensure correct levels of resource, support for BAU and annual bulk run events are being worked on under the restructure project. Future budget/staffing consideration: Member-facing staff will face a high increase of administration when the Dashboard goes live. • Work is ongoing with L&G re. reporting on member matching data. Reports will be provided quarterly. • Movement of our fire admin to West Yorkshire will remove firefighter members from the Dashboard project.