

# The Pensions Dashboard

Preparing to Connect

Avon  
Pension  
Fund



Your pension, your future

# Agenda



- What is the Pensions Dashboard
- Governance
- What does this mean for APF
- What have we done and are we doing to ensure compliance

# What is the Pensions Dashboard



- The Government's aim is that online Pensions Dashboards will match users with all their pensions yet to be brought into payment, in one place and in a secure way.
- Members personal details will be verified within a complex "ecosystem" and details of their pension schemes and pension benefits will be fed back from our system and be available to view on a dashboard.
- Use members Annual Benefit Statement (ABS) data
- The data will be presented in a simple and understandable way
- <https://youtu.be/o27-R-EkmR8>

# DWP Connection Deadline dates

- The Pensions Dashboards (Amendment) Regulations 2023 removed the staging profile and introduced a single connection deadline of 31 October 2026.
- DWP published guidance on **25 March 2024** containing a revised timetable which staggers the connection of 16 cohorts of large and medium schemes and providers to the digital architecture.

## 'CONNECT BY' DEADLINES

**30/04/2025**

Money Purchase Master Trusts  
with 20K + members

**31/05/2025**

DB SCHEMES - Other than  
public service schemes with  
20K + members

**31/10/2025**

**ALL PUBLIC SERVICE PENSION SCHEMES**

ALL OTHER RELEVANT OCCUPATIONAL  
SCHEMES with 100-999 members

Monthly rolling 'connect by' dates  
between 1 Jan and 31 Oct 2026

**31/10/2026**

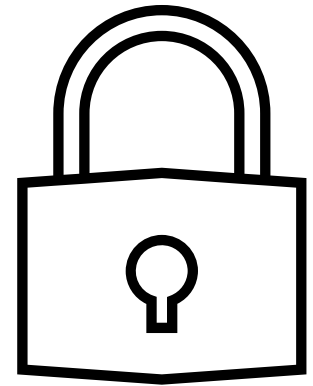


# The Pension Regulator Guidance

**TPR will be responsible for ensuring we comply with the duties of the dashboard**

We must be able to evidence:

- Having regard for our “connect by” date
- Appropriate Governance, processes and systems in place
- Key decisions and progress recorded



# TPR Guidance – what must we be doing now?

<b>Guidance</b>	<ul style="list-style-type: none"><li>• Ensure we understand our dashboard duties</li><li>• Know what is needed to prepare</li></ul>
<b>Decide how to connect</b>	<ul style="list-style-type: none"><li>• Review options</li><li>• Current provider/Integrated Service Provider/Build your own</li></ul>
<b>Communication</b>	<ul style="list-style-type: none"><li>• Raise awareness with teams</li><li>• Keep stakeholders informed</li><li>• Include on the agenda for Board &amp; Committee</li></ul>
<b>Data Accuracy</b>	<ul style="list-style-type: none"><li>• Review your data to ensure:</li><li>• We can match members with their pension</li><li>• Return accurate data values</li></ul>

# TPR Compliance & Enforcement approach

- Principle based
- Data led
- Will have a range of powers
- Will be pragmatic but robust where they see intentional non-compliance

# PASA\* Guidance

## What are the main components of a scheme being connection ready?

These are the key pillars which need to be addressed to achieve connection readiness:

### 1. GOVERNANCE READINESS

A project plan is in place to deliver connection & the relevant stakeholders are engaged

### 2. MATCHING READINESS

Ready for find requests at scale, due to significant usage of dashboards

### 3. PENSIONS VALUES READINESS

Ready to provide view data at scale, due to significant usage of dashboards

### 4. TECHNOLOGY READINESS

The administrator has the scheme tested & running on its "Provider Connection Technology (ISP)

### 5. ADMINISTRATION READINESS

Business processes are in place to deal with queries, ongoing changes & impacts on BAU resulting from dashboards connection



# **APF – Governance readiness**



- Appointed a Project Manager
- Project plan for delivery and connection
- Education of Management team

Next steps:

- Ongoing monitoring of progress & Compliance
- Ongoing communication with officers, employers, Board & Committee
- Delivery ISP and connect October 2025

# APF - Matching Readiness



- Understand “data find criteria”
- Member data reporting & assessment
- Tracing “Gone Away” members
- Working with AVC provide

## Next Steps:

- Appoint training agency supplier
  - Decide Matching data criteria
  - Ongoing data cleansing
  - Ongoing member tracing
  - **Matching Readiness Statement**
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# APF – Pension Value Readiness



- Understand the “Data View” criteria
- Data reporting, reviewing & monitoring
- Plan to reducing backlogs and Status 2 records
- Ensuring pension values (ABS) are correct

## Next Steps

- Ongoing data cleansing
- Plan for increased workflow as a result of non-data returns
- **Implementation Statement**

# APF – Technology Readiness

- Review Integrated Service Providers
- Started procurement via LGPS framework

## Next Steps:

- Appoint & Implement ISP
- Installation
- Pre and post install testing
- Reporting from Dashboard
- **Implementation Statement**

# APF – Administration Readiness

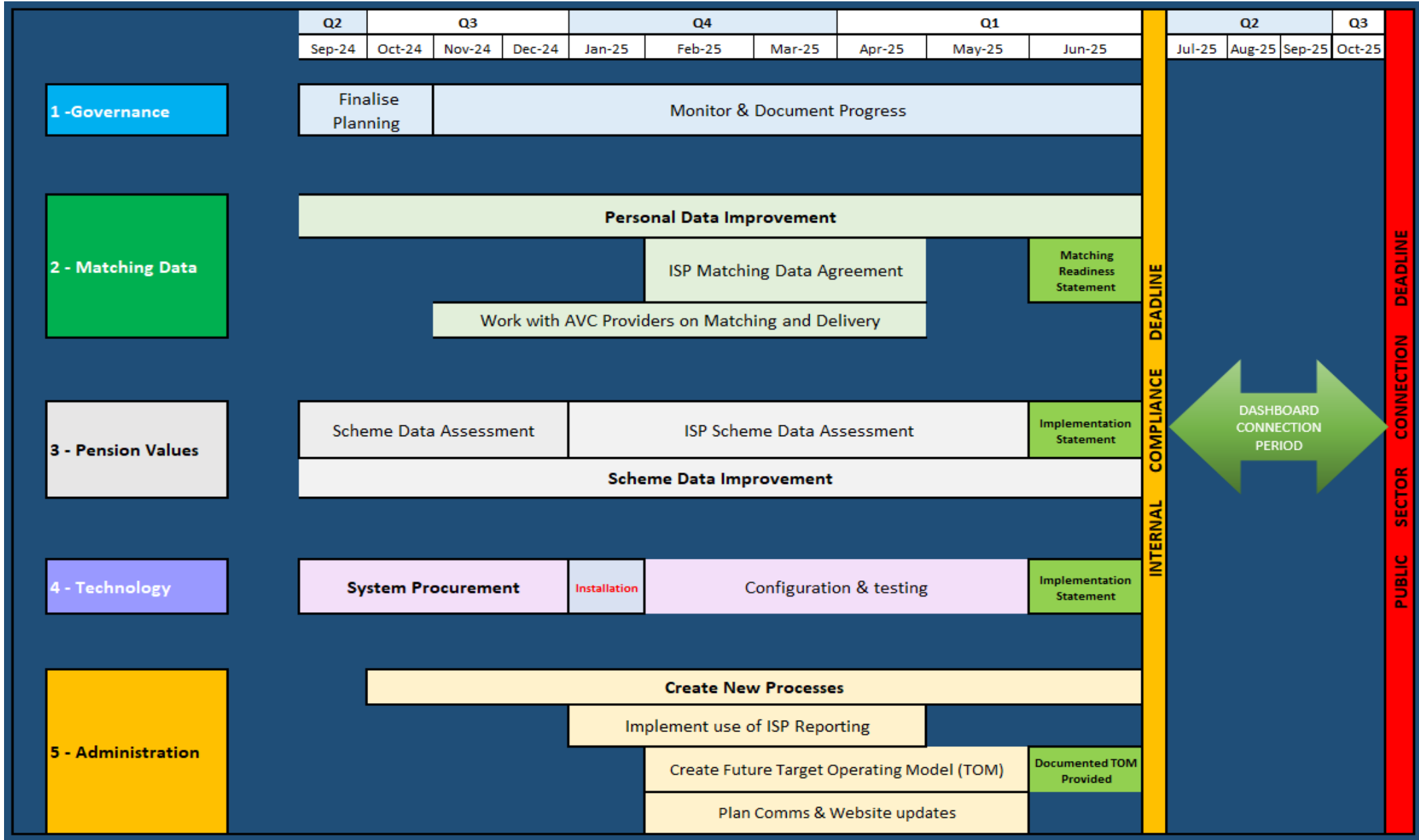


- Process review
- Resource planning

## Next Steps:

- Define new processes
- Officer training
- Integration with Member Website
- **Target Operating Model Statement**

# Plan Overview: Sept 24 to Oct 25



# Thank you



If you have any questions please contact:

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