



**Trustee & Administrator Engagement Focus Group**

**The Trustee Administrator Lifecycle Series**

**Part 1 – Why Trustee-Administrator Relationships Matter**

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**PASA** 

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## Part 1 – Why Trustee-Administrator Relationships Matter

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### The Trustee–Administrator Lifecycle Series

Strong trustee–administrator relationships are built deliberately — through clarity, transparency and shared understanding.

This four-part series explores the lifecycle of the relationship:

1. Why the relationship matters
2. Appointing a new administrator
3. Managing installation and transition
4. Building and maintaining an effective partnership

## 1. Background

Since PASA was established 15 years ago, pension administration has increasingly been recognised in principle by trustees, sponsors and the Pensions Regulator (TPR) as a critical component of the pensions system. However, in practice, this importance hasn't always been fully reflected.

Pension administrators operate at the frontline of the industry, supporting members at key and often vulnerable moments in their lives. Yet administration has historically been positioned as a supporting function or priced as a loss leader. This has limited sustained investment and contributed over time to accumulated technical, technological and resourcing challenges.

To address this challenge, in late 2024 and early 2025 PASA convened roundtables with leading professional trustee firms and met with TPR. These discussions supported improvement but sought clarity on the administration community's 'asks'. This led to the creation of the PASA Trustee & Administrator Engagement Focus Group (TEFG).

The Group's objectives are to define current realities, future ambitions, challenges and priorities and to explore how relationships can be transformed. The Group has developed this initial Guidance and associated training frameworks for wider industry and regulatory discussion.

## 2. Why Trustee-Administrator Relationships Matter

The relationship between trustees and administrators is crucial to delivering successful outcomes for everyone involved.

**Administration is where governance becomes reality**

When a scheme is managed effectively:

- Regulatory requirements are met
- Data is reliable
- Members receive the correct benefits
- Trustees and sponsors face no surprises during transformational events such as buy-in, consolidation, winding-up or transferring between administrators

The legal obligation to pay the right person, the right amount, at the right time sits with the trustees. Whether running on or buying out, it's a trustee duty to have an accurate view of liabilities. The soundness of advice they receive will depend on the quality of the data and information provided by administrators and advisers.

At the same time, administration services are under significant pressure. Business as usual (BAU) activity continues alongside substantial projects such as:

- GMP Equalisation (GMPE)
- Dashboards
- DC consolidation
- Guided retirement
- Risk transfer activity

This is occurring at a time when the pool of experienced administration talent is reducing.

Strong, productive relationships are built on clarity, open communication and mutual trust. This will enable trustees to manage their schemes proactively and make the best use of their advisers and service partners.

In this context, effective oversight of administration is a core governance responsibility.

**Effective administration oversight is fundamental to trustee accountability**

### **3. Purpose of this Guidance**

This Guidance is intended to support trustees in working effectively with their administrators.

It promotes:

- Shared understanding of administration delivery
- Clearer reporting
- Greater awareness of operational challenges faced by administration service providers

This Guidance is drafted to reflect the stages of the trustee-administrator relationship, from appointing a new administrator through to managing difficult situations and, in some cases, addressing relationships which have become strained and/or unproductive.

It's relevant to all types of trustees, including professional, employer-nominated and member-nominated trustees and applies to trust-based schemes of any size or complexity. The term 'trustee' is universally applicable in this Guidance, covering all types of pension scheme trustee within any legal framework.

This Guidance is intended to support trustees in working effectively and transparently with their administrators, promoting shared understanding of administration delivery, reporting and the operational

challenges faced by administration service providers. It will help those trustees who are administration experts to engage more fully themselves. Where trustees don't have the necessary administration expertise, or would benefit from some specialist support, there are expert administration consultancies available to assist. Some trustees may benefit from having additional support alongside them in discussions with their administration partner.

#### **4. Proportionate Adoption**

Strong and productive relationships are built on clarity, open communication and mutual trust.

Trustee boards operate from different starting points with varying levels of resource. A proportionate approach to adoption may therefore be appropriate, focusing initially on core elements before developing more advanced practice.

This series is accompanied by practical tools and examples, including:

- Case studies illustrating different types of trustee-administrator relationships
- A suggested Balanced Scorecard to support performance measurement

**Strong partnerships are built on clarity, transparency and shared understanding**

This part sets the context for the lifecycle approach explored throughout the series. Subsequent parts examine appointment, transition and the development of sustainable, high-quality trustee-administrator partnerships.



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