Trustee & Administrator Engagement Focus Group

The Trustee Administrator Lifecycle Series

Part 3 – Managing Installation and Transition

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PASA

Acknowledgements

Managing Installation and Transition

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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. Introduction

Following the appointment of a new administrator, attention turns to the installation phase. This period is critical in establishing the operational foundations of the relationship and ensuring a smooth transition of services.

This Part of the series explores the considerations trustees may wish to address during installation, including transition planning, data migration, governance arrangements and member communications.

2. The Installation Phase

Administration capability, resource and data quality are pivotal to the member experience and to trustees' ability to pay the correct benefits and deliver projects effectively. A clear and robust installation process is essential, with timeframes and fees proportionate to the risk and complexity of the transition.

It's neither necessary nor realistic for all automation, data cleansing, benefit audit and specification work to be fully complete at the point of transition. Instead, trustees and administrators should jointly identify and document known risks, priorities and opportunities for improvement, agreeing how these will be managed and assessed over time. This shared understanding should be reflected in the trustees' risk register and business plan, supporting continuous improvement and effective governance.

Early Installation Planning

Trustees should consider arranging a site visit shortly after the appointment of the new administrator is confirmed and the service agreement signed, even if a visit took place during the market review process. This gives an opportunity for trustees (or the administration committee, where one exists) to meet the wider delivery team in a more relaxed environment and to start building an effective working relationship.

Trustees should share relevant historical information, including work volumes, known issues, cyclical activity, and employer-specific requirements to support the new administrator in developing realistic and well-informed installation plans.

Arrangements should also be agreed with the ceding administrator to ensure service continuity up to the handover point. Where a TUPE transfer is anticipated, consideration should be given to retaining sufficient resource to complete post-transition close down activities, such as HMRC reporting.

Early agreement should be reached on key contacts on both sides, the frequency and format of meetings during the installation phase and the scope of the project plan to be managed by the administrators through to the agreed go-live date.

Trustees should also invite administrators to set out what they need from the trustees to operate efficiently and to support an open, transparent and effective relationship from the outset.

A detailed project plan should be requested covering milestones, responsibilities, dependencies and contingency arrangements. Adequate time should be allowed for the installation, recognising overly compressed timescales can create avoidable risks later.

The timing and content of member communications relating to the change of administrator, including contact details and changes to service, should be agreed at an early stage.

Trustee Considerations During Installation

Trustees may wish to explore the following areas as part of their oversight of the installation:

✓ **Data migration and validation**

What protocols and checks are in place to ensure data is transferred accurately and completely?

✓ **Benefit specification**

How has the benefit specification been established and approved, and how will it be maintained? What steps have been taken to validate it against administration processes, scheme governing documentation and legislative requirements?

✓ **Understanding legacy processes**

What level of understanding has been gained of the ceding administrator's processes, including how data gaps, manual calculation and information held outside the main database have been managed?

✓ **Knowledge management**

How will the knowledge library be reviewed, maintained and kept up to date?

✓ **Reconciliation and data checks**

What reconciliation and validation exercises will be undertaken as part of the installation?

✓ **Calculation assurance**

What testing or audit will be undertaken of the calculation pro forma and automated routines?

✓ **Historical exercises**

What reviews or audits will be undertaken in relation to historical pension increases, lifestyling and other similar bulk events?

✓ **Service continuity and member experience**

What arrangements need to be made for service continuity and is there any change to online access or functionality for members?

✓ **Member communications**

What arrangements will be made to keep members informed of the changes, who to contact and when, whether there will be any blackout periods preventing access to any services, etc?

✓ **Delegated authorities**

What trustee discretions might be delegated to support efficient administration and a positive member experience? The installation phase can be an appropriate point to review delegated authorities, for example in relation to certain early retirements, transfers close to normal retirement age, or the treatment of small overpayments. Any delegation should be considered carefully and be appropriate to the scheme's circumstances

Where trustee discretions apply, a Discretions Policy should be maintained to promote consistency of approach, while preserving the trustees' ability to depart from usual practice if circumstances warrant it.

At the conclusion of the installation, trustees should expect a final implementation report summarising work completed and assurance activities undertaken, together with details of any items to be completed post go-live and any ongoing data cleansing or improvement activity identified.

3. Looking Ahead

A well-managed installation phase establishes the operational foundations of the trustee–administrator relationship and supports effective long-term service delivery.

Part 4 of the series explores how trustees and administrators can build and maintain a strong and productive relationship over time.

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