



**Trustee & Administrator Engagement Focus Group**  
**The Trustee Administrator Lifecycle Series**  
**Trustee–Administrator Oversight Scorecard**

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**PASA** 

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## Trustee–Administrator Oversight Scorecard

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## 1. Using the Oversight Scorecard

This Scorecard provides a structured framework to support trustee oversight of administration performance. It covers four key perspectives: financial, stakeholder, internal processes and learning & growth.

It can be adapted to reflect the size, complexity and priorities of individual schemes, with trustees selecting the measures most relevant to their needs.



### Financial Perspective

**OBJECTIVE: Control administration costs without compromising BAU or project service quality**

- A.** BAU administration costs variance against budget (%) based on expected transaction levels for the core work
  - Target:  $\pm 5\%$  of approved annual budget
  - Target: Any excess transaction fees which means overall annual fees outside of this range from the budget should be fully evidenced and justifiable
- B.** Approved project delivery budget, based on agreed scope of work
  - Target: To deliver on budget, subject to any changes appropriately agreed via approved change controls
- C.** Project variance against budget (£)
  - Target: Any variance from budget should be based on agreed change controls or should have been justified and signed off by the trustee ahead of being incurred.
- D.** Service delivering Value for Money
  - Target: Costs are broadly in line with (maybe  $\pm 10\%$ ) market expectations for the size and complexity of scheme, when considering the quality of service and scope of work performed



### Stakeholder (Trustee) Perspective

**OBJECTIVE: Achieve high trustee and member satisfaction**

- A.** Trustee satisfaction score (survey out of 10)
  - Target:  $\geq 8.5/10$
- B.** Number of complaints escalated to The Pensions Ombudsman
  - Target: Zero
- C.** Project delivery trustee satisfaction
  - Target: Project completed within timescale without error



## Internal Processes Perspective

**OBJECTIVE: Ensure timely and accurate processing of transactions**

- A. On-time and accurate benefit payments (%)
  - Target: 100%
- B. Data accuracy rate (% of records error-free)
  - Target:  $\geq 99.5\%$
- C. System uptime (%)
  - Target:  $\geq 99.8\%$  monthly
- D. Regulatory compliance incidents
  - Target: Zero material breaches



## Learning & Growth Perspective

**OBJECTIVE: Maintain a skilled, knowledgeable administration team**

- A. Staff training hours per FTE per year
  - Target:  $\geq 20$  hours

## 2. Example Oversight Scorecard (Summary View)

The example below illustrates how a Scorecard might be structured in practice. Trustees may adapt the measures, targets and reporting frequency to reflect their scheme.

Perspective	Objective	KPI	Target	Frequency	Owner
Financial	Adherence to budget	Budget variance (%)	± 5%	Quarterly	Finance Lead
Financial	Transaction costs justified	Budget variance (%)	Excess budget all approved	Quarterly	Finance Lead
Financial	Adherence to Project budget	Budget variance (%)	On budget	Quarterly	Finance Lead
Financial	Scope changes to projects	Budget variance (%)	Excess budget all approved	Quarterly	Finance Lead
Stakeholder	Trustee satisfaction	Trustee survey score (0–10)	≥ 8.5/10	Annually	Trustee Secretary
Stakeholder	Trustee satisfaction	Project delivery	Within timescale no errors	Quarterly	Ops Manager
Stakeholder	Member service	Inquiry resolution time (days)	≤ 5 working days	Monthly	Member Services
Stakeholder	Regulatory escalations	Complaints to TPR (count)	0	Quarterly	Compliance Manager
Internal Processes	Benefit payment accuracy & timeliness	On-time payment rate (%)	100%	Monthly	Ops Manager
Internal Processes	Data integrity	Record accuracy rate (%)	≥ 99.5%	Quarterly	Data Governance
Internal Processes	IT stability	System uptime (%)	≥ 99.8% monthly	Monthly	IT Lead
Internal Processes	Compliance	Material breaches (count)	0	Quarterly	Compliance Manager
Learning & Growth	Team capability	Training hours per FTE	≥ 20 hrs/FTE/yr	Annually	HR Manager
Learning & Growth	Professional accreditation	Certified staff (%)	≥ 75%	Annually	HR Manager
Learning & Growth	Continuous improvement	System enhancements delivered (count)	≥ 4 major projects/yr	Annually	IT Lead



Get in touch:

[info@pasa-uk.com](mailto:info@pasa-uk.com)

[www.pasa-uk.com](http://www.pasa-uk.com)