Shaping the Future of Pensions Administration

Strategy 2026-2030

May 2026

PASA

Contents

PASA Strategy 2026 – 2030

PASA will build on its strong foundations to play a more visible and influential role in shaping pensions administration, policy and standards, with a clear and measurable focus on improving member outcomes.

1. Purpose

This document sets out PASA's strategic direction for 2026-2030, including the priorities, delivery framework and governance approach supporting successful implementation.

PASA enters this period from a position of strength, with an established reputation, strong outputs and trusted relationships across the industry. The focus of this strategy is to build on this foundation to increase impact, influence and engagement in support of improved outcomes for scheme members.

For the purposes of this strategy, 'member outcomes' refers to the quality, clarity and timeliness of services, communications and support experienced by scheme members in helping them better understand, manage and make decisions about their pensions.

> Strong administration is one of the most direct routes to better member outcomes and PASA's role is to support and promote the standards, capability and collaboration needed to achieve this.

2. Strategic Direction

To remain both responsive and forward-looking, PASA will:

- **Act** with greater authority and visibility across pensions administration
- **Champion** and shape improved outcomes for scheme members
- **Strengthen** recognition of pensions administration as a trusted and respected profession

3. Strategic Pillars

PASA's activity will be focused across six priority areas:

1. Member Outcomes and Value
2. Policy Influence and Regulatory Leadership
3. Standards, Data, Technology and industry Resilience
4. Content, Communication and Digital Transformation
5. Community Engagement, Professional Recognition and Membership Growth
6. Effective governance and delivery

4. Delivery Timeframes

Year 1 (2026): Focus, Define and Align

Year 1 will focus on strengthening foundations, clarifying roles and defining future delivery, alongside continued delivery of PASA's existing activities, working groups, guidance and events programme.

Key Actions:

- Develop and implement a Board and Executive Agreement of Responsibilities, clearly defining roles, decision-making authority and accountability
- Formalise PASA's policy engagement model and build on existing leadership through structured engagement with regulators and government
- Undertake a discovery and specification phase for website and content transformation, informed by best practice
- Define PASA's position on AI, data and emerging technologies, including establishing a clear role in shaping data standards
- Simplify and align working group structures to support effective delivery and clearer accountability
- Expand engagement within member organisations beyond primary contacts through broader role-based participation and targeted engagement channels
- Consolidate and strengthen existing collaboration with industry bodies

Years 2–3 (2027–2028): Deliver and Expand

Years 2–3 will focus on implementing and scaling activity defined in Year 1.

Key Actions:

- Deliver website and content transformation and expand digital engagement channels
- Deepen PASA's role in policy development, with earlier and more consistent engagement
- Lead or co-lead industry initiatives to define and promote data standards
- Expand structured engagement across member organisations and develop targeted engagement channels
- Undertake a membership value proposition review including benefits, structure and positioning
- Refresh Membership Committee leadership and structure to support future delivery
- Build on existing collaboration with industry bodies to increase collective impact

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Years 4–5 (2029–2030): Lead and Evidence Impact

Years 4–5 will focus on demonstrating impact and sustaining leadership.

Outcomes:

- PASA's influence clearly evidenced in policy, regulation and industry practice
- Recognised leadership in standards, data and emerging technologies
- High levels of engagement across a broad and representative membership base
- Demonstrable improvement in member outcomes across the industry
- Strong, accessible and widely used content and engagement platforms
- Greater recognition of pensions administration as a trusted and respected profession across the industry

	Pillar 1 Member Outcomes & Value	Pillar 2 Policy Influence and Leadership	Pillar 3 Standards, Data, Technology & Resilience	Pillar 4 Content & Digital Experience	Pillar 5 Engagement, Community & Growth	Pillar 6 Effective Governance & Delivery
Year 1 (2026) Focus, Define and Align	Define outcomes through Standards and Accreditation	Formalise policy engagement	Define position on AI and data standards	Specify content and digital strategy	Expand engagement within member organisations	Align governance and responsibilities
Years 2–3 (2027–2028) Deliver and Expand	Increase adoption as benchmarks	Deepen policy influence	Lead industry initiatives	Deliver transformation and expand channels	Develop targeted engagement channels	Strengthen coordination and processes
Years 4–5 (2029–2030) Lead and evidence impact	Evidence improved outcomes	Evidence impact on policy	Recognised leadership	High-impact, widely used content	Sustained high quality engagement	Consistently high-impact delivery

Each phase builds on the last, ensuring PASA strengthens its foundations, scales its impact and demonstrates clear value for members and the pensions administration industry.

5. Pillars and Objectives

Pillar 1: Member Outcomes and Value

Champion improved member outcomes by building on PASA’s established Standards and Accreditation framework and strengthening how outcomes are defined, evidenced and promoted.

Year 1	Years 2–3	Years 4–5
Build on PASA's Standards and Accreditation to define and articulate member outcomes	Increase adoption and recognition of PASA's Standards and Accreditation as industry benchmarks for quality and member outcomes	Evidence improved member outcomes, with PASA recognised as a driver of quality across the industry

Pillar 2: Influence and Leadership

Strengthen PASA’s influence and continue to build established role in policy and industry engagement.

Year 1	Years 2–3	Years 4–5
Formalise policy engagement approach and build on existing leadership	Increase early-stage policy involvement and consultation influence	Evidence impact on policy and regulatory outcomes

Pillar 3: Standards, Data, Technology and Resilience

Position PASA as a leading authority on pensions administration standards, data, resilience and emerging technologies, while maintaining oversight of key industry developments, including technology, market structure and member behaviour, to ensure PASA remains responsive and forward-looking.

Year 1	Years 2–3	Years 4–5
Define and evolve PASA’s position on AI, data standards, resilience and emerging technologies, including cyber, fraud and future market developments	Lead or support industry initiatives on standards and adoption	Recognised leadership in standards and innovation

Pillar 4: Engagement, Community and Growth

Build deeper and broader engagement across the PASA community, while supporting the development, recognition and professional standing of pensions administration.

Year 1	Years 2–3	Years 4–5
Introduce structured feedback and expand engagement within member organisations	Develop targeted engagement channels across roles and functions	Sustained, high-quality engagement across the industry

Pillar 5: Content, Communication and Digital Experience

Modernise PASA's content and delivery approach.

Year 1	Years 2–3	Years 4–5
Define and specify future content and digital strategy	Deliver transformation and expand formats and channels	Recognised for high-quality, accessible and impactful content

Pillar 6: Effective and Focused Delivery

Ensure clear governance, accountability and efficient delivery.

Year 1	Years 2–3	Years 4–5
Establish Board and Executive Agreement and align Working Groups	Strengthen coordination and delivery processes	Consistently high-impact and efficient delivery model

6. Measuring Success

PASA will assess success based on outcomes rather than activity. Success will be measured through a combination of outcome indicators and leading indicators demonstrating engagement, adoption and industry influence.

Key indicators include:

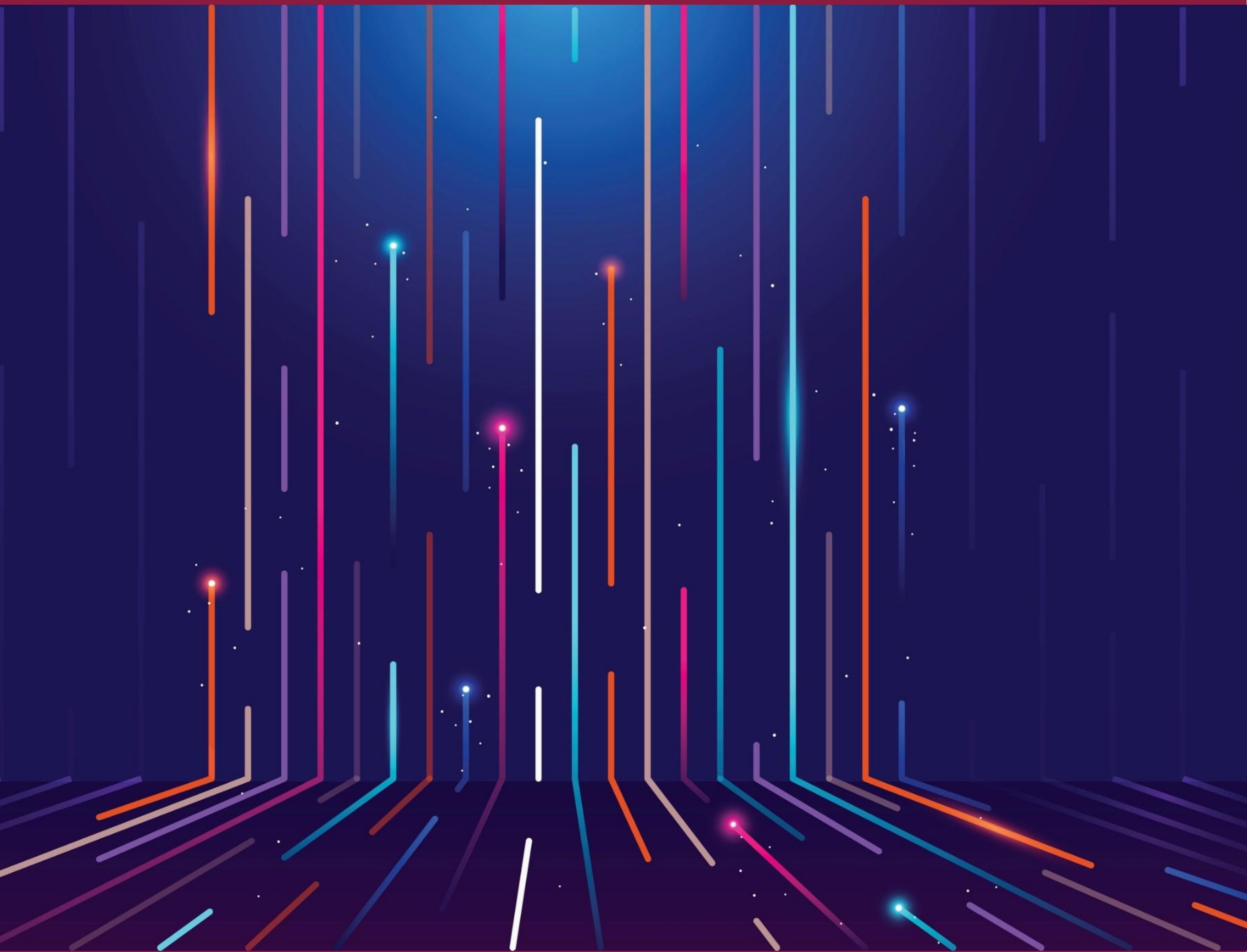
- Evidence of PASA's influence in policy and regulatory development, including engagement, consultation participation and references to PASA outputs
- Growth in membership and depth of engagement across member organisations
- Adoption and recognition of PASA Guidance, Standards and Accreditation across the industry
- Growth in reach, engagement and usage across PASA's content, platforms and digital channels
- Evidence of improved member outcomes
- Number of members covered by PASA Accreditation and year-on-year change

Detailed KPIs and annual targets will be developed alongside annual business planning and reviewed by the Board.

7. Governance and Oversight

- Clear roles and responsibilities defined through the Board and Executive Agreement
- Delivery ownership will be supported through defined Board, Executive, Committee and Working Group responsibilities
- Progress reviewed at each quarterly Board meeting, focusing on delivery, impact and prioritisation
- Annual review to ensure the strategy remains responsive and relevant

Through this strategy, PASA will build on its established foundations to strengthen influence, support innovation and promote higher standards across pensions administration in support of better member outcomes.



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PASA is a Community Interest Company and our full name is Pensions Administration Standards Association CIC. Company number: 6597097