

Strengthening administration oversight through a complex TPA transition

Client Context

A defined benefit pension scheme with more than 4,000 members was administered in-house using third-party software.. IGG is the sole Trustee of the Scheme, having previously acted as co-trustee.

Following the departure of the in-house Pensions Manager, the Scheme sponsor decided not to replace the role. Instead, the existing administration team would be reallocated into the sponsor's wider Payroll & Reward team, while the Scheme's administration services would ultimately move to a third-party administrator (TPA).

This created a period of significant operational change, requiring an interim model that could support the Scheme until the new administration arrangements were in place.

Challenge

With the Pensions Manager leaving, the immediate priority was to ensure continuity of service, with no gap in the day-to-day management and oversight of the Scheme's administration.

The Scheme needed to put the right support in place quickly and efficiently, with the relevant pensions management skills and expertise to take on the role. This included oversight of pensioner payroll, regulatory and administration requirements, and maintaining service levels for more than 4,000 members.

Alongside maintaining business-as-usual activity, the role also needed to support the Scheme as it prepared for the transition of its administration services to a new TPA.

At a glance



Scheme size

£390m



Membership

4,000+
members



Challenge

**Maintaining
continuity**



Outcome

**12 months of
continuity and
successful TPA
transition**



Solution

IGG provided experienced interim Pensions Manager support, working closely with the outgoing Pensions Manager and in-house administration team to quickly capture the knowledge, responsibilities and processes needed to maintain continuity of service.

With the interim resource in place, IGG managed the Scheme's day-to-day administration and pensioner payroll while overseeing the move to a new TPA. This ensured the Scheme continued to meet its administration and compliance requirements and maintain member service levels throughout the 12-month selection process.

IGG also used the transition as an opportunity to review the Scheme's existing administration arrangements and identify areas requiring improvement. This included strengthening oversight across payroll and Trustee reporting, identifying data gaps and addressing areas where historic Scheme practice differed from the provisions of the Rules.

The transition process was also designed to work efficiently alongside other Scheme priorities. The take-on data cleanse was combined with an essential GMP equalisation check, saving time and costs in preparing for GMP equalisation, with action plans agreed to address identified data gaps.



Result

Day-to-day administration and pensioner payroll were successfully maintained throughout the 12-month selection process, with member service levels preserved and a smooth transition to the selected TPA.

The new TPA's administration documents are more member-friendly, while members now have greater web access to their records and benefits as automated calculations are rolled out. This moves the Scheme away from elements of the previous system that required manual intervention and data input into Excel spreadsheets, which created a potential risk of error.

Overall, IGG maintained critical Scheme operations throughout the change in administration model while using the transition to strengthen oversight across payroll, reporting, data, Scheme practices and member services.

IGG Delivered



Interim Pensions
Manager support



Successful transition
to a new TPA



12 months of
administration and
payroll continuity



Identification and
resolution of
administration and data
issues

Why This Matters for Pension Schemes

Pension schemes are operating in an increasingly complex environment. Growing regulatory expectations, evolving governance requirements and significant strategic projects all place greater demands on Trustee Boards and in-house pensions teams.

Periods of organisational change, recruitment activity or resource constraints can add further pressure, making it challenging to maintain effective governance while continuing to deliver day-to-day operations.

An experienced Pensions Manager provides continuity, stability and specialist expertise, helping Trustees maintain strong governance, coordinate advisers and ensure schemes continue to operate efficiently during both business-as-usual activity and periods of change.



IGG's role

IGG provides experienced pensions professionals who work as an extension of your existing team, providing the right individual – backed by the right team – for your organisation.

Available on an interim, co-sourced or fully outsourced basis, our support provides pensions management expertise whenever it's needed.

- ✓ Experienced Scheme Secretarial and governance support
- ✓ Trustee meeting and governance management
- ✓ Effective adviser and stakeholder coordination
- ✓ Governance planning, records and action tracking
- ✓ Support through regulatory change and strategic projects

The result is a resilient pensions management function with the expertise and capacity to manage both day-to-day requirements and longer-term priorities effectively.



The value

Outsourcing provides immediate access to experienced pensions professionals without the time and cost associated with permanent recruitment, while IGG's wider team provides additional resilience and specialist expertise.

With IGG's Outsourced Pensions Management, organisations can benefit from:

- Immediate access to experienced pensions professionals
- Reduced reliance on a single individual
- Greater continuity and resilience
- Flexible and scalable support
- Wider specialist expertise when required
- Capacity to progress strategic priorities alongside business-as-usual activity

Whether you need interim cover following an unexpected departure, additional capacity for a strategic or risk transfer project, or a fully outsourced Pensions Manager, IGG provides practical, independent support tailored to your organisation.



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