



Department
for Work &
Pensions

25 February 2025

To: Iain Patterson, Senior Responsible Owner for the Pensions Dashboard Programme

From: Oliver Morley, Chief Executive and Accounting Officer, Money and Pensions Service

Peter Schofield, Permanent Secretary, Department for Work and Pensions

Nick Smallwood, Chief Executive Officer, Infrastructure and Projects Authority

Dear Iain,

APPOINTMENT AS SENIOR RESPONSIBLE OWNER FOR THE PENSIONS DASHBOARD PROGRAMME

We are writing to confirm your appointment as the Senior Responsible Owner (SRO) of the Pensions Dashboards Programme (the Programme), effective from 30 April 2024. This letter sets out your responsibilities and the support you can expect to receive from the Money and Pensions Service (MaPS), the Department for Work and Pensions (DWP) and the Infrastructure and Projects Authority (IPA).

As SRO you are directly accountable to Oliver Morley the MaPS Chief Executive, as the MaPS Accounting Officer, under the oversight of Peter Schofield the Permanent Secretary as Principal Accounting Officer for DWP, and the Minister for Pensions.

Your Programme forms part of the MaPS Change Portfolio, the wider DWP portfolio, and is included in the Government Major Projects Portfolio (GMPP).

You have personal responsibility for the delivery of the Pensions Dashboards Programme with our support and will be held accountable for delivery of its objectives, with the policy intent and outcomes expected. This encompasses securing and protecting its vision, for ensuring that it is governed responsibly, reported on honestly, with issues escalated appropriately and for influencing constructively the context, culture and operating environment of the Programme. You are also responsible for ensuring the ongoing viability of the Programme and recommending its pause or termination if appropriate. Where issues arise which you are unable to resolve, you are responsible for escalating these to the MaPS Board, and, when necessary, DWP

Change Portfolio Board and/or Investment Committee which are both committees of DWP Executive Team and support the DWP Accounting Officer.

You remain accountable to Ministers, as set out in the Civil Service Code, and should deliver the project in accordance with the objectives and policy intent as set by Ministers.

In addition to your internal accountabilities, SROs of GMPP programmes and projects are personally accountable to Parliamentary Select Committees. This means that, from the date of this letter, you will be held personally accountable to and could be called by Select Committees to account for and explain the decisions and actions you have taken to deliver the Programme.

It is important to be clear that your accountability to Parliament relates only to implementation, within the terms agreed in this letter. It will remain for the Minister to account for the relevant policy decisions and development.

More information on this is set out in [Giving Evidence to Select Committees – Guidance for Civil Servants](#), sometimes known as the Osmotherly Rules. Information on the roles and responsibilities of the SRO are detailed in the Infrastructure and Project Authority's guidance on [the role of the Senior Responsible Owner](#). You should also make yourself familiar with the [Government Functional Standard for Project Delivery](#), the requirements of the Government Project Delivery Framework, and the guidance and requirements for project delivery as set by MaPS and DWP.

Time Commitment and tenure

This will be a full-time role to enable effective delivery and to execute your responsibilities in full.

You will be expected to remain in this role until the end of your contract with MaPS, 29th April 2026. Progress towards this will be reflected in your personal objectives. Any changes to the agreed time commitment or tenure of the role, as set out above, will require both departmental and Infrastructure and Projects Authority consent.

Objectives and Performance Criteria

The Programme has been established to work with the pensions industry to deliver a dashboards service in the UK. The policy intent supported by this programme is to enable individuals to access their pensions information online, securely and all in one place. Dashboards will provide clear and simple information about an individual's multiple pension savings, including their State Pension.

The Programme's vision is: "To enable individuals to access their pensions information online, securely and all in one place, thereby supporting better planning for retirement and growing financial wellbeing."

Any proposed changes to scope which impact on this intent or the realisation of benefits must be authorised by the DWP's Accounting Officer (Principal Accounting Officer), who may delegate his decision-making authority to the MaPS Board and may be subject to further levels of approval from DWP Investment Committee and/or Change Portfolio Board.

The Programme will deliver the following objectives:

- Design, build, test, run, and continuously improve the central digital architecture which will connect dashboards to pension providers and schemes and to the State Pension designing and delivering the central pension finding, identity verification, and consent and authorisation services;
- Design, deliver, maintain, and continually improve effective governance arrangements for the dashboards ecosystem including setting standards with which all parties will comply, and a service design and operating model;
- Design and implement the steady state operating model for the dashboards service and provide advice to government to assist their decision making on long term ownership and funding model.

Your personal objectives and performance criteria which relate to the programme are:

- To visibly and actively lead the Pensions Dashboards Programme through to a structured closure, ensuring that all appropriate steps are taken to ensure that the benefits forecast by the programme are realised. In particular:
 - monitoring and controlling the progress of the programme at a strategic level, being honest and frank about its progress, risks and issues;
 - communicating effectively with senior stakeholders regarding programme progress and providing clear, appropriate and delivery-focused decisions and advice to the Programme Director;
 - escalating serious issues quickly and with confidence to senior management; and
 - ensuring a plan for both long term benefits realisation and on-going sustainability is agreed with key stakeholders as part of the process of transitioning the programme to “business as usual”.

You are expected to run your project in accordance with the [Government Functional Standard for Project Delivery](#), the other [Functional Standards](#) as applicable to the Programme, and the requirements of the Government Project Delivery Framework.

Extent and Limit of Accountability

(1) Finance and Controls

HM Treasury spending controls will apply on the basis set out within the Department's and MaPS' delegated authority letters. Where the Programme exceeds the delegated authority set by HM Treasury, the Treasury Approval Point process will apply, and the details of each approval process must be agreed with DWP's Planning, Fiscal Events and Reporting (PFER) team via the ALB team. You should consult DWP's ALB Partnership and Finance colleagues on how to go about this.

You should note that where expenditure is considered novel, contentious, repercussive, or likely to result in costs to other parts of the public sector, HM Treasury approval will be required, regardless of whether the programme expenditure exceeds the delegated authority set by HM Treasury. If in doubt about whether approval is required you should, in the first instance, consult DWP's ALB Partnership and Finance colleagues before raising with the relevant HM Treasury spending team.

The overall estimated budget, resourcing requirements and tolerances for your project/programme will be agreed as part of the approval process. You will be expected to deliver within these tolerances and report quarterly on these as part of GMPP reporting.

You should operate at all times within the rules set out in [Managing Public Money](#). In addition, you must be mindful of, and act in accordance with, the specific HM Treasury delegated limits and Cabinet Office controls relevant to the Pensions Dashboards Programme. Information on these controls can be found here: [Cabinet Office controls](#).

(2) Delegated authority

You are authorised to:

- approve expenditure up to the limits included in the Delegated Authority Letter to you from Oliver Morley in his role as Accounting Officer for MaPS;
- agree Programme rescheduling of baselined milestones where slippage does not impact on subsequent key milestones and deliverables. Any rescheduling that results in a material change and that would breach agreed tolerance levels must be taken to the MaPS Board for approval, and then, if necessary, DWP Change Portfolio Board or Investment Committee as appropriate; and
- recommend to the MaPS CEO and the MaPS Board the need to either pause or terminate the programme in a timely manner and then, if necessary, DWP Change Portfolio Board or Investment Committee as appropriate.

These authority limits are subject to change and other conditions or tolerances may be set as part of the business case approval and ongoing monitoring processes which you should then operate within.

Where issues arise which take you outside of these authority limits which you are unable to resolve, you are responsible for escalating these issues to the MaPS CEO and the MaPS Board.

Appointments

You should appoint a full time Programme Director to support you in the management of the Programme and make other appointments as required for the control and delivery of your programme within your delegated authority.

Governance and assurance

You should pay attention to ensuring effective governance for the Programme including the establishment of a Programme Board with appropriate membership and clear terms of reference.

As SRO (primary owner), you must ensure that the Programme secures business case approval from the Programme Board, MaPS Board, DWP Investment Committee, DWP Ministers (as necessary) Cabinet Office and HM Treasury. You should also ensure that the Programme remains aligned to the strategic outcomes, costs, timescales, and benefits in line with the approved business case as well as monitoring the context within which the Programme is being delivered to ensure it remains valid.

Where a change impacts the scope, costs, benefits, or planned delivery milestones agreed as part of an agreed business case, you are responsible for following the agreed change request approval process and setting a new, approved, business case baseline.

You should ensure that an accounting officer assessment is completed alongside the approval of the Outline Business Case and that this is published on GOV.UK as part of the government's transparency requirements on major projects. You are responsible for bringing to the attention of the MaPS Accounting Officer any material changes in the Programme which could require a new accounting officer assessment to be completed and published. [Guidance on completing accounting officer assessments](#) for major projects is available from HM Treasury.

Although you are directly accountable for this Programme, you are also expected to support delivery of DWP' overall strategic objectives. This means that you are expected to work collaboratively with other SROs and project directors in adjacent projects and programmes in both MaPS and DWP, and with their portfolio management offices to manage dependencies, resources, schedules, and funding to support delivery of the overall change both organisations need to achieve their strategic objectives.

You should ensure that appropriate and proportionate assurance is in place and agree on the level and frequency of assurance reviews through the maintenance of an integrated assurance and approvals plan. You should develop this plan and its maintenance in collaboration with the DWP Departmental Assurance Coordinator and the Infrastructure and Projects Authority.

Programme Status, reporting and transparency arrangements

The Programme status at the date of your appointment is reflected in the latest quarterly return to the IPA, where the most recent assessment of deliverability was Amber. This is the agreed position as you assume formal ownership of the Programme.

You are responsible for ensuring the honest and timely reporting on the position of the Programme to the Infrastructure and Projects Authority while it remains on the GMPP

and for providing reports and information to the DWP portfolio management office as required given the DWP Permanent Secretary is the Principal Accounting Officer. Reporting should include carbon measurement, and other sustainable development goals demonstrating evidence that the project contributes to an overarching environmental strategy and is aligned with defined Net Zero pathways. Information on the Programme will be published annually by the Infrastructure and Projects Authority.

As part of the government's commitment to transparency on major infrastructure projects, you are responsible for publishing on GOV.UK:

- A summary of the accounting officer assessment completed in line with the approval of the Outline Business Case and summaries of any subsequent assessments should they be required; and
- A close out report after the programme has completed.

The Portfolio Manager in DWP will assist you through any publishing requirements.

Development and support

As SRO of a GMPP programme, you are required to complete the Major Projects Leadership Academy, and you have applied to commence the MPLA as part of cohort 43 starting in January 2025.

To widen experience and understanding of the role, SROs are also expected to become accredited assurance reviewers and to lead or participate in such reviews for other government departments, the wider public sector, and other areas of MaPS as appropriate. Becoming an assurance reviewer and completing a review will form part of your time at the Major Projects Leadership Academy. To maintain your accreditation, you will be required to participate in a review at least once every 12 months.

The department will assist you in securing the necessary resources to support the Programme and will set clear guidance, requirements and standards, which align to the [Government Functional Standard on Project Delivery](#), to enable good governance and effective delivery.

You will be part of DWP's cohort of major project leaders who will be expected to support each other, share good practice and lessons learned and to collectively develop solutions. You should liaise with the department's Head of Profession for project delivery to discuss the maintenance and development of your delivery and leadership skills.

The Infrastructure and Projects Authority will be available to you for support, advice, and assurance throughout the Programme's time on the GMPP.

Following approval of the Programme Business Case and entry onto the DWP Portfolio, DWP Change Portfolio Office will provide ongoing oversight and support and will take steps to help resolve and escalate risks, issues or constraints that are acting as a blocker to successful delivery.

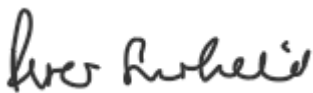
We would like to take this opportunity to wish you every success in your role as SRO.

Yours sincerely,



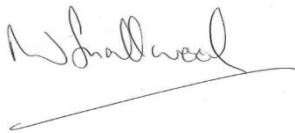
Oliver Morley

Chief Executive, MaPS



Peter Schofield

Permanent Secretary, DWP



Nick Smallwood

Chief Executive, IPA

I confirm that I accept the appointment including my personal accountability for implementation of the programme detailed in the letter above.

Name of SRO: Iain Patterson

Signature of SRO:



Date: 11/02/2025