

PENSION FUND SERVICE PLAN 2014-15:
EXTRACT OF PROJECTS AND IMPROVEMENT ADMINISTRATION TASKS

Key:

** - Project based action

* - Regular ongoing action

Bold indicates a change from the original plan

Progress (in relation to planned period):



Complete



On track or ahead of schedule



Commenced but behind schedule



Not commenced

Note	Key Action -Task	Frequency	New Actions required (start/end)	Progress			
				Q1	Q2	Q3	Q4
	GOVERNANCE						
3	Update Statutory Documents – Pensions Administration Strategy	Yearly	Defer to Q 1 2015/16				
	Staffing – Pensions Administration	Project	Transfer temporary contracts to full time (Q1/2)	*	*		
	CIPFA Benchmarking – Pensions Admin.	Annual		*	*		
	PENSIONS ADMINISTRATION						
	Develop Performance measurement and reports	Project	Processes have been reviewed and the system is being updated (Q3). Monitoring and reporting of performance to be in Q1 2015/16	*	*	**	
	<u>Operational</u>						
1	New CARE scheme Implementation	Project	Adapt procedures for new scheme (Q1/2) Continue to train staff on new scheme (Q1/2)	**	**		

Note	Key Action -Task	Frequency	New Actions required (start/end)	Progress			
				Q1	Q2	Q3	Q4
2	Reduce Backlog of tasks	Project	Backlog of tasks being actioned (Q1/Q4+) Monitoring and reporting on backlog (Q1/Q4+)	*	*	*	*
	Rechargeable employer work (EVR)	Project	FCC (Q1)	*			
	<u>Technical</u>						
	Benefit Statements (Active)	Annual			*		
	Benefit Statements (Deferred,)	Annual		*			
	Benefit Statements (Cllr)	Annual	Completed by 31 October 2014		*	*	
	AVC (Equitable Life) Statements	Annual		*			
	Life Time Allowance Letters (LTA)	Annual		*			
5	Managing employer data	Project	Data Cleansing Denbighshire CC(Q1) Commence iConnect project (Q4) Data Cleansing Flintshire CC (Q3 – Q1 2015) Discuss Data Cleansing with Wrexham CBC (Q3)	**	**	**	**
	Employer Contribution Return Reconciliation	Annual		*	*		
	Altair Updates / Management Tool Kit	As required					
4	Disaster Recovery	Annual	Test Recovery Plan (Q1) Meeting with ICT and Heywoods (Q3)	*	*	*	

Note	Key Action -Task	Frequency	New Actions required (start/end)	Progress			
				Q1	Q2	Q3	Q4
	<u>Payroll</u>						
6	Pensions Increase	Annual		*			*
6	P60s	Annual		*			
1	<u>Communication</u>						
	Web-site and infonet maintenance	Daily	Update for New Care Scheme (Q4)	**	**	**	**
	Update, document and distribute Pension literature	Various	Update for new CARE Scheme (Q1)	**	**		
	Road Shows , Training, Pre-retirement seminars for the membership	Daily	New Scheme Roadshows (Q1)	**			
	Training for the employers	Daily	New Scheme Training (Q1)	**			
	Arrange Annual Employer Meetings	Annual			*	*	
	Arrange Annual Report Production	Annual			*	*	
	Document SLAs with employers	Annual	Update Discretions re CARE Scheme (Q3)	**	**	**	*