
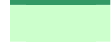

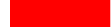


**PENSION FUND SERVICE PLAN 2014-15:**  
**EXTRACT OF PROJECTS AND IMPROVEMENT ADMINISTRATION TASKS**

**Key:**

- \*\* - Project based action
- \* - Regular ongoing action

**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
	<b>GOVERNANCE</b>						
3	Update Statutory Documents	Yearly	Document Administration Strategy (Q3/4)			**	**
	Staffing – Pensions Administration	Project	Transfer temporary contracts to full time (Q1/2)	*	*		
	CIPFA Benchmarking – Pensions Admin.	Annual		*	*		
	<b>PENSIONS ADMINISTRATION</b>						
	Develop Performance measurement and reports	Project	Work on-going in Wales (Q1/2)	*	*		
	<b><u>Operational</u></b>						
1	New CARE scheme Implementation	Project	Adapt procedures for new scheme (Q1/2)	**	**		

Note	Key Action -Task	Frequency	New Actions required (start/end)	Progress			
				Q1	Q2	Q3	Q4
			Continue to train staff on new scheme (Q1/2)				
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)	*			
	<b><u>Technical</u></b>						
	Benefit Statements (Active)	Annual			*		
	Benefit Statements (Deferred,)	Annual		*			
	Benefit Statements (Cllr)	Annual			*		
	AVC (Equitable Life) Statements	Annual		*			
	Life Time Allowance Letters (LTA)	Annual		*			
5	Managing employer data	Project	Appoint to Temporary Position (Q1) Implement I connect with DCC(Q1) Data Cleansing with FCC (Q1/3) Gathering information from Itrent (Q1/4) I connect sign up WCBC (Q1)	**	**	**	**

Note	Key Action -Task	Frequency	New Actions required (start/end)	Progress			
				Q1	Q2	Q3	Q4
	Employer Contribution Return Reconciliation	Annual		*	*		
	Altair Updates / Management Tool Kit	As required					
4	Disaster Recovery	Annual	Test Recovery Plan (Q1)	*	*		
	<b><u>Payroll</u></b>						
6	Pensions Increase	Annual		*			*
6	P60s	Annual		*			
	<b><u>Communication</u></b>						
	Web-site and infonet maintenance	Daily	Update for New Care Scheme (Q1)	**	**		
	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			*	*	

Note	Key Action -Task	Frequency	New Actions required (start/end)	Progress			
				Q1	Q2	Q3	Q4
	Arrange Annual Report Production	Annual			*	*	
	Document SLAs with employers	Annual	Update Discretions re CARE Scheme (Q1)	**	**		*