

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) | ** | ** | ** | * |