

WORK PLANS - APPENDIX 2

WORKPLAN - PENSION ADMINISTRATION TO 31 MARCH 2011

Project	Proposed Action	Report ?
<p>“Altair”– Upgraded AXIS administration software (Heywood)</p>	<p>Migration to <i>Altair</i> (updated pension administration and payment software). Deferred from January 2010 until after data extract for the triennial actuarial valuation due to Heywood experiencing technical problems. Will now go live following in-depth testing on 21st September 2010 .</p>	<p>N/A</p>
<p>Member & Employer Access – a change of provider</p>	<p>Following a visit to see the alternative Heywood products, it was decided not to renew the contract with Gandlake in October 2010 and instead to move to the Heywood facility for member and employer access which has additional facilities such as a pensions calculator and two-way portal which had not been developed by Gandlake. This will run on new <i>Altair</i> and member access will switch from Gandlake in October 2010 and employer access will begin in early in 2011.</p>	<p>N/A</p>
<p>Employer two-way portal (“Globalscape”)</p>	<p>B&NES have purchased a two way portal which will allow employers and the Fund to send information electronically to each other. Pensions will be one of the departments that will share use of this facility at a very reasonable cost. Expected to go live in late September.</p>	<p>N/A</p>
<p>Administration Strategy/ Partnership (SLA) Agreements</p>	<p>Consultation with employers on the Administration Strategy Policy document will take place in autumn 2010. Individual partnership (SLA) agreements with employers will provide efficient delivery of key information to improve the service that Pensions can provide to Fund members. The strategy will incorporate communication, employer staff training and technological enhancement /development (e.g. Electronic Data Interface (“EDI”) Monitoring) Regular review meetings will be integral to a successful process.</p> <p>Will also allow the Fund to pass on to a poor-performing employer extra costs where failure to supply information causes a disproportionate amount of work by Pensions or where “monetary fines” are incurred as a result of that employer’s poor performance. The document is seen as a positive way forward to improve ongoing working between the Fund and its 108 diverse employers. Additional costs will be only passed on as a “last resort.”</p>	<p>Poss. Dec 2010</p>
<p>EDI - auto designer interface</p>	<p>Work continuing on setting up major employers to enable automatic electronic update of member data changes including starters. Focus groups originally set up with employers for the New Look Scheme will be continued to keep momentum going. Specific focus of the newly created Employer Relationship team for 2010 onwards. EDI will be included in the Administration Strategy to work more closely with Fund employers with an expected date of April 2012 for all employers to provide data electronically.</p>	<p>N/A</p>
<p>Actuarial Valuation/Data cleanse</p>	<p>All data sent to Mercer on 15th July 2010 (on schedule).and sent to Govt. Actuary end of August for the National Fund evaluation in connection with <i>Cost Sharing</i> coming in 2013. Results of the Valuation are due in October and will be reported to Committee in December 2010</p>	<p>Dec 2010</p>