

WORKPLAN - PENSION ADMINISTRATION TO 31 MARCH 2013

Project	Proposed Action	Report
Employer Self Service	<i>Employer Self Service</i> (a heywood software application). Latest release allows employers to go on-line and input starters, changes and leavers electronically. The leavers form is currently being tested by APF and the Expected roll out to employers in late summer 2012.	N/A
Administration Strategy & (SLA) Agreements-rollout work	The Pensions Administration Strategy effective from April 2011. Important areas to be progressed: 1. Employer staff training - plan being drawn up to give training during 2012 2. Electronic reporting of member data changes either by bulk Electronic Data Interface or via Employer Self Service (see above) in 2012	N/A
Electronic Delivery of information to members	Implement the 3 year Strategy to move to electronic delivery to all members (other than those who choose to remain with paper) Provide members with the 2 further notices of the Fund's intention to cease to send them paper copy communication in favour of electronic delivery (unless they opt out from this).	N/A
Strategy to communicate proposed government changes to LGPS benefits	To put in place a workable strategy/project plan to effectively communicate the proposed changes to LGPS and what it will mean for members/employers utilising electronic (website) paper and face to face meetings with employers' and their staff.	N/A
Member opt out rates	Monitor and report on these to Committee at each meeting	N/A
AVC Strategy	Finalise new AVC Investment Strategy for approval by Committee	TBA
Auto-enrolment	Devise and agree a strategy with employers to cope with the government initiative being introduced from October 2012 for auto-enrolment of opted out members every 3 years. First employers "staging dates" will be the four unitaries in March-May 2013.	