WORKPLAN - PENSION <u>ADMINISTRATION</u> TO 31 MARCH 2013

Project	Proposed Action	Report
Employer Self Service	*Employer Self Service (*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 and the expected roll out to employers is early 2012 to use for submission of all information* by 31 March 2013. * *except for those using i-Connect (see below)*	N/A
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. Purchase of *i-Connect* middleware to provide monthly update to APF pension database of the main four unitaries approved by Committee at last meeting. Contract terms agreed and contract to be signed in November. Start testing in December and go live for updates in early 2012 prior to unitaries staging dates..	
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	2013