

**WORKPLAN - PENSION ADMINISTRATION TO 31 MARCH 2014**

| Project   | Proposed Action  | Report |
|---|--|--------|
| Employer Self Service rollout   | Employer Self Service rolling out of top ten employers (size) and then to others so full electronic delivery is achieved by the end of Q3 2012/3 including employer training   | N/A    |
| i-Connect software – to update member data on ALTAIR pension database automatically monthly | <p><i>i-Connect</i> middleware to provide monthly update to APF pension database purchased by the Fund and four unitaries whose staging dates are imminent.</p> <p>All payroll extracts from unitaries received (except S Glos) and i-Connect in test – need to go live for these by April 2013</p> <p>Market to other employers during 2013/14 once testing complete and proved workable.</p>   |        |
| Move to Electronic Delivery of generic information to members                               | <p>Implement the 3 year Strategy to move to electronic delivery to all members (other than those who choose to remain with paper).</p> <p>Provide members with 1 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).</p> <p>From Q3 2013 Campaign to increase the sign up of members to Member Self Service (<i>My Pension on line</i>) to allow electronic access to documents</p> | N/A    |
| Successfully Communicate proposed government changes to LGPS benefits                       | To follow through the project plan to effectively communicate the proposed changes to LGPS in 2014 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   | Q313   |