

WORKPLAN - PENSION ADMINISTRATION TO 31 MARCH 2014

Project	Proposed Action	Report
<i>Pen Admin Strategy & SLAs</i> review	The <i>Pensions Administration Strategy</i> effective from April 2011 will be reviewed in autumn 2013 – two and a half years after its first issue . The generic Service Level Agreement (SLA) will also be reviewed.	N/A
<i>i-Connect</i> software – to update member data on ALTAIR pension database automatically monthly	<i>i-Connect</i> Bristol C C and B&NES have both gone live North Somerset and South Glos are working on their payroll extracts and should go live later this year. Employers need to go live for these by April 2014 Market to other employers during 2013/14 once testing complete.	N/A
Employer Self Service	Employer Self Service rolling out of top ten employers (size) and then to others so full electronic delivery is achieved by the end of 2013 including employer training	N/A
Move to Electronic Delivery of generic 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 1 further notice of the Fund's intention to cease to send them paper copy communication in favour of electronic delivery (unless they opt out from this). 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.	N/A
Strategy to communicate proposed govt 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.	Sep 2013
Member opt out rates	Monitor and report on these to Committee at each meeting	Every meeting
AVC Strategy	Finalise new AVC Investment Strategy and review the investment report currently being prepared by Mercers on funds investment performance	Dec 2013