

**WORK PLAN POSITION AS AT 31 MARCH 2014**

**APPENDIX 2**

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

<b>Project</b>	<b>Proposed Action</b>	<b>Report</b>
<i>Pen Admin Strategy &amp; SLAs</i> review	The <i>Pensions Administration Strategy</i> effective from April 2011 will be reviewed following implementation of the New LGPS 2014. 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	<p><i>i-Connect</i> middleware to provide monthly update to APF pension database purchased by the Fund and four unitary authorities.</p> <p>Bristol CC, B&amp;NES and North Somerset Council all now live. South Gloucestershire Council requested deferment until April 2014 to incorporate revised data specification.</p> <p>Market to other employers during 2014/15 following implementation to four unitary authorities.</p>	N/A
Employer Self Service	<p>Employer Self Service rolling out of top ten employers (size) and then to others so full electronic delivery is achieved by the end of Q4 2013/14 including employer training.</p> <p>As at November 2013 – 57 employers trained covering 71% of scheme membership.</p>	N/A
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 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).</p> <p>From Q4 2013/14 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
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.	Jan 2014
Member opt out rates	Monitor and report on these to Committee at each meeting	Every meeting
AVC Strategy	Finalise new AVC Investment Strategy pending an investment report from Mercers	Mar 2014