Project Work - Overview   Appendix 5

Following the restructure of the pensions administration team in January 2017 a number of strategic projects have been identified for completion across both Member Services and Employer Services to continue delivery of business service objectives and ensure the Fund is compliant with TPR Code of Practice. The key projects are listed below along with the anticipated additional resource required to support and achieve completion. The Fund will make use of existing staff resource and expertise in key areas. Three fixed-term temporary posts will be recruited to backfill where required and the Fund will seek to appoint four apprentices as incorporated in the original restructure plan.

Member Services

Key Projects

- To address the aggregation backlog of approximately 3,000 cases.
- To carry out a project to clear cases currently set at reply due status (pending third party response).
- To implement a new process to deal with an upcoming increase in workload in respect of the 2014 Scheme 5 Year Refunds – impacting from April 2019

Additional Resource Required

- 1 temporary FTC (PO Grade N)
- Temp transfer of existing 0.5 resource from Quality Assurance team (SPO Grade M)
- X 2 Apprentice roles

Projects will run in sequence

Employer Services

Key Projects

- Roll out of monthly IConnect returns across all employers (+ 350 employers)
- Member address tracing project to support bulk exercise (approx. 6,000 cases)

Additional Resource Required

(i)   for IConnect

- 1 temporary FTC (SPO Grade M – temp increase in hours for 2 existing post holders)
- X 2 Apprentice roles
- Temp transfer of existing 0.5 resource from Quality Assurance (approx. 3 – 6 months).
- Assistance from Communications & Marketing team

(ii)   for Address Tracing

- 1 temporary FTC (PO Grade N)

Detailed quarterly progress reports will be provided to Pensions Committee and Pensions Board for noting.