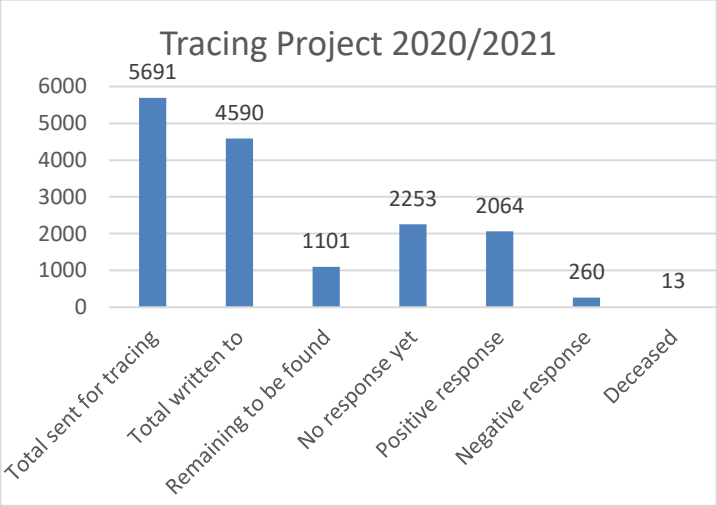
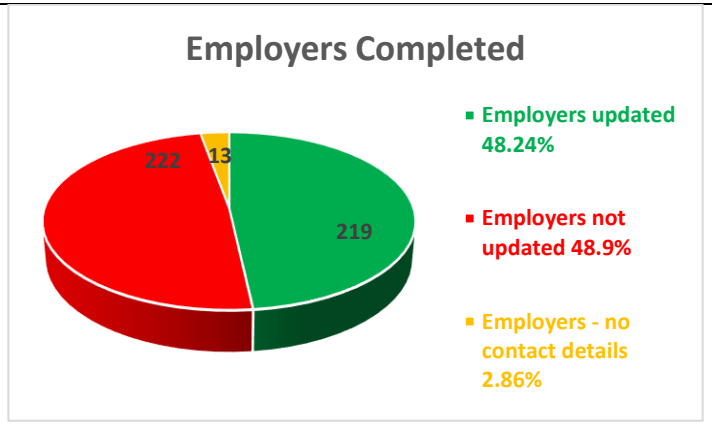
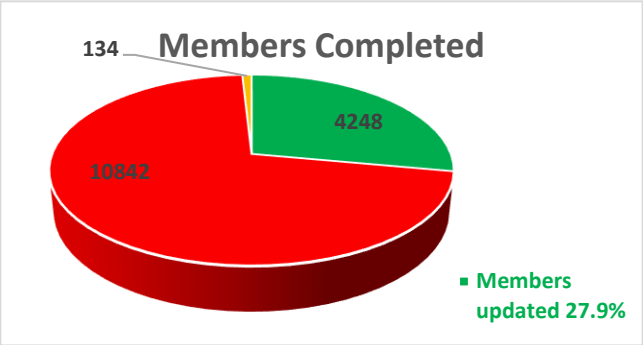
Item	Details	Action by Fund / Next Steps
Address Tracing	 Total tracing project costs from Mercer to date: £23,909.00	The members that have been written to but no response received have been sent a reminder letter in October 2021 and replies are starting to be received. The members that have not been found by the first 2 levels of tracing will shortly be sent to the tracing agency (via Mercer) for a third and final "premium batch" trace service. The fee for this higher level of search is £8 plus VAT on a no find no fee basis. This will be the last stage of the tracing project with Mercer. New "gone away" cases will be treated under a business-as-usual process, with the Fund carrying out the first stage of tracing followed by referral to the tracing agency for batch tracing. After this 3rd level of tracing a process will be agreed in place to deal with untraced members and to review cases again at Normal Pension Age. Tracing pension members and keeping member addresses up to date is a key requirement of the TPR and data cleansing must continue to form part of our BAU processes.
McCloud		The initial project started in December 2020 and to date we have completed data collection for just under 50% of our employers. The membership completed number is proportionately lower as we have seen returns in the main from smaller employers. The 2 largest employers that require data remedy are yet to make a data return which covers just over 7000 members. We are working with these UA's to ensure they make data returns by 31/12/2021. Regulation's timeline: • Regs are currently proceeding through Parliament and are expected in early 2022.

		• Consultation on draft guidance Summer 2022 • Final guidance to be issued Autumn 2022 • Remedy regulations due to come into force Spring 2023 Next steps: Chase employers not yet returned/include communication with FD's Complete all data collection by 31st December 2021 Upload data and deal with queries by 31st March 2022 Consider requirements and resource for remedy in preparation for regulations. Consider how to deal with exited or insolvent employers Consider how to deal with transfers
i-Connect – Monthly Data Returns	**Scheme Totals** Employers with active Members (including maintained schools who outsource payroll) – 465 Active members as of October 2021 - 42249 **Current IC Totals** Employers on IC – 273 (58% of Employers) Employers targeted for IC – 192 (42% of Employers) Active Members covered by IC – 33816 80% of active membership covered by IC (figures as at 7/10/2021)	Since Year End progress has been made to push all small employers to use Online Returns within IC. We now have 100 employers using online returns. The i-Connect team leader has begun spending 2 focused days per week on the project with the following 4 aims: • All employers to by using i-Connect • Hand back loading of data via the portal via IC to employers • Fully utilise all IC tools including dashboard • Roll out the IC document portal to all IC users

		Employer engagement has been low with the project therefore a more focused approach is being taken with the project however BAU must also be a main priority for the IC team. We identified 19 groups of employers including payroll providers to onboard, 4 of which would cover the majority of our active membership. These 4 groups (payroll providers) are now the focus of the project for extract development and onboarding.