

WORKPLAN - PENSION ADMINISTRATION TO 31 MARCH 2012

Project	Proposed Action	Report
Employer Self Service	<i>Employer Self Service</i> a heywood software application) allowing Employers to do their own member estimates and associated cost calculations for redundancies. Introduce the facility for employers to advise the Fund on member data changes from October 2011, (Data Protection issues currently need clarification).	N/A
Administration Strategy(SLA) Agreements	<p>The Pensions Administration Strategy effective from April 2011. important areas to be progressed:</p> <ul style="list-style-type: none"> - Employer staff training - Electronic reporting of member data changes either by bulk Electronic Data Interface <i>or</i> via Employer Self Service (<i>see above</i>) by April or October 2012, depending on employer's size - Performance Reporting and review meetings with employers <p><i>See Report on Pensions Administration Strategy Report submitted to this meeting.</i></p>	N/A
Electronic Delivery of information to members	<p>Devise a Strategy to move to electronic delivery to all members (other than those who choose to remain with paper)</p> <p>Provide members with the 3 appropriate 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><i>See item within Budget Monitoring and Performance Indicators Report submitted to this meeting.</i></p>	N/A
Strategy to communicate proposed government changes to LGPS benefits (Post Hutton and H M Treasury proposed increase in members' contributions)	To put in place a workable Strategy/Timetable to effectively communicate the proposed changes (Post Hutton and H M Treasury proposed increase in members' contributions) to the Scheme and what it will mean for members/employers utilising electronic (website) paper and face to face meetings with employers' and their staff	N/A
Monitor Opt out rates	Change processes to mark opt out on members records as reason for leaving and be able to monitor and report on these to Committee)	N/A
AVC Strategy	Finalise new AVC Investment Strategy for approval by Committee	Dec 2011