

### Benefit Administration Team

| Target                                            | Owner                                                | Due Date                          |
|---------------------------------------------------|------------------------------------------------------|-----------------------------------|
| Initiate Mentor/Buddy System                      | Benefit Administration Team                          | ASAP                              |
| Continue Bite Size Training Sessions              | Benefit Administration Team                          | As required                       |
| Complete Record Splitting Project                 | Benefit Administration Team                          | 31st March '10                    |
| Complete Guaranteed Minimum Pension (GMP) Project | Benefit Administration Team with Kat Woodard leading | 31st March '10                    |
| Integrated Training                               | All (Section wide; buddies & mentors training)       | ASAP workloads permitting         |
| Complete Pensions Increase Project                | Sam Howe                                             | 31st March '10                    |
| Word integration & document generation project    | Benefit Administration Team (feedback improvements)  | 31st March '10                    |
| Payroll Interface preparation                     | Benefit Administration Team/Systems Team - workload  | 31st March '10                    |
| Investigate Teachers' Pensions Agency links       | Benefit Administration Team/Teachers Team            | Begin investigation 1st April '09 |

### Client Liaison

| Target                                         | Owner                                                               | Due Date                          |
|------------------------------------------------|---------------------------------------------------------------------|-----------------------------------|
| Record Splitting                               | Client Liaison Team                                                 | As identified through Year End    |
| Resources action plan                          | Client Liaison Team/Benefit Administration Team                     | ASAP                              |
| Employer visits & fees consideration           | Client Liaison Team/Benefits Administration Team with CP/KH leading | ASAP                              |
| Year End & preparation                         | Client Liaison Team                                                 | Work on biggest employers first   |
| Knowledge share with Teachers' Pensions Agency | Client Liaison/Teachers Team                                        | Begin investigation 1st April '09 |

### Systems

| Target                                                     | Owner                                                                           | Due Date                               |
|------------------------------------------------------------|---------------------------------------------------------------------------------|----------------------------------------|
| System support for Teachers with Axis                      | Systems with Mike Dean leading. Investigate: scanning, doc gen, task management | Begin investigation 1st April '09      |
| Interfacing Starters, Changes Leavers                      | Systems with Mike Dean leading. Investigate: scanning, doc gen, task management | Once record splitting project complete |
| Electronic Contributions Agency forms                      | All & Mike Dean leading                                                         | 31st March '10                         |
| Axis Payroll – printer & sealing                           | Systems Team                                                                    | Begin researching 1st April '09        |
| Hosted System costing & renewal                            | Mike Dean                                                                       | Dec '09 for new contract Feb '10       |
| Year End – anything to improve? Preparation for Valuation. | Systems Team                                                                    | Begin investigation 1st April '09      |
| Electronic update of Guaranteed Minimum Pensions           | Systems Team with Mike Dean leading                                             | 31st March '10                         |
| Annual Benefit Statements feedback forms & inbox           | Systems                                                                         | Begin researching 1st April '09        |

### Teachers Pay and Pensions

| Target                                                | Owner                                                  | Due Date                                     |
|-------------------------------------------------------|--------------------------------------------------------|----------------------------------------------|
| Annual Service Review                                 | Teacher's Team                                         | 28th August 2009                             |
| Payment of Contributions to Teachers' Pensions Agency | 2 rotational staff from Teachers Team & Chris Thompson | Monthly on 7th Month by 9:30am               |
| TR17 Audit (Teachers & Authority contributions)       | Chris Thompson                                         | Annual                                       |
| Balance Pension Contributions                         | Teacher's Team/Chris Thompson                          | November 2009 ready for Audit                |
| Salary Review                                         | Teacher's Team/Chris Thompson                          | Aug-09                                       |
| Teachers Records on Axis Investigation                | Teacher's Team/Systems Team                            | Initial investigation to begin 1st April '09 |
| Set up Task Management System                         | Teacher's Team/Systems Team                            | Initial investigation to begin 1st April '09 |
| Preparation for high level Queries after ABS's sent   | Teacher's Team                                         | 31st March '09                               |
| Investigate "Golden" rewards                          | Teacher's Team                                         | As information is available '09              |

**Treasury**

| <b>Target</b>                                           | <b>Owner</b>                     | <b>Due Date</b>                                |
|---------------------------------------------------------|----------------------------------|------------------------------------------------|
| Paper to Scanned project                                | All                              | Begin 1st April '09                            |
| Replace "Red Book"                                      | All                              | 31st March '10                                 |
| Improve Can/Can't do list                               | All                              | 31st March '10                                 |
| Re-tender Treasury contract                             | All                              | 31st March '10                                 |
| Re-tender Pension Fund investment advisor               | All                              | 31st March '10                                 |
| Appoint Hexagon Approvers                               | All                              | ASAP                                           |
| Appoint 2 Transition Managers                           | All                              | ASAP                                           |
| Track investment market changes & impact on funds       | All                              | Ongoing                                        |
| Working with Revenue                                    | All                              | Ongoing                                        |
| New Bank contract                                       | All – Revenue leading            | By 28th February '10 (Live from 1st April' 10) |
| Develop Quarterly Pension Accounts                      | All                              | 31st March '10                                 |
| SAP reporting assistance                                | Patrick McGovern /Bruce Marshall | From 1st April '09                             |
| Begin input into Employer's Quarterly Newsletter        | All                              | From 1st April '09                             |
| Train stand ins for Patrick McGovern and Bruce Marshall | All                              | ASAP                                           |
| Prepare for Audits                                      | All                              | Ongoing                                        |
| Prepare for Pen Fund Committee meetings                 | All                              | Bi - Monthly                                   |
| Prepare for Head of Finance meetings                    | All                              | Monthly                                        |