PENSIONS ADMINISTRATION
Unit Operating Plan 2014-15

Issued: April 2014

2014-15 UNIT OPERATING PLAN
FOR PENSION SECTION

Please set out the annual deliverables for your Unit using the column headings and guidance notes below. Each Priority area should be consecutively numbered (Priority 1, Priority 2, etc) and each action/supporting action should have a unique number.

PRIORITIES, ACTIONS, PROGRAMMES, PROJECTS			
PRIORITY 1: KCC's standards		**Description of Priority:** Compliance with KCC standards in terms of daily operation, communication and behaviours	
No.	Description	Accountable Officer(s) / Team(s)	Unit Performance Measures / Targets / Deadlines
1.0	Work in partnership with all departments of KCC, scheme employers, scheme members and Councillors	All pension staff	Create and maintain good/professional working relationship with all interested parties
1.1	Attendance at all relevant meetings and forums	All pension staff	Appropriate staff to attend all meetings/forums
1.2	Provision of data and communication	All pension staff	Maintain a comprehensive communications policy and respond to all requests for appropriate data
1.3	Ensure compliance with all KCC employment policies and codes of conduct	All pension staff	Staff to read and understand the requirements of the KCC employment codes of conduct

Please set out the annual deliverables for your Unit using the column headings and guidance notes below. Each Priority area should be consecutively numbered (Priority 1, Priority 2, etc) and each action/supporting action should have a unique number.

PRIORITIES, ACTIONS, PROGRAMMES, PROJECTS		
PRIORITY 2: Administration of the Local Government, Police and Fire Pension Schemes	**Description of Priority:** Provide a comprehensive administration service, in respect of the LGPS, Police and Fire Pension Schemes, to all interested parties	
No.	Description	Accountable Officer(s) / Team(s)	Unit Performance Measures / Targets / Deadlines
2.0	The section works collaboratively with scheme employers to provide scheme members with a compliant and comprehensive administration service in accordance with all existing and future legislative regulations/requirements	All pension staff	

Please set out the annual deliverables for your Unit using the column headings and guidance notes below. Each Priority area should be consecutively numbered (Priority 1, Priority 2, etc) and each action/supporting action should have a unique number.

PRIORITIES, ACTIONS, PROGRAMMES, PROJECTS		
PRIORITY 3: Communication		**Description of Priority:** To maintain a communications policy, which when fully implemented, ensures clear and comprehensive information to all clients and partners, is provided in a timely fashion.
No.	Description	Accountable Officer(s) / Team(s)	Unit Performance Measures / Targets / Deadlines
3.0	Create and update the Communications policy of the Pension Section	Pension Manager	Plan agreed and published on website
3.1	Implement the communications policy as published	Pension Manager/Scheme Events & Member Communications Consultant/Employer Liaison Consultant	

PRIORITIES, ACTIONS, PROGRAMMES, PROJECTS		
PRIORITY 4: Administration software system		**Description of Priority:** Select and implement new software system
No.	Description	Accountable Officer(s) / Team(s)	Unit Performance Measures / Targets / Deadlines
4.0	**Move to new software system**		
4.1	Agree the selection of software provider and sign contract	HFS/PM	Contract agreed and signed
4.2	Agree project plan and implementation timetable	PM	Plan agreed and published
4.2	Identify key risks in implementation and plan to minimise and mitigate against these risks	PM	Risks identified, recorded and mitigation plans agreed
4.4	Select internal staff to deal with project implementation. Agree key tasks and deadlines	PM	Team selected and advised of key tasks and deadlines
4.5	Identify KCC (non pension) agents to be involved in implementation and agree plan to ensure collaborative process	PM	Agents identified and plan agreed to ensure collaborative actions
4.6	Plan meetings during implementation to review progress and ensure completion of transition by 1 January 2015	PM/Implementation Team and KCC partners software providers	System in place and working by 1 January 2015

PRIORITIES, ACTIONS, PROGRAMMES, PROJECTS

PRIORITY 5: New LGPS 2014		**Description of Priority:** Introduce the new LGPS 2014 scheme	
No.	Description	Accountable Officer(s) / Team(s)	Unit Performance Measures / Targets / Deadlines
5.0	**New LGPS 2014**		
5.1	Monitor and have working understanding of new scheme regulations	PM/Technical Consultants	
5.2	In conjunction with Pension Manager groups, partners, LGA and other interested bodies, agree impact of new regulations on scheme members, employers, Administration Authority	PM/Technical Consultants	
5.3	Communicate and train appropriate staff: • Employers • Scheme members • Pension Fund Committee • Pension Section staff	PM/Technical Consultants and Employer Liaison Team	
5.4	Change all documentation, pension website and processes as required by new scheme and elements of the Legacy Scheme for section, employers and scheme members	Technical Consultants/Employer Liaison Consultant/Scheme Events and Member Communication Consultants	
5.5	Implement the administration of the new scheme from 1 April 2014 as far as is possible under published and agreed regulations	PM/Technical Consultants/Team Managers	
5.6	Maintain and implement any necessary changes to encompass post April 2014 changes to regulations	PM/Technical Consultants/Team Managers	

PRIORITIES, ACTIONS, PROGRAMMES, PROJECTS

PRIORITY 6: Key Performance Indicators		**Description of Priority:** Meet, monitor and report achievements against KPI targets	
No.	Description	Accountable Officer(s) / Team(s)	Unit Performance Measures / Targets / Deadlines
6.0	**Key Performance Indicators**		
6.1	Maintain KPIs to agreed turnaround times	Team Managers	KPIs maintained within set deadlines and reported to Pension Fund Committee and Finance Dashboard as required
6.2	Report to Pension Manager monthly	Team Managers	

PRIORITIES, ACTIONS, PROGRAMMES, PROJECTS

PRIORITY 7: Budget Monitoring		**Description of Priority:** Monitor budget on a monthly basis and report to HFS	
No.	Description	Accountable Officer(s) / Team(s)	Unit Performance Measures / Targets / Deadlines
7.0	**Budget control**		
7.1	Monitor the section budget on a monthly basis and advise variances to Finance Director	PM	Meet monthly deadlines

PRIORITIES, ACTIONS, PROGRAMMES, PROJECTS

PRIORITY 8: Section structure and recruitment		Description of Priority: Create a structure for the section, to meet the demands of the next 5 years	
No.	Description	Accountable Officer(s) / Team(s)	Unit Performance Measures / Targets / Deadlines
8.0	**Section structure**		
8.1	Consider structural requirements of section to include: • Post 2014 scheme changes • System/technology changes • Employer data stream technology • Member self service	PM	Structure agreed with HFS and all new JDs agreed and evaluated by 31 March 2015
8.2	Set out resource requirements, layers of management, team sizes, communication/support requirements, training and all other elements of functional activity to fit KCC model	PM	
8.3	Agree with HFS	PM	
8.4	Prepare structure, any new JDs and proceed	PM	
8.5	Consider all vacancies/new posts in the revised section structure	PM	
8.6	Recruit to posts in 8.5 above as work demands	PM/Pension Consultants/Team Managers	

PRIORITIES, ACTIONS, PROGRAMMES, PROJECTS			
PRIORITY 9: Automatic Enrolment		**Description of Priority:** Implement Automatic Entitlement	
No.	Description	Accountable Officer(s) / Team(s)	Unit Performance Measures / Targets / Deadlines
9.0	**Automatic Enrolment**		
9.1	Ascertain and record staging dates for all employers in the Kent Pension Fund	PM/Employer Liaison Team	Undertake to assist all employers to implement AE at their respective staging dates
9.2	Assist employers by facilitating employers actions to ensure compliance with legislation	PM/Employer Liaison Team	

PRIORITIES, ACTIONS, PROGRAMMES, PROJECTS

PRIORITY 10: Premises move		**Description of Priority:** Monitor and implement any plans to move premises under FTC	
No.	Description	Accountable Officer(s) / Team(s)	Unit Performance Measures / Targets / Deadlines
10.0	**Keep in view potential move to new premises**	PM	
10.1	Keep in view the plans to streamline Strategic HQ premises	PM	
10.2	In event of move for Pension Section consider the risks/challenges	PM	
10.3	Communicate risks and challenges to project team and agree plan to minimise risks	PM	
10.4	Implement an agreed plan to relocate the Pension Section, taking full account of risks identified	PM	

PRIORITIES, ACTIONS, PROGRAMMES, PROJECTS

PRIORITY 11: Facing the challenge		Description of Priority: Actively support the FTC initiative and communicate to staff	
No.	Description	Accountable Officer(s) / Team(s)	Unit Performance Measures / Targets / Deadlines
11.0	**Facing the Challenge**	PM	
11.1	Remain aware of any potential impact of FCT on Pension Section	PM	
11.2	Communicate changes to section staff as they are confirmed by senior management	PM	
11.3	Communicate and feedback to the FTC Project Team	PM	

PRIORITIES, ACTIONS, PROGRAMMES, PROJECTS

PRIORITY 12: New Police and Fire Schemes		**Description of Priority:** Prepare for introduction of new Police and Fire schemes	
No.	Description	Accountable Officer(s) / Team(s)	Unit Performance Measures / Targets / Deadlines
12.0	**New Police and Fire Schemes 2015**		
12.1	Monitor and have working understanding of new scheme regulations	PM/Technical Consultants/TMs responsible for P&F	
12.2	Communicate and train appropriate staff: • Police and Fire Authorities • Scheme members • Pension Section staff	PM/Technical Consultants and Employer Liaison Consultant/TMs responsible for P&F	
12.3	Change all documentation, pension website and processes as required	Technical Consultants/Employer Liaison Consultant/Scheme Events and Member Communication Consultants/TMs responsible for P&F	