

PENSIONS ADMINISTRATION TRANSITION (PAT) PROJECT - HIGH-LEVEL PROJECT PLAN

DATE: 2 June 2020

This high-level transition plan is intended to describe the overall plan for the project and details the specific events and milestones.

Milestones	Task	Start	Finish	Milestone Date	Responsibility
Contract Award	<ul style="list-style-type: none"> Contract awarded to WYPF Project Initiation Meeting Project Plan Contract Negotiations Contract Signature 	4 March 2020 16 March 2020 16 March 2020 4 March 2020	4 March 2020 16 March 2020 31 March 2020 30 June 2020	30 June 2020	LBB WYPF/LBB/CAP WYPF/LBB/CAP WYPF/LBB WYPF/LBB
Communications	<ul style="list-style-type: none"> Prepare Communications plan for all stakeholders Issue Benefits Statements LBB Website Employers Meeting 	16 March 2020 1 May 2020 1 June 2020	31 March 2020 31 August 2020 30 Sept 2020	24 Sept 2020	WYPF/LBB LBB/CAP WYPF/LBB
Operational Interfaces	<ul style="list-style-type: none"> Employer return pilot Agree policies and procedures Agree WIP transfer arrangements 	1 June 2020	30 Sept 2020	30 Sept 2020 30 Sept 2020	LBB LBB/WYPF LBB/WYPF/CAP
Finance	<ul style="list-style-type: none"> Agree LBB requirements Capita Bank Accounts and reconciliation Overpayments and debtors Third parties/HMRC WIP handover (HMRC) 	1 July 2020 1 June 2020 1 July 2020	31 July 2020 14 Dec 2020 16 Nov 2020	31 July 2020 14 Dec 2020 16 Nov 2020 30 Sept 2020 31 Oct 2020	LBB/WYPF CAP
TUPE	<ul style="list-style-type: none"> Staff consultation Staff transfers confirmed Staff induction/training 	1 May 2020 1 August 2020 1 Oct 2020	31 July 2020 30 Sept 2020 31 Oct 2020	1 Nov 2020	WYPF/CAP WYPF/CAP WYPF/CAP

	<ul style="list-style-type: none"> • Staff transfer 				
Data Requirements	<ul style="list-style-type: none"> • 1st data cut • 2nd data cut • Live data cut 	21 May 2020 23 July 2020 7 Oct 2020	27 May 2020 30 May 2020 22 Oct 2020		WYPF/LBB/CAP WYPF/LBB/CAP WYPF/LBB/CAP
Employers Website	<ul style="list-style-type: none"> • Create website • Training to LBB Employers 				WYPF WYPF
Transfer of work in progress	<ul style="list-style-type: none"> • Provide details of work in progress to WYPF • Transfer work in progress to WYPF 	15 Oct 2020	30 Oct 2020	15 Oct 2020	LBB/CAP WYPF/LBB/CAP
Go Live	<ul style="list-style-type: none"> • Live running at WYPF • Project Conclusion Meeting 			1 Nov 2020 29 Jan 2020	WYPF WYPF/LBB/CAP

