

# Project Highlight Report: Pensions Administration Transition

<b>Project Name:</b>	Pensions Administration Transition (PAT)		
<b>Project sponsor:</b>	Anisa Darr	<b>Reference number:</b>	Period 4
<b>Project Director:</b>	Nigel Keogh	<b>Report period:</b>	July 2020
<b>Report Summary:</b> (Overall progress and what has changed since the last report)	<p>Good progress continues to be made across all work streams. WYPF continue to review the data received from the first data cut and queries continue to be resolved on a timely basis. Payroll and member record build continues. On 20 July 2020, the Project Team agreed that the second data cut be deferred to August 2020 to confirm the member record and payroll builds at WYPF. Individual staff consultations regarding TUPE are continuing. Formal consultation due to conclude on 31 July. First member communications have been agreed and will be issued with ABS – employers have been notified via employer newsletter. WYPF and LBB are liaising regarding policies and procedures going forward. The employer monthly return pilot continues, with 6 employers now participating. Finance workstream actions are on track, with LBB/WYPF interfaces being developed. Project Managers continue to meet weekly to monitor potential COVID-19 impacts. Project Team continues to meet fortnightly to report progress and review workstream task lists for completeness. LBB Internal Audit (IA) is due to commence an audit of the transition project on 27 July. The Project Director will be liaising with IA throughout and will keep the Project Board apprised of progress and findings</p>		

## Project Summary

### Key indicators & Direction of Travel

Direction of travel guidance			Rag guidance		
→	Horizontal	Same RAG as previous highlight report	G	Green	No deviation, plan is on track
↗	Tilted upward	Better RAG than previous report	A	Amber	Deviation is likely – mitigation is being planned to remain on track
↘	Tilted downward	Worse RAG than previous report	R	Red	Deviation has occurred – decision is needed immediately

OVERALL	→	On track	
CATEGORY	Direction of Travel	Comment	RAG
TIME	→	1 November deadline remains viable.	
COST	→	No cost issues at present	
QUALITY	→	No quality concerns at present	
RESOURCES	→	Sufficient resource being made available	

## Section 1: Schedule & Key Milestones

Key Milestones	Planned Date	Actual/Forecasted Date	Slippage	Comments	RAG
First data cut	21/05/2020	21/05/2020	None	Data extract completed and received by WYPF. WYPF continue to review the files received.	Com

Second data cut	23/07/2020	20/08/2020	Planned	The Project Team have concluded that a second data cut is required to test the WYPF build but should be deferred to August. The process will commence 20 August and should be completed by 27 August 2020.	G
Final data cut	16/10/2020	16/10/2020	None	Capita to cease payroll input for mid-month payroll on 7 October. Capita to cease payroll input for end-month payroll and member record updating 15 October 2020.	G
WYPF commence live service	01/11/2020	01/11/2020	None		G

### Section 3: Summary of Top Risks

Note: grey boxes indicate risks that have been previously reported but remain in the highlight report for on-going monitoring due to their overall probability and impact. **Bold** indicates new items.

Description	Controls and mitigations in place	Risk Owner	Nature of Risk	Residual Risk (with controls in place)			Target Risk	
				Impact	Likelihood	Score	Impact	Likelihood
No new risks identified								

### Section 4: Summary of Top Issues

Note: grey boxes indicate issues that have been previously reported but remain in the highlight report for on-going monitoring due to their overall impact. **Bold** indicates new items.

Decision, Action or Escalate	Description	Cause/Consequence	Action(s) in place	Assigned To	Nature	Impact	Score
	<b>None to report</b>						

### Section 5: Dependencies / Enablers

Description	Action Required	Assigned to	Target Date	Forecast Date	RAG
None in addition to those set out in the PID					