

Initial meeting to discuss the delivery of paid exits

This guide is for employers attending an early commissioning, face-to-face/ telekit meeting.

1. Who is involved in an early commissioning meeting?

- The employer
- The shared service or provider or payroll provider
- The scheme administrator (MyCSP)

2. What's the purpose of this meeting?

This initial early commissioning meeting will help you to plan the delivery of your exit scheme, and in general will help you to:

- Define the scope of your exit scheme
- Identify the roles and responsibilities of those involved
- Agree critical milestones
- Agree the ongoing governance of your scheme's delivery, e.g. stakeholder meetings.

If your exit scheme exceeds 50 employees, or if there has been a significant change in your organisation's HR personnel, you're required to attend an early commissioning meeting. Exit schemes affecting less than 50 employees do not require an early commissioning meeting (unless requested by the scheme administrator) but will be subject to the same parameters.

During this meeting, several topic areas will be discussed (see below) and all parties will be required to sign an agreement, which will be used as a basis for subsequent meetings.

3. Areas for discussion

Employer

- 1 Prior to the meeting the employer will:
 1. Make a booking with MyCSP for the early commissioning meeting and discuss availability for delivery of the scheme. Inform SSC ...
 2. Provide completed Part 1 of F1 Form including employer details (rest of completed form to be submitted before scheme commences)
 3. Contact Share Service Provider or Payroll regarding exit numbers and timeline

NB: employers and payroll provider to travel to MyCSP (if required).
- 2 At the meeting the employer will:
 1. Outline ultimate time of exits including any flexibility during any of the phases
 2. Discuss requirements (numbers and possible timeline for exits)
 3. Provide additional requirements such as quotes/awards in PDF format
 4. Agree queries timeline for quotes and subsequent awards
 5. Agree timeline for all normal queries. Timeline for queries relating to previous pension/TUPE or other will need to be agreed either at this meeting or at the following review meetings once detail of employee's pay and pension history is known
 6. Agree that any variations in requirements e.g. increase or decrease in numbers will be subject to further discussion with MyCSP, shared services or payroll provider
 7. Discuss and agree roles and responsibilities

Shared services or payroll provider

- 3 At the meeting:
1. Discuss and agree data cleansing required and timeline for completion
 2. Provide scheduled calendar for data cleansing to ensure all stakeholders can sign up to agreed timeline for delivery
 3. Agree to take part in scheduled review meetings

MyCSP

- 4 Prior to the meeting, MyCSP will have provisionally booked scheme(s) with the employer.
At the meeting MyCSP will:
1. Provide for discussion their calendar with work already booked in to ensure all parties aware
 2. Discuss availability for delivery of the scheme
 3. Provide projected timeline for delivery of quotes and subsequent awards
 4. Provide scheme guidance
 5. Consider and discuss reduction of costs for quotes and awards where data is cleansed and ready

All

- 5 All stakeholders will:
1. Agree and sign up to the project timeline
 2. Agree costs for the scheme before launch, agree and provide details of single points of contacts for the project
 3. Agree the timings of regular update meetings throughout the project

4 This agreement is valid from the date of the first meeting of all stakeholders until satisfactory delivery of the exit scheme requirements. This agreement will be used as a basis for each subsequent meeting and updated as necessary.

Employer Name

Sign

Date

MyCSP

Sign

Date

Shared service/payroll provider

Sign

Date