

Your project plan

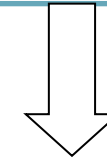
The section includes some key points to consider when developing your project plan.

For you to be able to use this plan you will need to determine your start dates and allocate resources to the activities.

The length of time taken to complete the activities will depend on the resources available and the size of your organisation. We have left the last column blank so that you can fill in your own dates, and also a 'your comments' section for you to make

You need to complete this section

Your comments box can be used to make notes on your plan



Activity	When?	Responsible?	What is it?	What do you need to do to prepare?	Target Date
1 Enhanced Data Validation Document	February 2014	MyCSP	Document to inform you of the interface validation changes and actions you need to carry out;	Ensure you understand this document and the impacts to your business, and that the relevant parties within your organisation review this document.	

				Your comments:
2 Detailed Employer Impacts Document	March 2014	2015 Programme	Document to provide the next level of detail on Migration, New Joiners / Re-joiners, Payroll Interface and Process Changes, Effective Pension Age and Retrospective Earning Adjustments.	<p>Ensure you understand this document and the impacts to your business, and that the relevant parties review this document.</p> <p>Your comments:</p>
3 Provide key contact details	March 2014	You	The Programme requires you to update key contact details. A request will be submitted to you via an EPN.	<p>Send your key contact details to 2015employers@cabinet-office.gsi.gov.uk</p> <p>Your comments:</p>
4 Employer Engagement Strategy	March 2014	2015 Programme	Documented approach about how 2015 Programme will engage and support you and assess your readiness to implement the 2015 scheme changes.	<p>Review strategy. Larger Employers will be engaged with on a 1-2-1 basis; small employers will have the opportunity to talk with the Employer Engagement leads on conference calls. Any major concerns should be raised via 2015employers@cabinet-office.gsi.gov.uk</p> <p>Your comments:</p>

5 Confirm Distribution Preference	February 2014	You	You should confirm whether your Options Packs will go direct to members or if you would like to manage the distribution.	MyCSP will assume your distribution approach will be the same as the Additional Contributions letters unless informed otherwise. If you would like to change your distribution approach please inform dawn.clarke@mycsp.co.uk
Your comments:				
6 Data Cleanse Reports	February 2014	MyCSP	You should have received your data cleanse reports.	Work with the MyCSP data cleanse team to complete data cleanse items; for any issues contact dataintegrity@mycsp.co.uk
Your comments:				
7 Signpost members to communications products	February 2014	You	The 2015 Programme published updated information about the new scheme in early February 2014. You should be signposting members to this content and providing hard copies to those members	Signpost members to communications materials Your comments:

			who do not have internet access.	
8 Prepare your project plan and gain approval from the designated manager who is responsible for the 2015 changes in your organisation	Prior to April 2014	You	Complete the next few pages of this document and produce an outline of how you are planning to implement the 2015 scheme changes. You should get approval of your plan from the designated manager responsible for the 2015 changes.	Use the activities outlined in this document to clarify how you will approach the 2015 scheme changes and set up a project file. Your comments:
9 Initiate Internal Project Meeting	Prior to April 2014	You	Introduction to the 2015 scheme changes and those who will be working to implement it.	Set-up regular meetings to report, monitor and track progress / risks / issues. Your comments:
10 Complete self-assessment 1	April 2014; July 2014, October 2014 and January 2015.	You	Use the self-assessments in this document to rate your readiness on each of the points which need to be addressed.	Go through self-assessment stage by stage. If you are not rating yourself as 2 on each point you will need to go back and put more detailed plans in place. If you have any issues raise these with the Employer Engagement leads Submit your reports to

				2015employers@cabinet-office.gsi.gov.uk
				Your comments:
11 1-2-1 Assessments / Conference Calls	April 2014; July 2014, October 2014 and January 2015.	All	The Employer Engagement Leads will meet with you to discuss your self-assessment either face to face or on the phone and will then assess your overall readiness.	Attend conference calls / 1-2-1 sessions. Where 1-2-1 sessions are requested you will need to arrange a meeting room facility, and ensure availability of key staff working on the 2015 scheme changes. Refer to your April checklist for more information to prepare Your comments:
12 Share Payroll Developers Guide	April 2014	You	Payroll Developers Guide and other key documentation that is available will enable Payroll systems teams to implement the necessary changes.	Ensure Payroll systems teams or whoever provides your IT services are engaged and have received the Payroll Developers Guide and other key documentation that is available Your comments:
13 Complete Data Cleanse for Tapered Enrolment Group	May 2014	You/MyCSP	You will have been working over the last couple of	Data cleanse complete for Tapered Enrolment Group

			months with the Data Integrity Team to resolve any data issues by the 31 st of May 2014 on the Tapered Enrolment Group.	Your comments:
14 Agree approach for managing distribution of Options Packs to members (where applicable)	July 2014	You	Where you have opted to receive Options Packs – the packs must be distributed as quickly as possible.	Put a process in place to ensure the most effective and secure method of distribution Consider maternity leave, long term sick, secondments as part of your planning Your comments:
15 Develop training plans	July 2014	You	You will need to develop training plans for all of the IT and business changes you are making.	Develop training plans Your comments:
16 Signpost members to communications products	August 2014	You	The 2015 Programme published updated information about the new scheme at the end of July 2014. You should be signposting members to this content and providing hard	You must not amend or adapt any of the 2015 Programme communications material or branding. You must ensure that the communications are not

			copies to those members who do not have internet access.	interpreted as financial advice. We expect you to signpost members to the scheme communications on our website
17 Finalise member address	August 2014	You	You will have been working on member addresses through the data cleanse exercise, but you should do a final check in August to ensure the up to date address is on the interface prior to the Options Packs being distributed.	Run an exercise with your members to ensure any house moves have been captured and updated on the interface Your comments:
18 IT Development	July 2014	You	We have included this as a guide: we expect you to be entering the development stages of your IT change, or be near to it.	Liaise with IT partners early, and provide the Payroll Developers guide to them in April 2014. Your Comments:
19 Confirm delivery and storage arrangements / process for receiving the Options Packs	September 2014	You	Where you have a large workforce there could be several boxes.	Each pack contains confidential financial information and needs to be securely stored from the period between receipt and distribution

				to members. Your comments:
20 Receive Options Packs and put into safe storage	On receipt of packs (October 2014)	You	Member packs will be delivered for the attention of your 2015 lead.	Receive and sign for the delivery and then store in line with activity. Whilst the majority of packs will be sent in one delivery, it is possible that a number of smaller deliveries will follow. Your comments:
21 Distribute Option Packs	On receipt of packs and within 1 week	You	You have around 1 week to distribute the Options Packs. Remember any delays could impact the member's time in which to make their choice.	You may wish to hand deliver or hold a drop in session, factor in people on annual leave, maternity etc. and know what to do with packs that were not collected / refused / not in your employment etc. It may be good practice to obtain a signature from each member to confirm receipt. Your comments:
22 List of members who have been sent an Options Pack	Oct 2014	MyCSP	MyCSP will send a list of members who were sent an	You may want to keep this to cross reference with what you have

			Options Pack.	distributed
				Your comments:
23 Signpost members to communications products	November 2014	You	The 2015 Programme published updated information about the new scheme at the end of October 2014. You should be signposting members to this content and providing hard copies to those members who do not have internet access.	<p>You must not amend or adapt any of the 2015 Programme communications material or branding.</p> <p>You must ensure that the communications are not interpreted as financial advice.</p> <p>Your comments:</p>
24 IT Testing	November 2014	You	We have included this as a guide: we expect you to be entering the testing stages of your IT change, or be near to it.	<p>Liaise with IT partners</p> <p>Test the solution and align to business processes</p> <p>Your Comments</p>
25 Training	January 2015	You	You will need to design and deliver training around your	<p>Identify training requirements</p> <p>Identify staff that need to be</p>

		system and business change.	trained Deliver training	Your comments:
26 Member migration / new scheme implementation	April 2015	You	You will be ready to migrate members into the new scheme for the 1 st of April 2015.	Migrate members Ensure everyone is trained Ensure people aware of how long the migration exercise will last Your comments: