Highlight Report – **New System.** – Project Phase Delivery.

Date of Report:	10 February 2020		
Period Covered	21 January – 10 February		
Prepared by:	Chloe Painter		
Sponsor	Tom Lewis	**Customer**	Pensions
Proposed RAG Status	**Green**		
Projected Costs		**Actual Cost**	

Commentary :

Tom Lewis has been engaging with all pension funds regarding the procurement strategy of setting up a single supplier framework for the funds to call off. East Sussex have agreed to be named on the procurement for the Orbis Pension Administration System. This is due to go to open market on 9 March 2020.

This week the functional specification has been workshopped with internal stakeholders and amendments have been made. The procurement process is also going to include supplier demos for bidders to demonstrate areas of the system that have been identified as key functionalities of pension administration. These demos will include:

- Calculations
- Portals for members, funds and employers
- Auto task allocation and workflow
- Payroll monthly data exchange
- Reporting, analytics and annual events

IT have been engaged for this project and are aware of the scale of work.

Sarah Spence has now joined the Pension Transformation Team and will be the Project Manager on this project.

Upcoming Milestones

Item	Due	Status
Business Case Sign Off	06/12/2019	**Complete**
SGB Sign Off	15/02/2020	**On Schedule**
Fund engagement regarding procurement dates.	15/02/2020	**On schedule**
Functional spec sign off	28/02/2020	**On schedule**
Procurement begins	09/03/2020	**On Schedule**

Board Actions

Up-Coming:

- SGB sign off
- Finalise agreement with funds for Surrey to procure on their behalf.
- Procurement exercise to begin

Key Risks and Issues in this period.

Item	RAG	Detail	Action/Update
Heywards Contract Length	**Amber**	**Heyward's only offer a 5 year contract for funds. This is longer than 3 1+1 we would like**	**Funds to be encouraged to enter full procurement for the system or if they do wish to extend on a 5 year with a 3 year break clause as per ESSC.**