

## Highlight Report – Address Tracing – Project Phase: In Delivery

<b>Date of Report:</b>	5 February 2020			<b>Upcoming Milestones</b>		
<b>Period Covered</b>	20 January 2020 – 5 February 2020			<b>Item</b>	<b>Due</b>	<b>Status</b>
<b>Prepared by:</b>	Chloe Painter			Electronic Trace completed and results returned from ITM	21 <sup>st</sup> Nov	<b>Complete</b>
<b>Sponsor</b>	Tom Lewis	<b>Customer</b>	Surrey, East Sussex, Hillingdon, Hammersmith & Fulham and Kensington & Chelsea Pension Funds	Decision from funds on approach to results	24 <sup>th</sup> Jan	<b>Complete</b>
<b>Proposed RAG Status</b>	<b>Green</b>			Decision from funds on next steps	24th Jan	<b>Complete</b>
<b>Projected Costs</b>	£97,407.20 (Across all funds)	<b>Actual Cost</b>	Invoiced as of 14.01.20 £19,272.55 (Across all funds)	Interface electronic results for funds on Altair	28 Feb	<b>Complete</b>
<b>Commentary</b>				ITM carry out full trace	30 April	<b>On Schedule</b>
<p>ITM have completed the electronic trace and are now carrying out the full trace on members who could not be traced in the electronic trace exercise.</p> <p>The electronic trace results confirmed that 4294 members now live at a new address, and these addresses have now been updated on Altair. The cost of the electronic trace for East Sussex was £6,915.90</p> <p>The full trace exercise is now underway, with an estimated cost of £20,052.25. The results for this typically take 10 – 12 weeks as this is a more lengthy process.</p>						

### Board Actions

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### Key Risks

Item	RAG	Detail	Action/Update
<b>Costs</b>		ITM estimated a low cost for this work, however the results from the initial trace indicate that the proposed costs will be exceeded. The higher costs may have an impact on the funds agreeing to the full trace, and also	The funds do not have to agree to the full trace, however it is recommended they do in order to improve data quality. The options paper will outline the reason for the higher cost

		take the project costs above the procurement threshold, so this will also need to be addressed.	

Key Issues

Item	Detail	Action/Update