

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

Date of Report:	10 February 2020			Upcoming Milestones		
Period Covered	21 January – 10 February			Item	Due	Status
Prepared by:	Chloe Painter			Business Case Sign Off	06/12/2019	Complete
Sponsor	Tom Lewis	Customer	Pensions			
Proposed RAG Status	Green					
Projected Costs		Actual Cost				
Commentary :						
<p>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.</p> <p>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:</p> <ul style="list-style-type: none"><li>• Calculations</li><li>• Portals for members, funds and employers</li><li>• Auto task allocation and workflow</li><li>• Payroll monthly data exchange</li><li>• Reporting, analytics and annual events</li></ul> <p>IT have been engaged for this project and are aware of the scale of work.</p> <p>Sarah Spence has now joined the Pension Transformation Team and will be the Project Manager on this project.</p>				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.