

The Single Public Service Pension Scheme

Action Plan 2021/2022

Supporting the Administration of the Single Pension Scheme



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1. Key Objectives

The purpose of this plan is to set out the actions to be taken by Relevant Authorities (RAs), supported by Department of Public Expenditure and Reform (DPER), in the next two years with a view to ensuring that the Single Pension Scheme is administered effectively and in accordance with legal requirements.

These actions will include:

- Relevant Authorities ensuring compliant and consistent administration of the Single Pension Scheme;
- Relevant Authorities ensuring the Single Scheme Databank is populated with complete and accurate data; and
- Provision by DPER of training, central policy and administrative guidance, support and advice.

2. Background

The Single Public Service Pension Scheme or ‘Single Scheme’ was introduced via the Public Service Pensions (Single Scheme and Other Provisions) Act 2012 (Hereafter referred to as ‘the 2012 Act’). The introduction of the Single Scheme is the biggest change to public pensions since the formation of the state and it has been instrumental in ensuring the sustainability of the Public Service pension bill for decades to come. The Baseline Report on the introduction of the Scheme in 2014 outlined challenges in administering the Scheme. As a result, since 2017, Relevant Authorities have been supported by DPER in Scheme administration through the provision of training, guidance, online supports with resources for administrators and members and a dedicated Helpdesk to deal with queries. While Relevant Authority compliance has grown significantly in recent years, full compliance has yet to be reached.

The Single Scheme is currently being administered by the various public service employers or ‘Relevant Authorities’ (RAs). There are over 350 designated Relevant Authorities, of which 297 had members by year-end 2020. Membership of the Single Scheme has increased substantially since its introduction in 2013 and currently stands at approximately 166,000 (2021 Annual Survey).

The Scheme:

- is a career average defined benefit scheme rather than a final salary scheme, requiring Relevant Authorities to calculate contributions and retirement benefits in every pay period with reference to a member’s actual earnings and work pattern/FTE;
- applies to every “public service body” as defined in the 2012 Act comprising in excess of 350 legally designated Relevant Authorities; and

- Retirement benefits earned in prior years must be revalued annually in line with positive increases to the Consumer Price Index (CPI) published by the Central Statistics Office (CSO).

The career-average nature of Scheme means that Scheme administration is now ‘front loaded’ rather than taking place on the retirement/death of a member as is generally the case with final salary public service pension schemes.

Scheme membership will continue to grow with numbers expected to surpass 200,000 by year end 2025. **Chart 1** below sets out the membership trend since the Scheme came into effect in 2013.

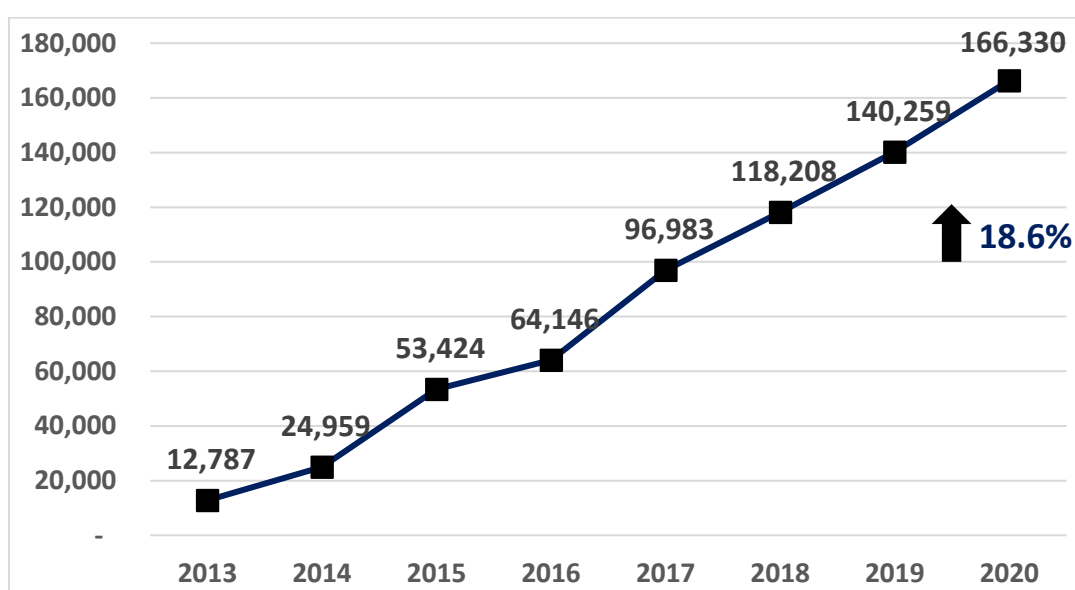


Chart 1: Single Scheme – Active Member Growth (2013 – 2020)

Each Relevant Authority remits aggregate contributions collected from of its Single Scheme members to the Exchequer. In addition, the 2012 Act imposes considerable requirements on public service employers, including a legal requirement to issue Annual Benefit Statements (ABS) to members, setting out contributions collected and retirement benefits earned in the Scheme year to which the ABS relates.

The Single Scheme is complex to administer and the majority “standard accrual” membership has two pension benefit accrual rates, which requires that Scheme benefits accrued are calculated on a pay period basis, rather than on an annual basis. This represents a significant change from pre-existing final salary and service based pensions, in which member benefits are calculated at retirement.

Accountability and Governance

Accountability for implementation and operation of the Single Scheme is with the individual Relevant Authorities, as set out in Section 43 of the the 2012 Act.

The focus of this Action Plan is to bring about full compliance in the following core administrative areas:

- The calculation and recording of member retirement benefits or “referable amounts” in each pay period;
- The issuing of Annual Benefit Statements to all members by 30th June each year; and
- The issuing of Leaving Service Options and Leaver Statements within six months of a member leaving pensionable employment.

Although not an exhaustive list, Relevant Authorities are also responsible for the following administrative actions:

- Assign new hires to the correct pension scheme;
- Enable members to repay refunded contributions and restore former benefits accrued if they re-join the public service in a pensionable capacity;
- Calculate, collect and remit all member contributions monthly;
- Allow members to Purchase extra referable amounts to augment their benefits;
- Allow Transfer Values to be accepted into the Scheme from Revenue approved occupational pension schemes in order to purchase extra referable amounts;
- Submit all member records to the Single Scheme Databank; and
- Calculate and pay member retirement/death benefits.

To oversee this implementation of this Action Plan, the following Governance structure will be put in place.

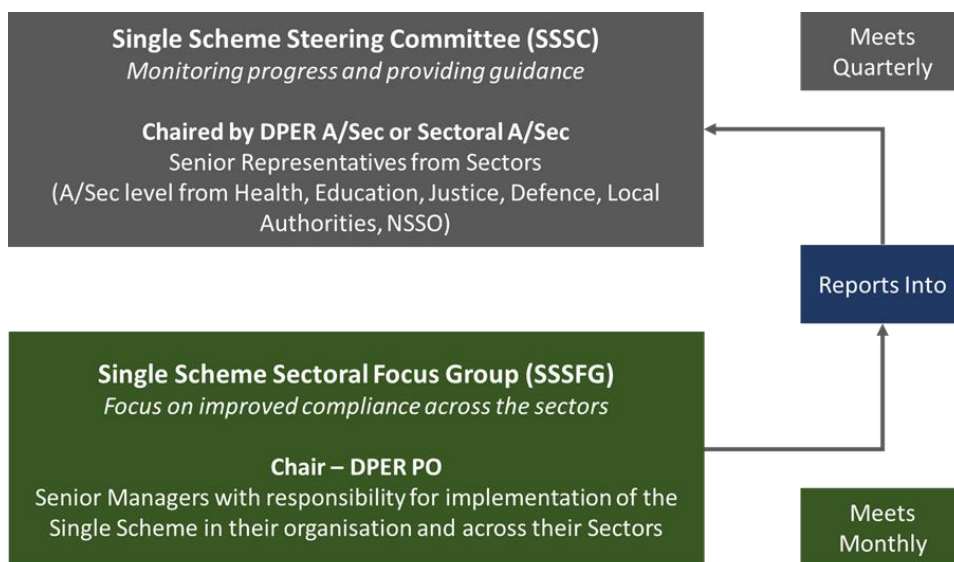


Figure 1: Governance Structure

Reporting

The Sectors and RAs will report progress made in achieving compliance and updates against planned targets at monthly Sectoral Focus Meetings (chaired by DPER). Each quarter,

overseeing Departments will provide written updates on progress against targets to the Single Scheme Steering Committee (SSSC).

In order to ensure that a sustained focus is maintained throughout the lifetime of this plan, an escalation pathway has been defined (Figure 2 below) where Relevant Authority non-compliance has been identified. This process allows for deeper engagement between Relevant Authorities and DPER as required to resolve compliance issues.

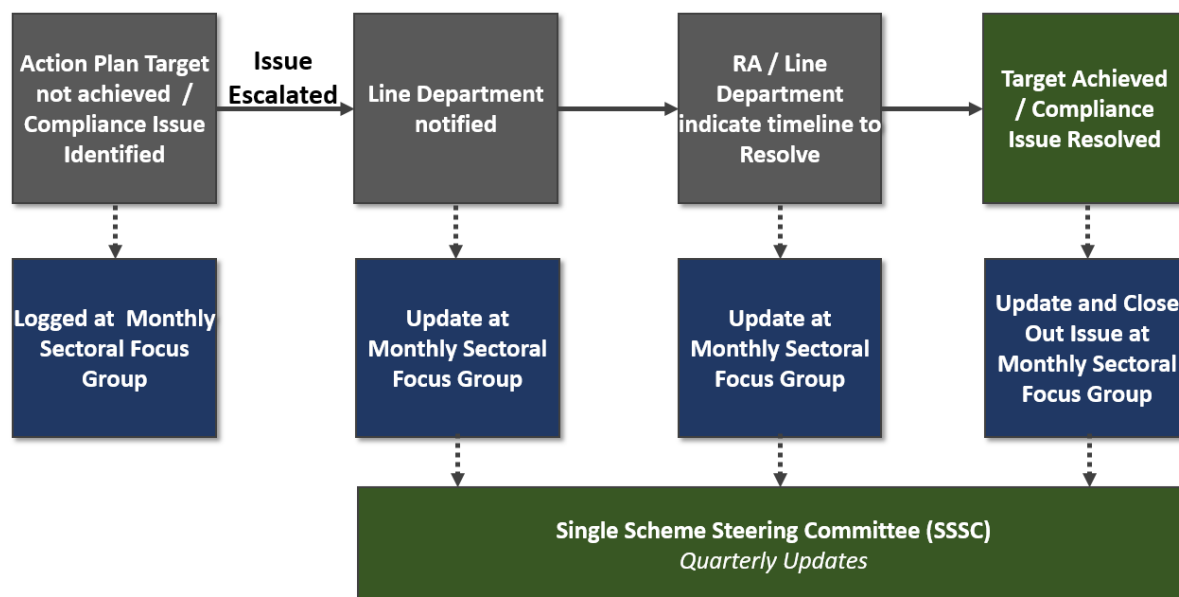


Figure 2: Non-Compliance – Escalation Framework

Role of the Pensions Authority

The Pensions Authority regulates occupational pension schemes, Trust RACs and Personal Retirement Savings Accounts (PRSAs) in the Republic of Ireland. The Pensions Authority is a statutory body set up under the Pensions Act, 1990.

The Authority supervises compliance within what is set out in the Pensions Act 1990 (as amended). This means that it has a role in ensuring that all Relevant Authorities are complying with the provisions of the Pensions Act and attendant regulations which apply to public service pension schemes.

The Authority has carried out over one-hundred audits of Relevant Authorities to date and will continue to have a role into the future monitoring of compliance with the Pensions Act, in particular in relation to the administration of the Scheme and the disclosure of information to members, provided for in Disclosure of Information regulations.

The Authority has a range of enforcement powers at its disposal, including powers to impose fines and to take prosecution action where breaches of the Pensions Act have been identified.

The Single Scheme Steering Committee will liaise with the Pensions Authority in the context of its statutory role.

Action Plan Annual Review

From Q4 2021, DPER will compile an Annual Review based on the targets and actions as set out in this plan. The annual review will indicate the compliance levels attained by each sector and progress made in the year under review. The Action Plan Annual Review will be presented to Government.

3. Driving Compliance

There are three main benchmarks of Single Scheme compliance:

1. The calculation and recording of member retirement benefits or “referable amounts” in each pay period;
2. The issuing of Annual Benefit Statements to all members by 30th June each year; and
3. The issuing of Leaving Service Options and Leaver Statements within six months of a member leaving pensionable employment.

Scheme compliance levels are assessed on an ongoing basis through numerous engagements, including, training, communications and other forums. Quarterly Sectoral Focus Group meetings, chaired by DPER, afford RAs and Sectors an opportunity to present compliance status and provide a network of support for discussion on shared issues. The Single Scheme survey, issued annually (early January) gathers additional metrics from each Relevant Authority and provides a point in time view of compliance and member numbers.

This action plan sets out that all Relevant Authorities will have processes in place to calculate contributions and referable amounts, will issue Leaving Service Options/Leaver Statements in accordance with the legislative requirements and will have issued any backlog of Annual Benefit Statements to members while ensuring processes are in place to continue issuing Annual Benefit Statements in accordance with legislative provisions.

Calculation and Recording of Referable Amounts

“Referable Amounts” are the money amounts that members build up over time as a member of the Scheme. Every time that a member receives pensionable remuneration in a pay-period, they contribute to the Scheme and build up referable amounts towards their retirement lump sum and pension.

The calculation and recording of a member’s referable amounts is a key measure of compliance. All Relevant Authorities currently have the required data to enable the calculation of a member’s referable amounts meaning that the information for the payment of a member’s pension is available. However some RAs do not have automated systems or processes in place to calculate and report on a member’s referable amounts on a pay period basis. Referable Amounts are a core component of the Annual Benefit Statement, where they comprise an aggregate annual sum, for the purposes of indicating the value of a member’s pension benefits to end of the most recent year.

While the aggregate value of referable amounts is suitable for the Annual Benefit Statement, a detailed record on a pay-period to pay-period basis is required for the effective and compliant administration of the scheme where two pension accrual rates exist in the calculation of pension benefits, as is the case for the majority “standard accrual” membership cohort. In cases where members move pensionable employment within the Public Service or query their referable amount figures, at any point in time, Relevant Authorities are required to have a record of the pay period Referable Amounts accrued so that issues are promptly resolved.

Calculation of Referable Amounts (2017 – 2020)

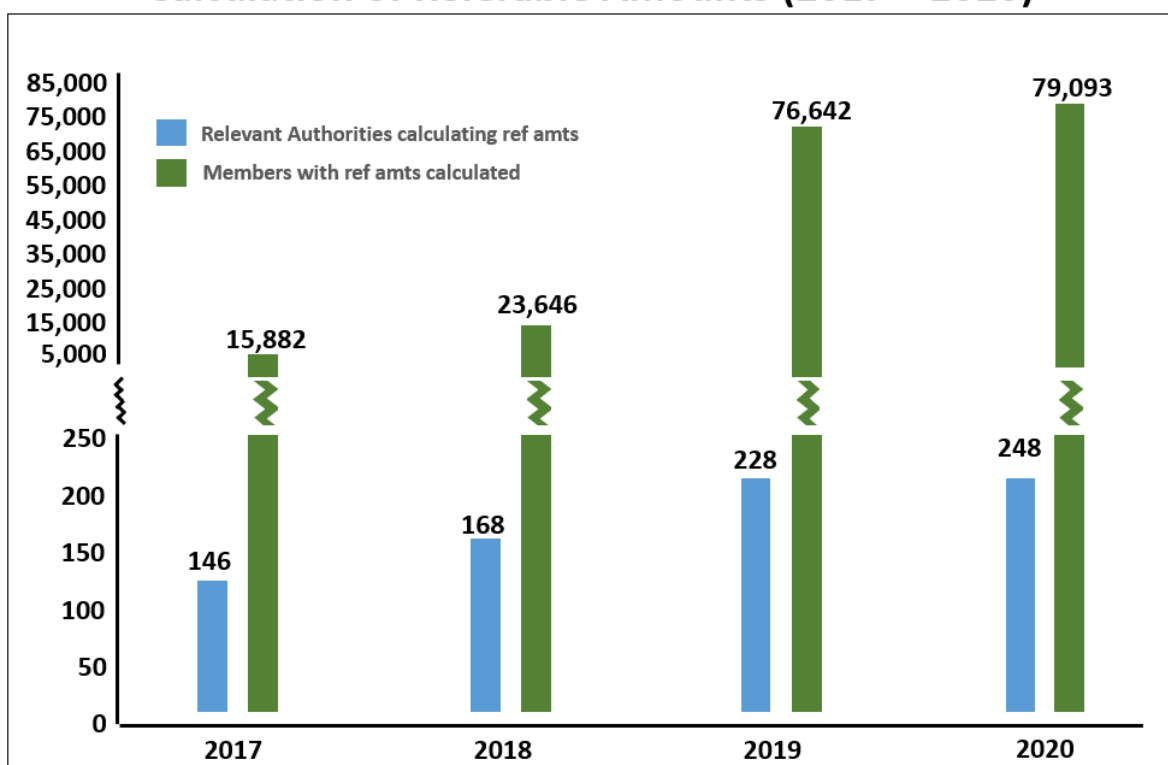


Chart 1: Calculation of Referable Amounts (2017 – 2020)

Chart 1 above outlines the responses of RAs and Sectors to the DPER Single Scheme Annual Survey of membership to end 2020. The survey sought confirmation from Relevant Authorities that they have an automated process in place to calculate and store referable amounts by pay period.

Results indicate a positive trend in compliance with growth to 248 Relevant Authorities or 84% of all RAs by year end 2020. This figure represents 79,093 members (circa 48% of scheme membership) for whom Referable Amounts were calculated via automated systems/processes in 2020.

As outlined earlier, although the data required to calculate Referable Amounts is held by the majority of Relevant Authorities, many do not have the automated systems or processes in

place to calculate Referable Amounts by pay period. Large Relevant Authorities in Sectors such as Education and Section 38 hospitals, which account for approximately 40% of members, need to put these systems/processes in place. It is a key objective of this Action Plan to monitor progress as Relevant Authorities work towards full compliance in this area.

Referable Amounts - Targets

The chart below sets out the target dates for all Relevant Authorities to have systems / processes in place to ensure that there is a capability to report on member’s pay period Referable Amounts on a pay period basis.

Sector		% Scheme Membership (@ 31/12/20)	Referable Amount Compliant	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4
Education (38%)	Department of Education Athlone	23%	▲		★						
	ETBs – Shared Service	6.8%	▲				★				
	ETBs – Dublin City		▲								★
	Institutes of Technology	1.5%	✓								
	Universities	6.6%	✓								
Health (38%) includes Section 38 RAs (16%)	HSE	23%	✓								
	Tusla	<1%	✓								
	S38 Bodies – SAP	4%	✓								
	S38 Bodies – Other	11%	▲				★				
Uniform (5%)	An Garda Síochána (incl. Civilians)	3%	✓								
	Defence Forces	2%	✓								
	Irish Prisons Service	<1%	✓								
Local Government (6%)	MyPay	2.5%	▲				★				
	Other Local Authorities	3.5%	▲				★				
	Dublin City Council		✘				★				
NSSO (9%) Active members only		9.5%	✓								
Independent Bodies (3%)		2.9%	▲				★				

<p>✓ Indicates that the RA/Sector have automated systems and processes in place to access and produce member’s referable amounts by pay period</p> <p>✘ Indicates that the RA/Sector does not have a system or process in place to access and produce member’s referable amounts by pay period.</p>	<p>▲ Indicates that some RAs have automated systems and processes in place to access and produce member’s referable amounts by pay period. These RAs /Sectors have manual processes in place to satisfy compliance.</p> <p>★ Indicates the target 2021 quarter for Referable Amount process compliance</p>
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Chart 2: Quarter Targets to meet legislative requirements for calculation and storage of Referable Amounts

Issuing of Leaver Statements

When a member ceases pensionable employment, it is a legal requirement that they are issued with Leaving Service Options outlining the value of their Scheme benefits to the last day of pensionable employment and associated options. As a secondary measure of compliance, the Department has begun to ascertain the number of Relevant Authorities issuing Leaver Statements to members within six months of cessation of pensionable

employment. Commencing with the 2020 annual survey, Relevant Authorities were asked to indicate if they issued Leaver Statements, within the statutory timelines, in the year under review.

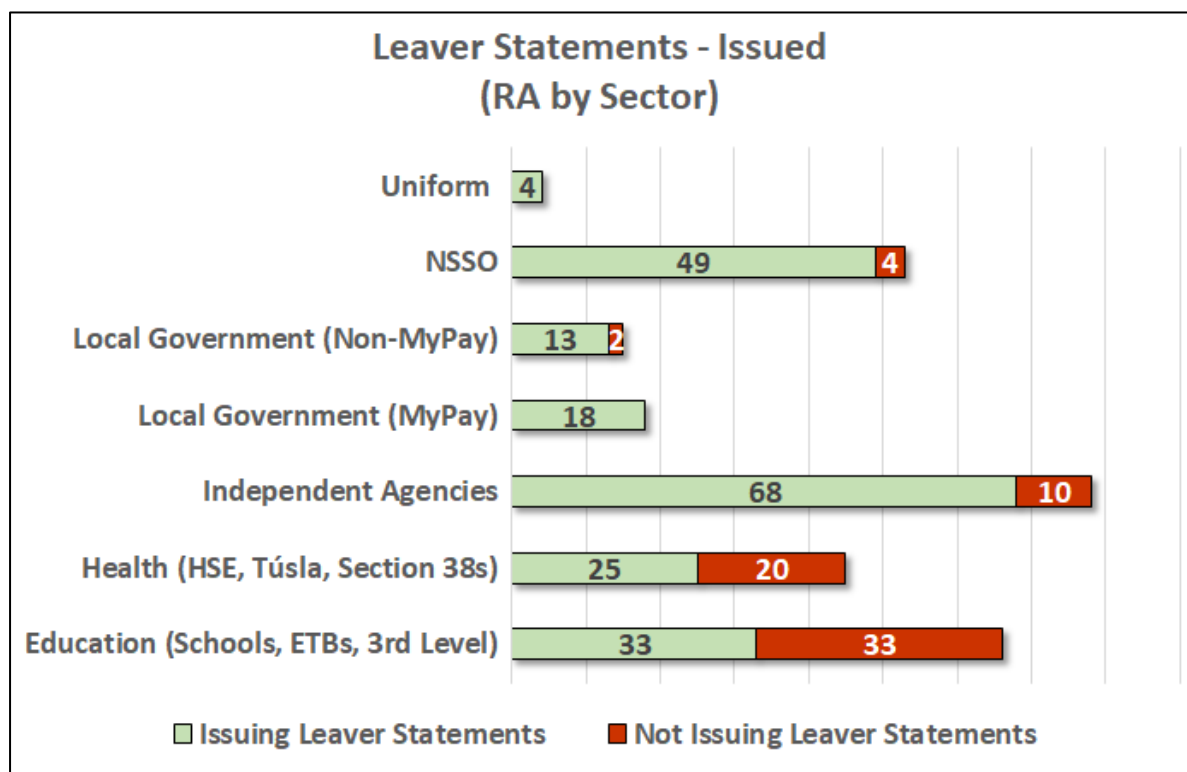


Chart 3: Bodies Issuing Leaver Statements in 2020 (figures from 2021 Annual Survey)

Chart 3 above illustrates the number of Relevant Authorities, grouped by sector that were issuing (green) and not issuing (red) Leaver Statements to their members in 2020. Generally, survey findings demonstrate positive management of the leaver process with a majority of Relevant Authorities in all sectors issuing Leaver Statements within the statutory timelines.

The survey indicated that many Relevant Authorities, such as the NSSO, are issuing Leaver Statements as matter of practice. Sectors such as Education have indicated that the focus will shift to issuing Leaver Statements once the practice of issue of Annual Benefit Statements has been established.

Leaver Statements – Targets

Section 43 (3) of the Single Scheme Act provides that Leaver Statements should be issued within six months of a member leaving employment. This chart sets out the target dates for all Relevant Authorities to have processes in place to ensure that leaver statements are issued in accordance with the legislative provisions.

Sector		% Scheme Membership (@ 31/12/20)	Currently Issuing Leaver Statements	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4
Education (38%)	Department of Education Athlone	23%	▲				★				
	ETBs – Shared Service	6.8%	▲				★				
	ETBs – Dublin City		▲								★
	Institutes of Technology	1.5%	✓								
	Universities	6.6%	▲				★				
Health (38%) includes Section 38 RAs (16%)	HSE	23%	✗					★			
	Tusla	<1%	✗					★			
	S38 Bodies – SAP	4%	✓								
	S38 Bodies – Other	11%	▲			★					
Uniform (5%)	An Garda Síochána (incl. Civilians)	3%	✓								
	Defence Forces	2%	✓								
	Irish Prisons Service	<1%	✓								
Local Government (6%)	MyPay	2.5%	✓								
	Other Local Authorities	3.5%	▲		★						
	Dublin City Council		✗				★				
NSSO (9%) Active members only		9.5%	✓								
Independent Bodies (3%)		2.9%	▲			★					

<p>✓ Indicates that the RA/Sector is currently issuing Leaver Statements to their members and fully compliant.</p> <p>✗ Indicates that the RA/Sector is not currently issuing Leaver Statements to their members.</p>	<p>▲ Indicates that some RAs within the Sector (Group) are issuing Leaver Statements. In some cases, these RA/Sectors have issued a Leaver Statement to members upon request and are developing a process/system to automate the practice.</p> <p>★ Indicates the target 2021 quarter for Full Leaver Statement compliance</p>
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Chart 4: Quarter Targets for meeting legislative requirements for issuing Leaver Statement by Sector

Issuing of Annual Benefit Statements

As set out in Section 43 (2) of the Public Service Pensions (Single Scheme and Other Provisions) Act 2012, Relevant Authorities are required to issue Annual Benefit Statements to their members no later than June 30th each year in respect of the previous year.

The Annual Benefit Statement sets out:

- Relevant personal information for the member
- The total amount of contributions paid / repaid by the Scheme member concerned in the previous year
- The total referable amounts accrued / restored by the Scheme member in the previous year
- The total referable amounts accrued by a member since membership of the Scheme commenced with the Relevant Authority issuing the statement.

The issuing of Annual Benefit Statements (ABS) is tracked through an annual survey undertaken by DPER, in which respondents indicate the years for which they have issued Annual Benefit Statements, in accordance with the Single Scheme legislation. For example, results from the survey conducted in Q1 2021 indicated the number of Relevant Authorities who have issued Annual Benefit Statements to their 2019 members, by 30th June 2020

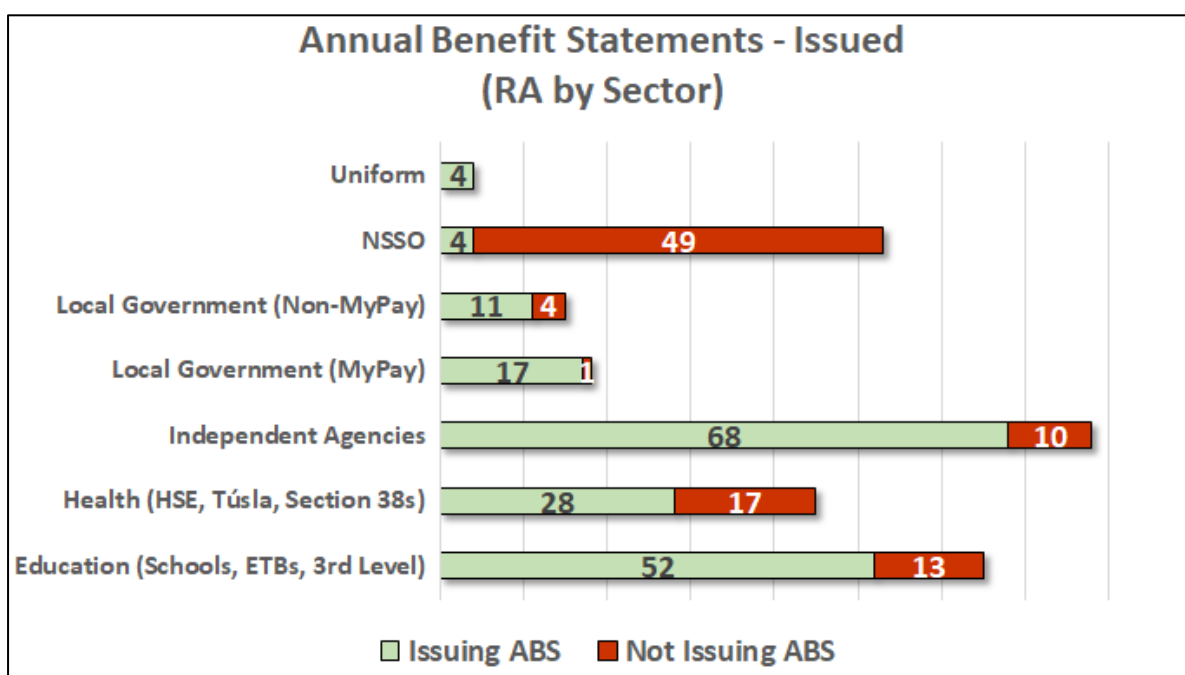


Chart 5: 2019 Annual Benefit Statements Issued (figures from 2021 Annual Survey)

Chart 5 above illustrates the number of Relevant Authorities, grouped by sector that were issuing (green) and not issuing (red) 2019 Annual Benefit Statements to their members in 2020.

The 2021 survey indicated that the NSSO are aggressively working through a backlog of Annual Benefit Statements to be issued to members and that the Education and Health sectors have made progress. There has been further growth in members receiving 2019 Annual Benefit Statements due to HSE, An Garda Síochána, Defence Forces and other large Relevant Authorities becoming compliant in this area.

This action plan sets out targets across all sectors in order to become compliant with Section 43 (2) of the Single Scheme Act (Chart 6 below).

Annual Benefit Statements (2017 – 2020)

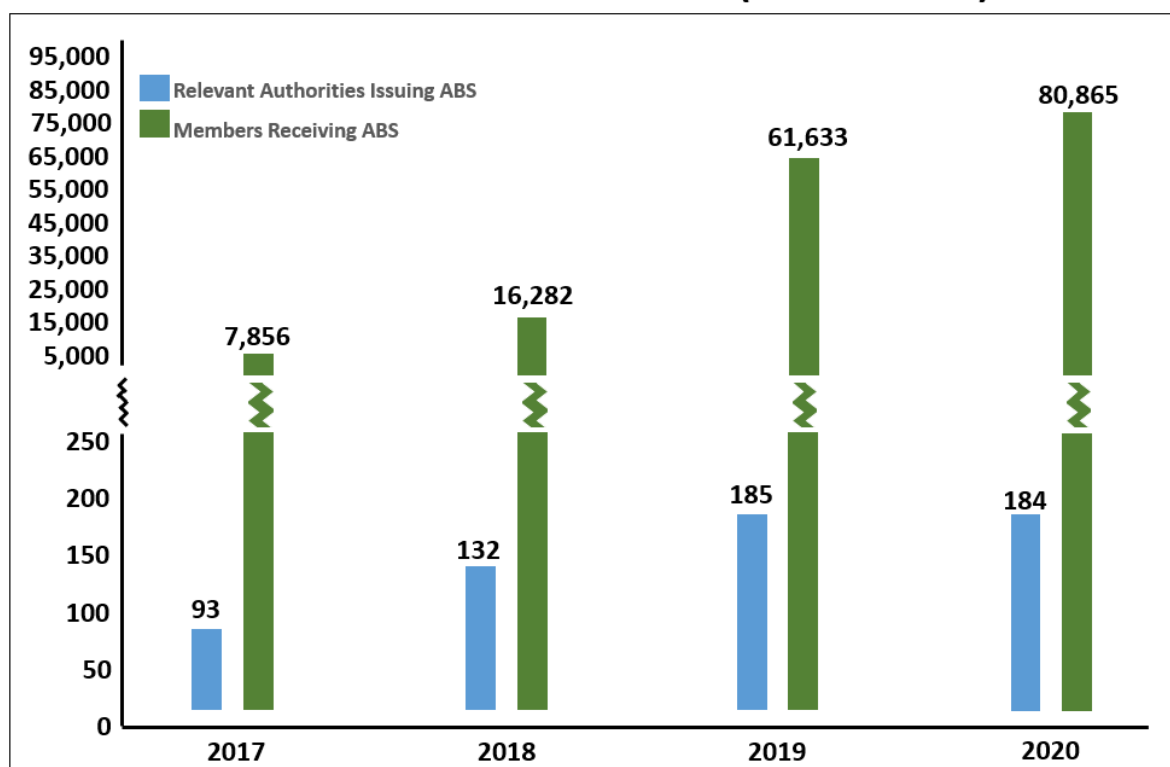


Chart 6: 2017 – 2020 Growth in RAs issuing and Members receiving ABS

Chart 6 above demonstrates progressive growth from 2017 to 2020 in the number of members receiving Annual Benefit Statements with 80,865 statements issued, representing 58% of active members that were eligible for statements in 2020.

Annual Benefit Statements – Targets

The following chart outlines the timelines for compliance by all Relevant Authorities. Achieving compliance ensures that Annual Benefit Statements have been issued to all members for the years 2013 – 2019. 2020 statements must be issued by the end of June 2021 and Relevant Authorities will remain compliant in subsequent years by issuing ABS in accordance with statutory guidelines.

Sector		% Scheme Membership (@ 31/12/20)	Currently Issuing ABS	2021 Q1	2021 Q2	2021 Q3	2021 Q4
Education (38%)	Department of Education Athlone	23%	✘		★		
	ETBs – Shared Service	6.8%	⚠				★
	ETBs – Dublin City		✓				
	Institutes of Technology	1.5%	⚠		★		
	Universities	6.6%	⚠				★
Health (38%) <i>includes Section 38 RAs (16%)</i>	HSE	23%	✓				
	Tusla	<1%	✓				
	S38 Bodies – SAP	4%	✓				
	S38 Bodies – Other	11%	⚠			★	
Uniform (5%)	An Garda Síochána (incl. Civilians)	3%	✓				
	Defence Forces	2%	✓				
	Irish Prisons Service	<1%	✓				
Local Government (6%)	MyPay	2.5%	✓				
	Other Local Authorities	3.5%	⚠		★		
	Dublin City Council		✘				★
NSSO (9%) Active members only		9.5%	⚠				★
Independent Bodies (3%)		2.9%	⚠			★	



Indicates that the RA/Sector is currently issuing Annual Benefit Statements to their members and fully compliant



Indicates that some RAs within the Sector (Group) are issuing Annual Benefit Statements



Indicates that the RA/Sector is not currently issuing Annual Benefit Statements to their members



Indicates the target 2021 quarter for Full Annual Benefit Statement compliance to include the backlog of statements from 2013-2019

Chart 7: Targets for Annual Benefit Statement Issue in 2021/2022 to all members

Actions – Compliance

A series of actions for Relevant Authorities are outlined in the register below. These actions set out the specific tasks that each RA/Sector will undertake to work towards full compliance.

ID	Owner	Departmental Commitment	For Action By:	Action Area	Target
01	Department of Health	<p>Complete system development and support with HSE SAP Centre of Excellence (local SAP systems experts) to enable automated processes for referable amount generation and storage.</p> <ul style="list-style-type: none"> • Develop processes for the generation and validation of referable amounts by Q1 2021 • Train resource and commence validation of referable amounts for non-SAP payroll areas by Q1 2021 • Enhance system and put in place supports/resources for the generation of referable amounts in SAP payroll areas by Q2 2021 	HSE	Compliance – Referable Amounts	Q2 2021
02	Department of Health	<p>Complete system development with HSE SAP Centre of Excellence (local SAP systems experts) to enable production of leaver statements.</p> <ul style="list-style-type: none"> • Processes and supports/resources for data generation in place by Q2 2021 • System development to enable the inclusion of refund data by Q4 2021 • Leaver Statement generation systems/processes/resources in place by Q1 2022 	HSE	Compliance – Leaver Statements	Q1 2022
03	Department of Housing, Local Government and Heritage	<p>Local Authorities outside MyPay, working with LGMA, will:</p> <ul style="list-style-type: none"> • Develop and rollout processes to issue statements by Q2 2021 	Local Authorities - LGMA (Not in MyPay)	Compliance – Annual Benefit Statements & Leaver Statements	Q2 2021
04	Department of Housing, Local Government and Heritage	<p>Local Authorities (not in MyPay) to develop core software that enable automation in the generation and storage of referable amounts. Milestones have been indicated as:</p> <ul style="list-style-type: none"> • Test and implementation by Q2 2021 • Automated processes in place by Q4 2021. 	Local Authorities - LGMA (Not in MyPay)	Compliance – Referable Amounts	Q4 2021

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ID	Owner	Departmental Commitment	For Action By:	Action Area	Target
05	Department of Housing, Local Government and Heritage	MyPay to work to produce the correct pay period calculations based on payroll data. Internal resources have been committed to this project and MyPay are targeting Q4 2021 for all their Local Authority clients	Local Authorities - MyPay	Compliance – Referable Amounts	Q4 2021
06	Department of Housing, Local Government and Heritage	DCC to develop processes and systems to ensure that the referable amount calculations and scheme contributions are accurate. DCC's milestones have been outlined as: <ul style="list-style-type: none"> • System development Q2 2021 • System validation Q3 2021 • Implementation and issuing of statement Q4 2021 	Local Authorities - LGMA Dublin City Council	Compliance – Referable Amounts. Leaver Statements & Annual Benefit Statements	Q4 2021
07	Department of Public Expenditure & Reform	NSSO to implement a manual process to ensure the backlog of annual benefit statements are issued by Q2 2021. <ul style="list-style-type: none"> • Test, validation and issue statements Q2 2021 	NSSO	Compliance – Annual Benefit Statements	Q2 2021
08	Department of Public Expenditure & Reform	A project is underway whereby a system will be implemented to automate the process of annual benefit statement generation. NSSOs milestones have been indicated as: <ul style="list-style-type: none"> • Development of processes to be complete by Q3 2021, • Validation and delivery by Q4 2021. 	NSSO	Compliance – Annual Benefit Statements	Q4 2021
09	Department of Education	DES will progress the remediation work on the payroll system for members in schools and ETBs. Work required involves testing and deployment of changes to calculations in payroll software in order to achieve ABS and Leaver Statement statutory timelines. Key Milestones have been set by the Department as: <ul style="list-style-type: none"> • Athlone Payroll testing - completed by end Q1 2021 • Remediation work - completed by mid May 2021. • ABS statements – issued by end of June 2021 	Department of Education	Compliance – Annual Benefit Statements	Q2 2021
10	Department of Education	Additional development in payroll systems to ensure that the statements are issued within six months of the scheme members last day of work. <ul style="list-style-type: none"> • Athlone Payroll testing - completed by end Q3 2021 • Leaver Statement process in place – Q4 2021 	Department of Education	Compliance – Leaver Statements	Q4 2021

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ID	Owner	Departmental Commitment	For Action By:	Action Area	Target
11	Department of Education	Currently using manual processes. City of Dublin ETB to migrate to ETB Shared Services in Q4 2021, will result in automated processes by target date.	Department of Education / ETB – City of Dublin	Compliance – Referable Amounts	Q4 2022
12	Department of Further and Higher Education, Research, Innovation and Science	Institutes of Technology will work with software providers on the development of fixes to pensions calculations. <ul style="list-style-type: none"> Fixes in place by Q4 2021. 	Institutes of Technology	Compliance – Annual Benefit Statements & Leaver Statements	Q4 2021
13	Department of Further and Higher Education, Research, Innovation and Science	A small number of outstanding universities are working towards compliance by end 2021.	Universities	Compliance – Annual Benefit Statements & Leaver Statements	Q4 2021

Table 1: Compliance – RA/Sector Actions

4. Securing Member Data – Databank

The design, build and deployment of the Single Scheme Databank is an interim risk mitigation measure intended to secure all summary information for Single Scheme members since the inception of the Single Scheme in 2013. Management of the Databank is intended to achieve the following important objectives:

- Safeguard against loss of Single Scheme member data from 2013
- Ensure data is maintained to a common data standard by all RAs

Single Scheme Databank – Onboarding

Work is currently underway to onboard Relevant Authorities to the Single Scheme Databank, in groups, and to complete a catch-up exercise whereby RAs upload the data files for the years 2013-2019 inclusive. As of the end of November 2020, 86 of RAs (32%) and approximately 25,000 Members (18%) have been onboarded to the Databank. Once the catch-up exercise is complete, with all RAs onboarded, it is expected that the yearly data file upload will coincide with the issuing of the Annual Benefit Statements to members.

The Databank on-boarding schedule is based on Relevant Authority 'readiness', as assessed on the basis of latest Annual Survey returns (year end 2020). To be considered ready for on-boarding, an RA must have issued Annual Benefit Statements to their members for the years 2013 – 2018 inclusive. The onboarding is staged in 13 waves. The initial waves focused on Standalone RAs and Shared Services with later waves dedicated to the HSE and Education sectors.

Quality Assurance measures are applied with a future intention of conducting QA testing in tandem with file submission to facilitate timely amendments, should this be required.

The timelines for onboarding Relevant Authorities are set out in Chart 8 below. Upon completion of onboarding all RA member and benefit data, the primary goal will be achieved - securing all required member data since the beginning of the scheme. The onboarding targets as set out in Chart 8 are supported by a number of actions for RAs/Sectors, listed in the table below.

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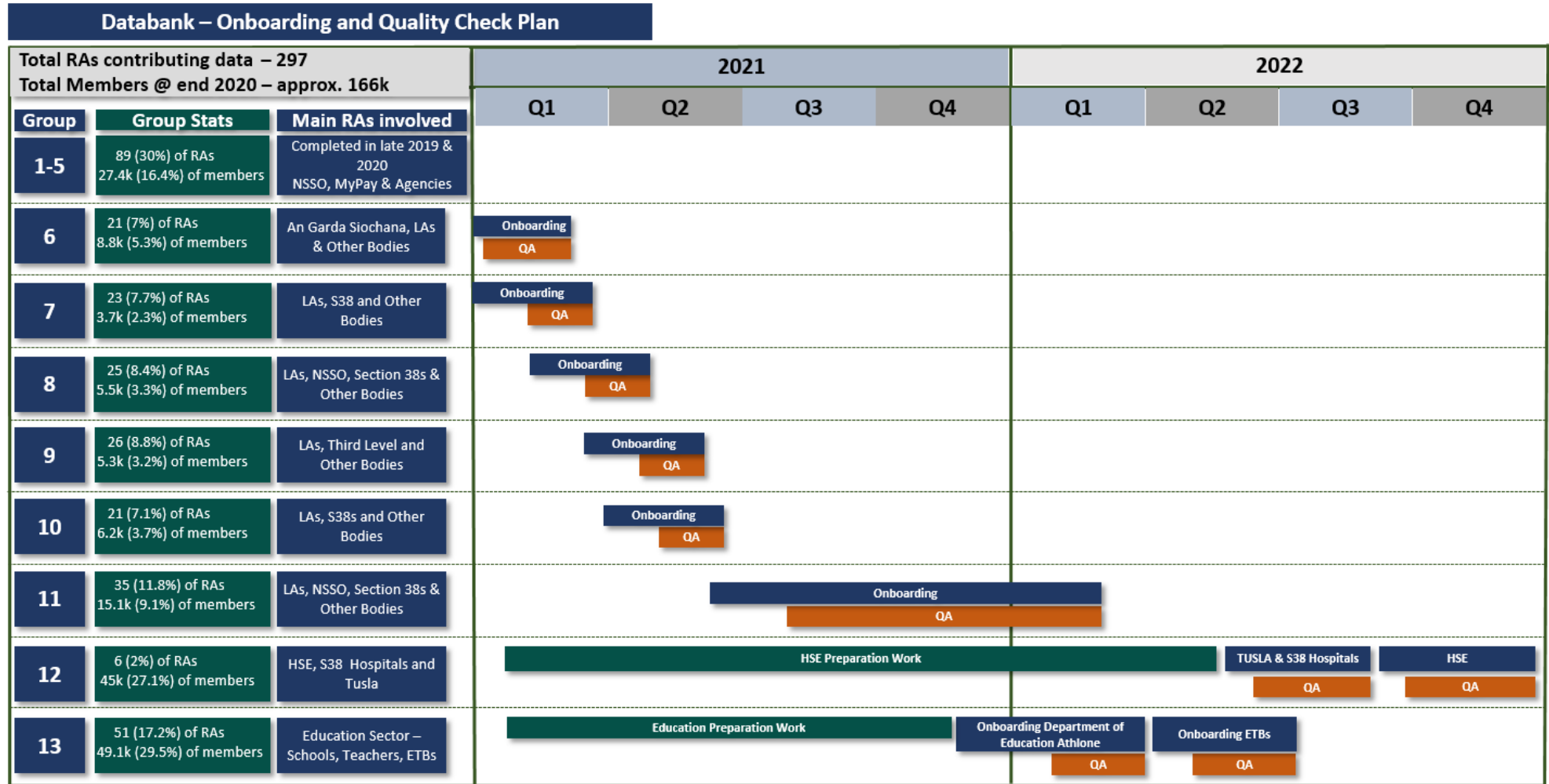


Chart 8: Databank Onboarding Schedule

Actions – Databank

A series of actions for Relevant Authorities are outlined in the register below.

ID	Owner	Departmental Commitment	For Action By:	Target
14	Department of Housing, Local Government and Heritage	Local Authorities will ensure that they meet the onboarding timelines as set out in their Databank onboarding plans. <ul style="list-style-type: none"> LGMA to hold monthly meetings to review progress to ensure compliance with timelines and report into monthly Sectoral Focus Group meetings Data to be uploaded to the Databank by Q4 2020. 	Local Authorities - LGMA (Not in MyPay including DCC)	Q4 2022
15	Department of Housing, Local Government and Heritage	DCC to develop processes and systems to allow them upload required member data to the Databank by Q4 2021. <ul style="list-style-type: none"> System development and validation Q3 2021 Implementation and data upload Q4 2021 	Local Authorities – LGMA – Dublin City Council	Q4 2021
16	Department of Housing, Local Government and Heritage	MyPay to meet planned timeline to upload all data to the Single Scheme Databank for the 20 sites live in MyPay Superannuation prior to October 2021.	Local Authorities - MyPay	Q3 2021
17	Department of Education	DES will ensure that required member data is uploaded to the Databank as per onboarding schedule. Tasks include: <ul style="list-style-type: none"> Planning phase for testing, implementation and data transfer to the Databank. – Q1 2021 Preparation of DES data in Q2 & Q3 – complete by end Q3 2021. Transfer of SPS Data to Databank – commencing by the end Q4 2021. ETB's – Transfer of SPS Data to Databank – commencing by the end Q2 2022. 	Department of Education	Q2 2022
18	Department of Public Expenditure & Reform	The NSSO will complete process and systems development to deliver a solution for managing their Databank returns. <ul style="list-style-type: none"> Test and implementation by Q2 2021 Development of processes and systems for Databank upload in place by Q4 2021. 	NSSO	Q4 2021
19	Department of Health	Complete system development with HSE SAP Centre of Excellence (local SAP systems experts) to enable systems to upload required data to the Databank by Q4 2022. <ul style="list-style-type: none"> Systems and processes for data generation/management in place by Q1 2022 System development to identify and extract data in place by Q3 2022 Data quality review and system updates/enhancements completed by Q3 2022 File testing with DPER and commence loading data by Q4 2022 	HSE	Q4 2022
D01	DPER	Perform data quality checks to data uploaded by Relevant Authorities. Engage with RAs to indicate where issues have been identified to ensure that quality data is uploaded.	DPER	ongoing

Table 2: Databank – RA/Sector Actions

5. Training, Policy Guidance & Engagement

DPER has been providing training and central support to Relevant Authorities since 2017. This has been delivered through administrator training, provision of a website containing support materials for administrators and members of the scheme, a Helpdesk for dealing with administrator queries and quarterly communications issued by way of a Project Bulletin to Relevant Authority contacts. DPER activities cover the following areas:

- Single Scheme “Lifecycle” process training sessions for administrators (classroom, online and training videos);
- Input to Policy Development and Guidance; and
- Development and updating of detailed information resources to support members and administrators (including Member handbooks, At A Glance Guides, Process maps and guidelines, calculation tools)

Training

As the Single Scheme continues to grow in member numbers, demands placed on administrators of the scheme at Relevant Authority level will also increase. DPER have set out a curriculum of training comprising six separate training modules that specifically address administrator needs and allows for dedicated time with experienced tutors to work through process specific tools and templates. There has been a steady rate of growth in the uptake of this training by administrators across all sectors. A core component of each training module is dedicated to making administrators aware of the supports that are available to them through the Single Scheme website and Helpdesk. Tutors also encourage administrators to direct members to the website for answers to common queries. Table 1 below represents the training provided from 2017 to the end of 2019 through classroom-based training.

Total Training Modules Provided	87
Total Number of Attendees	1,437
Total RAs Represented	235

Table 3: Training Delivered – Classroom based

Training Delivery and Reach – Q3 2017 to Q4 2019

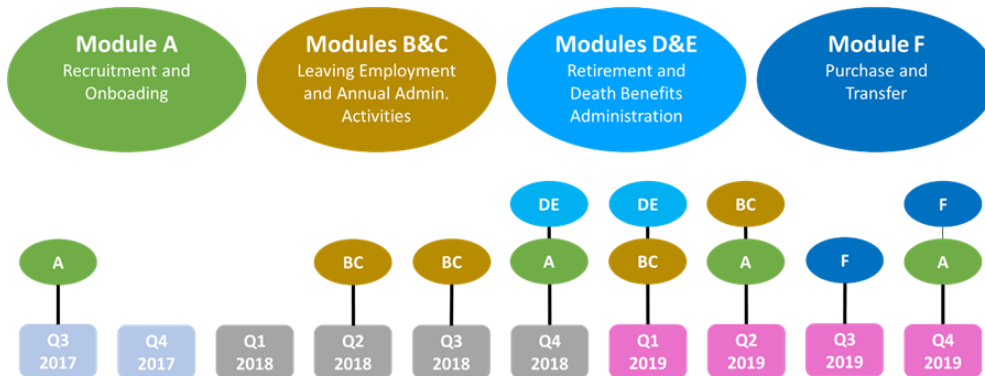


Figure 3: Training Delivery by Subject Matter Area (2017 – 2019)

The programme of training for the remainder of 2020 commenced in October, online. Due to the Covid 19 pandemic, it was not possible to deliver classroom-based training from March 2020 and as such the focus of the DPER team was finding alternate ways to deliver training. Six training videos were subsequently released on the Single Scheme website, during Q3 2020, with over 400 views in this same year. In addition to the training videos, the classroom-based offering was revised for webinar delivery, with the previous half and full-day training material repurposed into succinct 90-minute sessions. Going forward DPER will offer training supports in the form of online videos, webinars and when conditions allow, a return to classroom led training in 2021.

Training Delivery 2020(Webinars)

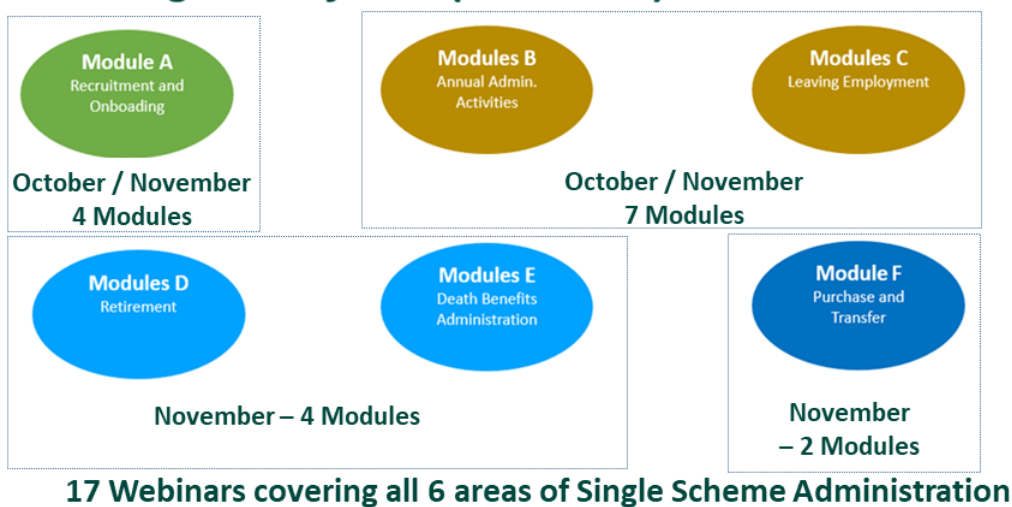


Figure 4: Training Delivery 2020

Policy Development and Guidance

Over the lifetime of this Action Plan, DPER will continue to develop policies and ensure that associated supports (handbooks etc.) are developed and published on the Single Scheme website. This will ensure that administrators in the RAs have tools available to them to assist in administering the scheme correctly. DPER will continue to use sectoral contacts and networks established over the last number of years to garner views on administrative overheads and the impact of suggested policy enhancements. There are a number of policy enhancements planned and these are outlined as actions for DPER below.

Engagement

Single Scheme Website

The DPER Project Team provides a dedicated Single Scheme website for Members and Administrators. The site went live in 2017 with the number of users accessing the site on a daily basis running at an average of 158 in 2020. The website provides resources for both members and administrators, containing guidance on how to administer the scheme (calculators, templates, process maps, handbooks and training videos) and information for members about the scheme (estimators, membership booklets).

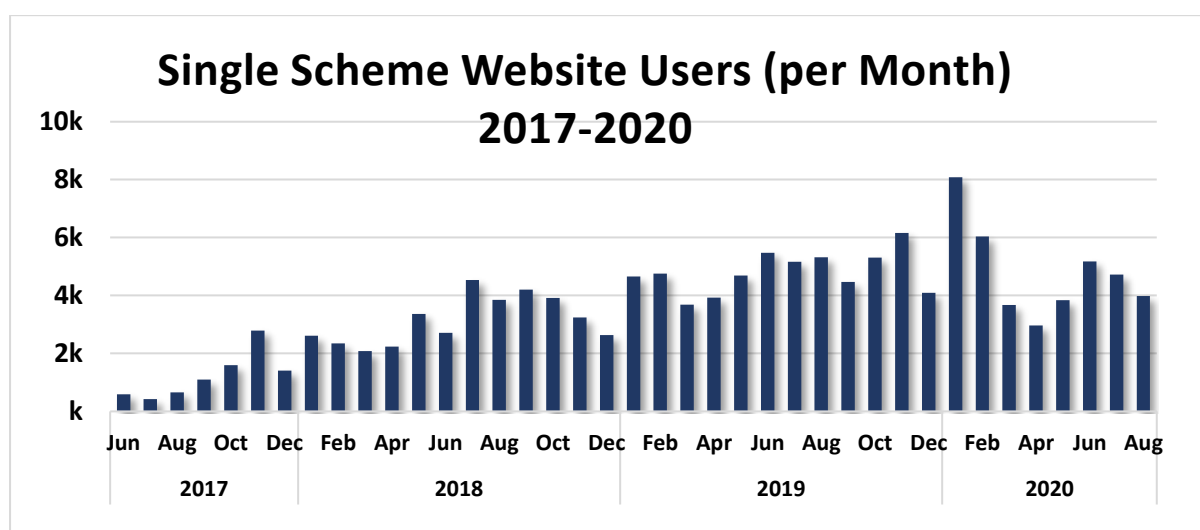


Chart 9: Single Scheme website – Activity (2017 – 2020)

Helpdesk

To support RAs in the administration of the Single Scheme, DPER established a dedicated Helpdesk for administrator queries in early 2018. During 2020, the Helpdesk received over 1,700 requests for assistance. The average resolution rate for administrator queries is just under two days. As part of the new reporting regimen for monthly sectoral meetings, DPER will report on a set of KPIs to stakeholders that measure query turn-around times and

performance. In addition, DPER will reach out to Helpdesk users in 2021 to gauge their experience of the Helpdesk and seek out recommendations for improvements.

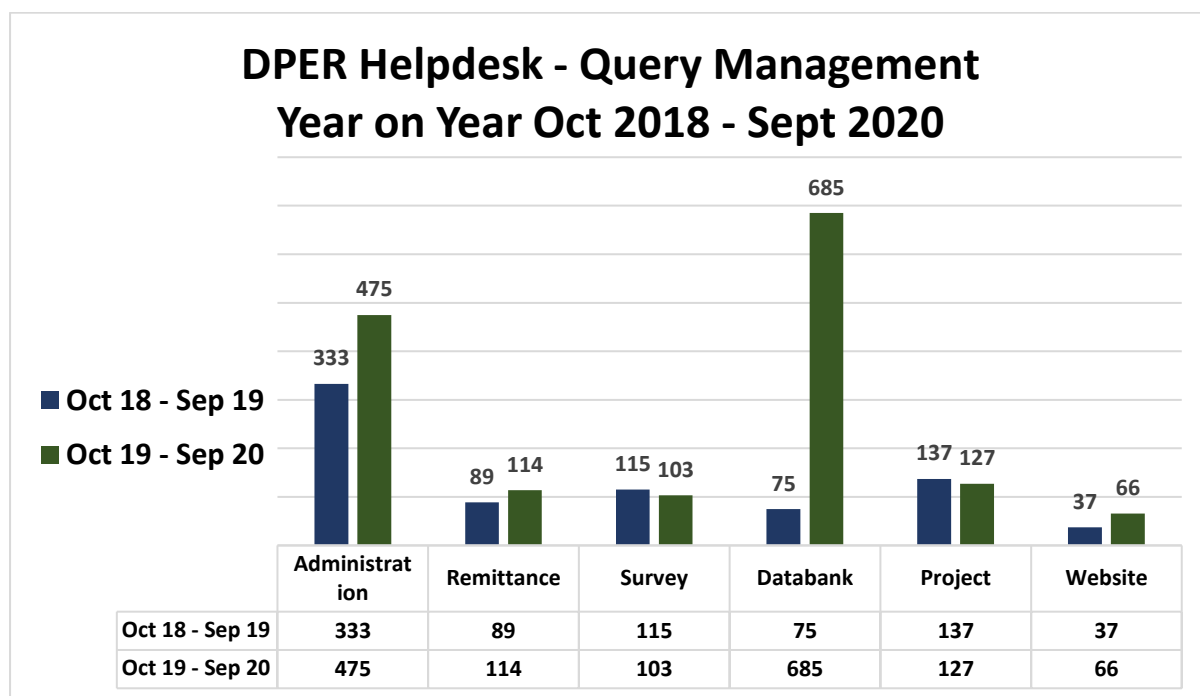


Chart 10: Single Scheme Helpdesk – Query Management – Year on Year

Quarterly Communications

DPER issues a quarterly bulletin to pension administrators that highlights developments around all aspect of the Single Scheme. DPER will continue to use this Bulletin to promote its new online video offerings and encourage administrators to register their interest for training while also including any relevant information about developments in the Single Scheme.

DPER actions for the single scheme website, helpdesk and quarterly communications are set out in the Register below.

Actions – Training, Engagement & Policy Guidance

A series of actions for DPER are outlined in the register below. These actions set out the specific tasks that that will be undertaken in 2021/2022.

ID	Action Area	Tasks to Achieve Action	Target
D02	Training	Continued delivery of existing training supports: <ul style="list-style-type: none"> • Six webinar modules based on expressions of interest from RAs. • Production of additional training videos for Administrators as well as Member information videos 	Q1 2021 / ongoing
D03	Training	Return to classroom based training as public health guidelines permit in 2021.	Q3/4 2021
D04	Training	Achieve QQI accreditation for Single Scheme training. Administrators who successfully complete training to receive certification aligned with the National Framework of Qualifications. <ul style="list-style-type: none"> • Requirements Definition – Q2 2021 • Identification of Educational Partner (Procurement) – Q4 2021 • Curriculum Development and Attainment of QQI Standard– Q2 2022 	Q2 2022
D05	Policy Guidance	Prepare and publish detailed policy guidance for State Pension Age and will develop new regulations as required <ul style="list-style-type: none"> • Engage with stakeholders – Q1/Q2 2021 • Prepare Regulations – Q3 2021 • Publish detailed policy guidance – Q4 2021 	Q4 2021
D06	Policy Guidance	Drafting of regulations regarding the treatment of Social Welfare Benefits in the accrual of Single Scheme Benefits to be published in 2021. Detailed guidance will accompany the Regulations in the form of a circular. <ul style="list-style-type: none"> • Stakeholder engagement & prepare draft Regulations – Q3 2021 • Publish detailed guidance in the form of a circular – Q4 2021 	Q4 2021
D07	Policy Guidance	Engage with stakeholders across the Division and Sectors to review pension appeals mechanisms for the Single Scheme. <ul style="list-style-type: none"> • Options documented – Q4 2021 	Q4 2021
D08	Website, Helpdesk and Quarterly Comms.	Scope, drive and advance planning work for options to consolidate existing DPER public service pension websites (i.e. currently www.cspensions.gov.ie) and www.singlepensionscheme.gov.ie to (1) better resource public pension administrators with knowledge and information and, (2) ensure members of public service pension schemes have access to information, support and guidance. Updates on progress to form part of Sectoral Focus Group and Pensions Network agendas. <ul style="list-style-type: none"> • Scoping and planning – Q2/Q3 2021 • Requirements documented and planning with OCGIO for website design – Q4 2021 • Build, Test and Deploy website – Q2 2022 	Q2 2022

Table 4: Training, Policy Guidance & Engagement

