

Mail house Transition

Steering Committee update

14th March 2025

Prepared by: [Out of scope]

Steering Committee Members

[Out of scope] (sponsor)

[Out of scope] (business owner)

[Out of scope]

[Out of scope]

[Out of scope]

[Out of scope]



He Kaupare. He Manaaki. He Whakaora.
Prevention. Care. Recovery.

Contents

1. Project overview
2. Progress update
3. Risk assessment
4. Delivery Approach
5. Budget and funding

RELEASED UNDER THE
OFFICIAL INFORMATION ACT

Project overview

Why

- ACC has sourced mail house services from NZ Post (DATAM) since 2010 and Western Mailing since 2015. Neither contract has had rights of extension available for several years. Therefore in 2024, ACC returned to market to reassess supply options and assure value. Through this process, the successful supplier was Marketing Impact.
- **The purpose of this project is to implement the outcome of the mail house services procurement process, consolidating all mail house services under one contract with Marketing Impact.**
- Mail house services include:
 - Composing formatted correspondence including letters and invoices,
 - Printing and posting in envelopes or emailing correspondence,
 - Providing documentation back to ACC for upload to systems,
 - Management of GNA (Gone no address) letters returned to ACC,
 - Cleansing of postal addresses

The objectives of this project are to:

- Migrate all mail house services to Marketing Impact,
 - Set up all jobs including their documentation in an efficient and future proof manner
 - Move GNA management from Western Mailing
 - Implement quick win/value add changes where appropriate
- Support the business to maintain and then facilitate closing the relationships with Datam and Western Mailing.



Progress update

- The project is currently in the solution design and transition planning stage.

Solution design

- The project team is working through a significant amount of detail with Marketing Impact which is required in order for them to do their solution design.
- The system architect and project manager are in discussions with testing and with several different ARTs to understand and plan the work required from them.
- Where capacity allows, the lead BA is commencing documentation of the detailed business requirements for each job.

Transition planning

- The delivery approach will be to release the fifteen jobs in six to seven tranches starting in July 2025. An overview of the delivery approach is on slide 5.
- The critical path and timeline for delivery will be driven by ACC rather than Marketing Impact. We are working through the timeline, which will be dependant on:
 - Capacity in the Business Levy Product & Systems team for documenting requirements, completing proofing and early life support .
 - Capacity in the different ARTs and the impact of their other priorities (eg Guidewire to Cloud).
 - Marketing Impact availability and expectations
 - Balancing the risk of customer impacts/ errors against getting the project completed.
- As the solution and delivery requirements become clear, we are reviewing and updating the expected project costs (see slide 8)

Delivery risks

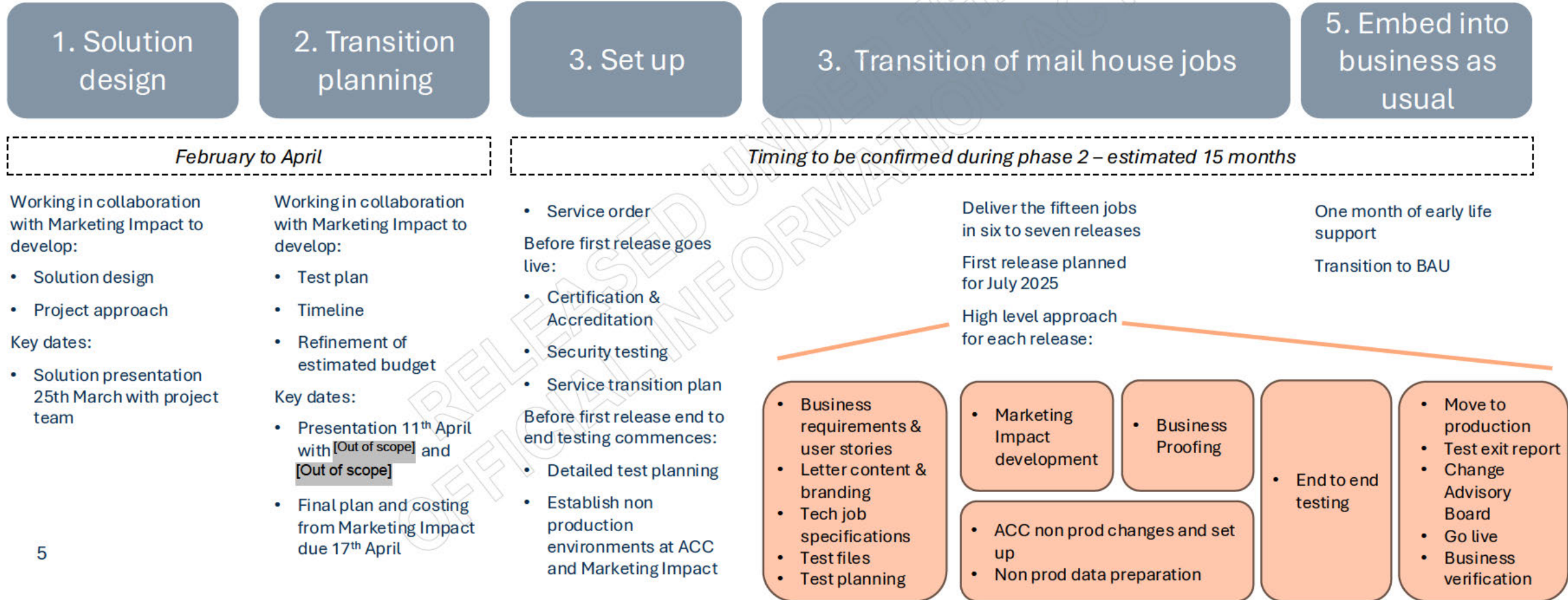
- A risk workshop has been held to identify delivery risks and these have been documented in a project risk register. Risk ratings and mitigation plans are still under development. The following groups of risks are worth highlighting:
 - Risk to timeline relating to dependencies on tech teams and the vendor, (key risks itemised on p6). Guidewire is the key risk area due to lack of a non production environment and the impact of the Guidewire to Cloud project.
 - Risks relating to the level of current documentation and mail house experience at ACC and the potential reputational risk if we make errors (see key risks on p7).
 - Privacy risk – Marketing Impact require production files with personal information for developing their jobs and this requirement has been reinforced by [Out of scope] [REDACTED]. I am working through a privacy risk assessment for this as ACC would not normally provide PI outside of a production environment.

Next steps

- Marketing Impact will present their solution on 25th March and the transition plan and costings are due to be completed and agreed with ACC by 17 April.
- ACC's ability to commit to a timeline will impact Marketing Impact's ability a transition plan by 17th April.



High level delivery approach



Delivery risks:

Key risks to timeline and cost relating to dependencies on tech teams and the vendor

Project Risk ref	Risk	Comments/ Current status
R21	Guidewire non production Currently the Guidewire non production integration with Axway was been decommissioned. If we can not stand up a new non production environment or find an alternative approach, we would have to release the Guidewire jobs without end to end testing which runs the risk of incorrect data being sent, pdfs not being updated correctly in Guidewire. This could impact customer service, invoicing accuracy	This one is an issue not a risk. The test manager, system architect and key tech partners are working through options for this, considering the risks and costs associated,
R18	Guidewire and EOS Cloud migration If major IT projects like EOS and Guidewire migrations conflict with our project timelines this could result in additional testing and/or delays to the project	We are in discussions with the Guidewire Product owner on this risk and it remains a concern as Guidewire is involved in all but one of our planned releases. No issues have been identified with the EOS to Cloud migration. The EOS jobs will be migrated in September 2025.
R14	Source system changes If we find that we need to make changes in source systems (EOS, Guidewire, Te Kahu, MyA4B, MFP), then we will need to get development resource prioritised and this will result in delays to delivery of the project and increase in costs	The project planning assumes no changes are required in the source systems. The system architect is talking with each tech team to confirm this. However this will remain a risk until the detailed work around each job is completed during project delivery.
R2	Marketing Impact underestimating cost and effort If Marketing impact did not understand the complexity of the work when they put forward their response in the procurement process, then they may have underestimated the amount of work for them, which may result in higher than expected costs, increased timelines, or MI being unwilling or unable to complete the work to the level we need.	Marketing Impact have indicated that the work is more complex than they originally thought. We have requested that where there are options for delivery that these are presented so that ACC can make decisions according to our priorities. Procurement did include a significant contingency in the initial estimates provided to the project. At this stage we do not expect an impact on timeline, based on feedback from Marketing Impact.

- You can see the full project risk register [here](#)

Risks continued over page...



Delivery risks (continued)

Key risks relating to the level of current knowledge and limited of mail house experience at ACC resulting in reputational risk if errors are made in invoices, reports and letters in production

Project Risk ref	Risk	Comments/ Current status
R4	Lack of knowledge of current state Because we do not have accurate current state documentation and incumbent mail houses may have implemented rules that we are not aware/ differently from expectations, we might miss requirements resulting in increased time during proofing/ delays in the project and the potential for errors in the communications released	We would like to get information from incumbent suppliers on what their current rules are. However this has not yet been actioned and is dependant on discussions about our transition approach. We will be doing comprehensive proofing and testing and post go live proofing to pick up and manage any missed requirements.
R12	Key person risk If the key subject matter expert for the project does not have sufficient capacity or is no longer available for the project, then the project might be unable to prepare requirements and respond to questions from Marketing Impact, resulting in delays to delivery, increased costs and errors in deliverables	The project is placing heavy reliance on a single subject matter expert/ BA from Business Levy Products and Systems. This is driving the timeline. [Out of scope] and [Out of scope] are working to ensure that we have support from the wider team. However, this will remain a risk through the project.
R1	Pressure to go faster If pressure is put on the project to go too fast, we may not have sufficient time to ensure all requirements and testing is thorough and this could result in us releasing communications with errors- breaching leg, customer comms errors, privacy breaches, financial impact	This is a key concern for the Levy Products and Systems BAs on the project and reflects other risks relating to experience and capacity in the team (see detail in risk register). Careful management of capacity and issues arising will be essential to mitigate this risk.
HR10	Invoice errors If we rush the transition of invoices, we might make errors which will result in incorrect invoices being produced with significant impacts on customers and financial impact on ACC.	The invoice jobs are being scheduled for the end of the project so we can build experience and refine our approach. We propose to release each invoice job on its own so that the team can focus on it, and scheduling them at least one month apart to allow for post go live management of any errors.
R16	eInvoicing If we can not get an exception to providing e-invoicing by 1 Jan 2026, we will have to move the invoicing jobs to the beginning of the project and we will also need to get work completed by NTK for the solution design and implementation. There is a risk that we will not be able to be compliant with the deadline due to the complexity of the work This also means that we will not have the opportunity to do the easy jobs first to iron out small kinks and allow MI to get used to how we work. We could also get delays based on black out periods and cloud migrations. This will increase the risk of errors and likely significantly delay the whole project.	This has been discussed with [Out of scope] The plan is to request an exemption from the Minister given the work we have under way that may provide alternative methods to delivering similar outcomes to business.

- You can see the full project risk register [here](#)



Budget and Funding

- The project will be funded out of Revenue Operations operational budget.
- The operational budget for Mail house Services comes from:
 - Enterprise Procurement (920) for correspondence sent to ACC claimants, clients and Providers for Service Operations Administration; and
 - Revenue Operations (0873 for correspondence relating to levies and invoicing.
- High level project costings have been created based on information gathered during the procurement process and discussed with [Out of scope] .

Detailed cost estimates

- We are now moving into detailed planning and this will enable more accurate cost estimates.
 - We have identified that the initial costings did not include test resources, this is being scoped and will increase the cost.
 - Indications from Marketing Impact are that the project is more complex than they expected, however the initial cost estimate did add a generous contingency for that.
 - NTK has indicated that they will not cross charge for their work. However, there is a requirement to stand up a new Guidewire non prod environment and this will need to be funded
 - The length of time the project takes will impact the total costs because of dedicated project management, BA and tester costs .
- Once the delivery of the project commences we will start tracking our costs.

Mailhouse Transition Project

Steering Committee Meeting

6th May 2025, 3.30pm

Justice Centre 12.02 or Teams Meeting

Prepared by [Out of scope], Project Manager

Steering Committee Members

[Out of scope] (Senior Responsible Owner)

[Out of scope] (Business Owner)

[Out of scope]

[Out of scope]

[Out of scope]

[Out of scope]

[Out of scope]



He Kaupare. He Manaaki. He Whakaora.
Prevention. Care. Recovery.

Agenda

1. Project scope and timeline
2. Project cost management
3. Governance and endorsement of Steering Committee Terms of Reference
4. Key risks

Project scope and timeline

- The purpose of this project is to implement the outcome of the mail house services procurement process, consolidating all mail house services under one contract with Marketing Impact.
- The Marketing Impact transition plan is complete and the Service Order with Marketing Impact is in the process of being finalised. The ACC project plan is complete and endorsed by the business owner.
- Milestones have been agreed with Marketing Impact, but as details of deliverables are not confirmed, these dates are agreed to be targets which will be managed by the Marketing Impact and ACC project managers, rather than hard dates.
- Work on the first release has commenced.

No.	In scope	Out of scope
1	Transition 15 mail house jobs and Gone No address management from Western mailing/ NZ Post Datam to Marketing Impact	Delivery of e-invoicing for levy invoices
2	Updates to transfer jobs at ACC to new provider, with full end to end testing from source system to Marketing Impact	Changes to data files created by core systems
3	Rebranding of all comms to current brand standards, including updating some letters in EOS	New Axway transfers
4	Deliver quick win improvements to email experience and LPS processes	BAU management of mail house activity
5	Facilitate closing the relationships with Datam and Western Mailing	

Milestone	Target Date
Project start-up/ initiate phase start	Complete
Deliver phase start	28 April 2025
Release one live – GNA management & two mailhouse jobs	1 Sept 2025
Release two – three mailhouse jobs	24 Nov 2025
Release three – four mailhouse jobs (Service Delivery)	16 Feb 2026
Release four – two mailhouse jobs	13 Apr 2026
Release five – one mailhouse jobs (invoicing)	18 May 2026
Release six - one mailhouse jobs (invoicing)	8 June 2026
Release seven – two mailhouse jobs (manual)	29 June 2026
Early Life Support complete	11 July 2026
Closeout phase start	29 June 2026
Project End Report approved (project closed)	11 July 2026

Project Cost Management

DETAIL OF PROJECT (Amounts in \$000s)	TOTAL		FY24/25	FY25/26	FY26/27
ACC Personnel	586	38%	67	506	13
Contractor resource	277	18%	58	219	0
ACC technology/ ARTs	213	14%	66	147	
Marketing Impact	423	27%	181	242	
Other Costs	15	1%	15	0	0
Project Overheads	45	3%	12	33	0
TOTAL	1,560	100%	399	1,147	14
<i>Capex/Opex split:</i>					
Capex	0	0%	0	0	0
Opex	1,560	100%	399	1,147	14
TOTAL	1,560	100%	399	1,147	14

Budget	Total	FY24/25	FY25/26
People Costs	742	-	742
Mailhouse Provider Costs	180	-	180
Contingency	250	-	250
	1,172		1,172

Cost vs budget

- The majority of costs will be incurred in FY26 and are in line with the budget. The anticipated costs in FY25 of \$400k will be offset by savings from within Corporate & Finance.

Risks to costs

- ACC technology costs are an estimate and a full review of requirements has not been completed. Therefore there is a risk that these costs will increase.
- Marketing Impact's cost estimate is based on ACC requirements as currently understood. If ACC has additional requirements this could increase Marketing Impact costs. If ACC misses agreed milestones with Marketing Impact, this could delay the project and increase costs at MI and ACC

Cost opportunities

- If the project runs smoothly and the team is able to establish a repeatable operating rhythm for each release, there may be opportunity to reduce the cost by reducing project management to half time after Christmas - Possible
- Deliver early – if the project can speed up, we would be able to reduce project management, BA and testing costs – Unlikely

Cost management

- Costs are being managed under cost centre 873.
- Marketing Impact costs and ACC project costs will be tracked monthly, variances investigated, and risks to the internal cost forecast identified.
- MI will provide a monthly summary highlighting whether their costs are tracking to plan, any rationale for variances and risks to the total project cost.
- The steering committee monthly update will provide a summary of how costs are tracking and identify risks to the estimated project cost.



Project Governance and Committee Terms of Reference

Role	Responsibility	Decisions	Who
Senior Business Owner	- Advocate for the project within ACC and secure necessary resources. - Ensure the project has adequate financial resources.	- Significant decisions related to funding and overall project direction. - Significant additions or changes to scope	[Out of scope]
Steering Committee	- Ensure the project aligns with ACC goals. - Review and approve significant project changes, costs, and timelines. - Review project status reports to ensure the project stays on track. - Address escalated risks or issues from the project team. Link to Steering Committee Terms of reference	- Endorse high level plan - Significant changes to project scope, costs and timeline	[Out of scope]
Business owner	- Articulate business needs and requirements for the project. - Ensure project outcomes align with business objectives. - Offer feedback and input throughout the project. - Offer guidance and support to the project manager as needed. - Cost centre owner	- Endorsement of detailed solution, delivery plan, timeline and costs - Changes to requirements where these impact costs or timeline - Approve detailed project solutions where the outcome is different to current process or expectations - Approve move to go live/ TCAB	[Out of scope]
Project Manager	- Develop the project plan and manage day-to-day project activities. - Lead project team to ensure tasks are completed on time. - Manage relationship with Marketing Impact, including service orders - Monitor and control the project budget, providing monthly updates to the steering committee. - Provide status updates to stakeholders and steering committee. - Identify, assess, and mitigate project risks. - Ensure that project deliverables meet the required quality standards.	Decisions about project activities, issues and risks within agreed time and costs.	[Out of scope]
Lead Business Analyst	- Subject matter expert for mail house across the project - Lead business requirements documentation process - Review and consult on document proofing - Plan and implement transition to BAU	- Changes to document requirements that don't impact budget or time (assuming appropriate sign off - Legal, privacy, comms, document owner) - Final sign off on document proofing stage	[Out of scope]

Key Risks

Risk Description (If/Then)	Current (residual)		Treatment / Mitigation Plan	Target (Post Treatment)	
	Impact	Risk Rating		Impact	Risk Rating
	Likelihood			Likelihood	
As current state is not well documented, unexpected requirements may be identified resulting in delays and/or increased costs and/or errors in correspondence	Minor	High	Marketing Impact provided with all current documentation. Process to evaluate unexpected requirements as soon as arise Comprehensive testing before go live	Minor	Medium
	Almost certain			Possible	
ACC will share identifiable (PII) data with MI for testing/build purposes. This creates a risk of a privacy breach for ACC.	Moderate	Medium	PRA completed and approved Interim approval from info security.	Moderate	Medium
	Possible			Unlikely	
If EOS and Guidewire to Cloud projects conflict with project timelines or deliverables this could result in additional testing and/or delays to the project	Minor	Medium	No changes to Guidewire planned . Minor EOS letter changes required Working with ARTs to manage timing and identify impacts early	Minor	Low
	Likely			Unlikely	

- We are working with Risk to finalise risk ratings and complete a Risk Profile Assessment (requested by EPMO).

Appendix

Key project deliverables

- Project plan
- Marketing Impact transition plan and solution design
- List of mail house jobs in scope
- Current target milestone dates (published on Project sharepoint site)
- Project gant chart
- Risk and Issue register
- Decision register

RELEASED UNDER THE
OFFICIAL INFORMATION ACT



Minutes

Meeting: Mailhouse transition project Steering committee

Date: 7th May 2025

Time: 3.30pm to 4pm

Attendees	
[Out of scope] (SRO)	Head of Financial Services
[Out of scope] (Business Owner)	Manager Treasury & Revenue Operations
[Out of scope]	Head of Enterprise Procurement
[Out of scope]	Manager DCE Office
[Out of scope]	Team Manager, Levy Systems and Processes
[Out of scope]	Manager, IT Enterprise Planning

Apologies: [Out of scope], Manager Client Administration

Agenda items and discussion

1. Project Scope and Timeline
 - The project scope and target timeline were presented in the pack
 - The timeline is a target, rather than locked in dates.
 - [Out of scope] asked about the risks around the timeline. [Out of scope] said that the primary risk is that requirements are not documented, and so there is a risk that effort, cost and time could slip as requirements are finalised – this will happen iteratively through the project.
 - [Out of scope] asked whether there was a dependency on others to complete the out of scope items:
 - [Out of scope] is working on a ministerial exemption for e-invoicing
 - BAU mailhouse activity is managed out of [Out of scope] team as usual.
 - The solution does not include any new Axway transfers and [Out of scope] is managing this closely
 - No requirements for changes to source system data files have been identified in the planning of the project. There is a risk that a requirement may arise during the project.



2.	Project Cost Management • The project cost forecast was presented in the pack. • [Out of scope] noted that the forecast costs for this financial year are not budgeted for but can be absorbed and the costs for next financial year are budgeted for.
3.	Governance • The project governance was outlined in the pack and the steering committee terms of reference was attached. ENDORSEMENT: The steering committee endorsed the steering committee terms of reference. ACTION: [Out of scope] to send her endorsement as SRO to [Out of scope] when she has had time to have a final review of the document.
4.	Key Risks • The top three risks were presented in the pack. • [Out of scope] noted that she is reviewing the risks and risk ratings with [Out of scope] from Corporate & Finance so these may change. • [Out of scope] asked about whether we had a resource risk. [Out of scope] said yes this was the next key risk and there are resource risks for Levy Systems and Processes, Technology and SME support. [Out of scope] noted that Steering Committee members are all supporting the project to get resourcing.

From: [Out of scope]
Sent: Friday, 13 June 2025 11:47 am
To: [Out of scope]
Subject: RE: Mail house transition steering committee - June meeting

Good morning

Here are the minutes from today's Mailhouse transition project steering committee.

Apologies:

- [Out of scope]
- [Out of scope] delegate

Key discussion points:

- [Out of scope] noted that the project is going well, but as expected there are several issues that we are managing.
 - Following discussions with Marketing Impact this week, we are moving the dates for release one out by two weeks to 14th September and for release two by one week to 1 December.
 - We will do a replan of the remaining releases in late July/ early August and present this to the steering committee at the August meeting.
- [Out of scope] asked about potential impact on project end date of the current delays and whether we should extend the incumbents' contracts a couple of months longer to mitigate this. Currently we have asked for extensions to 31 July 2026 and the project is planning to be completed by 30 June 2026.
- [Out of scope] asked about managing leave and backfill should [Out of scope] or other key BAs be unavailable. [Out of scope] said we had allowed for three weeks leave at Christmas but no other capacity. [Out of scope] said that options are being explored.
- [Out of scope] checked when the next committee meeting is – it is on Tuesday 15th July . If we identify issues earlier, we will keep the committee informed.
- [Out of scope] said that there are challenges with the Guidewire non-production environment as it mostly has Personal information in it. This is being worked through by our test lead and is a risk for release one.

Decisions:

- The Steering committee endorsed the recommendation to decline the change request to bring a change to the EOS Claims Assessment file into scope of the project.

Actions:

- Consider whether we should extend the incumbents' contracts by 13 or 14 months instead of 12 months to manage the risk of further delays - [Out of scope]

- Add an overall project Green/ Amber/ Red to the reporting and steering committee packs going forward - [Out of scope]

Have a great weekend

[Out of scope]

[Out of scope], (She/Her)
Project Manager
ACC

Tel [Out of scope]

[ACC Website](#) | [ACC Newsroom](#) | [Facebook](#) | [Instagram](#) | [LinkedIn](#) | [YouTube](#) | [Twitter](#)

-----Original Appointment-----

From: [Out of scope]

Sent: Thursday, 8 May 2025 8:39 am

To: [Out of scope]

cc: [Out of scope]

Subject: Mail house transition steering committee - June meeting

When: Friday, 13 June 2025 9:30 am-10:00 am (UTC+12:00) Auckland, Wellington.

Where: Microsoft Teams Meeting; ~Justice 12.02 - Cricket ~ 12 max

This is a time for our monthly steering committee meeting.

I will circulate the pack a couple of days before the meeting.

[Out of scope]

Microsoft Teams [Need help?](#)

[Join the meeting now](#)

Meeting ID: [Out of scope]

Passcode: [Out of scope]

Dial in by phone

[Out of scope] # New Zealand, Wellington

[Find a local number](#)

Phone conference ID: [Out of scope]

For organizers: [Meeting options](#) | [Reset dial-in PIN](#)

Please note that some calls to ACC are recorded for training or compliance reasons.

RELEASED UNDER THE
OFFICIAL INFORMATION ACT

Mailhouse Transition Project

Steering Committee Meeting

13th June 2025, 9.30am

Justice Centre 12.02 or Teams Meeting

Prepared by [Out of Scope], Project Manager

Steering Committee Members

[Out of Scope]



He Kaupare. He Manaaki. He Whakaora.
Prevention. Care. Recovery.

Agenda

1. Overview
2. Delivery risks and impacts
3. Decision - EOS file changes for Claims Acceptance letter
4. Cost update

RELEASED UNDER THE
OFFICIAL INFORMATION ACT

Overview

- Release one activities have been on track for delivery as scheduled with some risks. However, this week Marketing Impact have requested that we move out the go live date by one to two weeks. This is due to the number of change requests and to give them sufficient time to ensure all automations are fully tested at their end before we commence end to end testing.
- We are now working with Marketing Impact to replan release one, and expect to move go live from 30 August to 13 September**
- We want to maintain some contingency for current and future issues which may arise.
 - Several identified risks have materialised and are being managed (slide 4).
 - Seven minor change requests have been approved due to misalignment of Marketing Impact and ACC interpretations of requirements. (listed in Appendix).
 - Some tasks been identified which were not in the original plan or are more complex than originally understood.
- Requirements for release two and three have been delayed for a couple of jobs. While this is not currently delaying the project, we will need to catch up in order to complete release two and three on time.
- We will do a replan of the rest of the project with Marketing Impact before release one goes live, based on what we have learnt in our first release.

Set up deliverables		Release deliverables/ milestones	Release one	Release two	Release three
Solution design	23-May-25	Requirements			
Test Plan	29-May-25	Service Delivery Letter content/branding	Not applicable	Not applicable	15-Jul-25
C&A	30-Jul-25	Requirements complete	12-May-25	16-Jun-25	8-Sept-25
Mktg Impact Production Service Order	30-Jul-25	Test files ready for MI	12-May-25	16-Jun-25	8-Sept-25
Service transition plan	30-Aug-25	Transfer specifications complete	12-May-25	16-Jun-25	30-Jun-25
		Development			
Western Mailing & NZ Post Datam		Marketing Impact development - ready for proofing to begin	30-Jun-25	22-Sept-25	27-Oct-25
Contract extensions	31-Jul-25	Axway changes ready for E2E testing	19-Jul-25	13-Oct-25	24-Nov-25
Transition plans	31-Jul-25	Testing			
		Document proofing approvals complete	14-Jul-25	13-Oct-25	24-Nov-25
KEY:					
Not started		Non prod set up and baseline testing completed	TBC	TBC	TBC
On track		Security testing	TBC	TBC	TBC
At risk or delayed - being managed		End to end testing completed	15-Aug-25	7-Nov-25	19-Dec-25
Significant issues impacting project timeline or cost		Go live			
Complete		Go Live	30-Aug-25	22-Nov-25	14-Feb-25

Risks being managed

Impact	Description	Impact	Actions
1. Delays in requirements preparation due to Guidewire to Cloud project and other external impacts	Over the last couple of weeks, [Out of scope] has needed to focus on impact assessments for the Guidewire to Cloud project and regulatory changes on BAU and project mailhouse jobs. This has taken her off her project tasks.	We are two weeks behind in requirements documentation. This does not impact release one, but if we don't make up the time, it could impact releases two and three. In general our BA capacity is very tight and there is minimal room to flex. There is a risk of ongoing impacts on project timelines, when Guidewire to Cloud goes live in mid November and when the April 1 Levy changes are being delivered.	Other team members are progressing with their related deliverables as much as possible [Out of scope] is back onto requirements documentation this week and is hoping to make up the time. We are exploring backups for [Out of scope] as this kind of impact is likely to continue. There is a weeks contingency built into each of release 2 and 3, which we may be able to use
2. Delayed completion of the Solution Design	Due to a delayed start, followed by unplanned leave, the System architect has not yet completed the solution design.	2+ week delay in completion of Solution design. This has delayed the C&A triage and confirming requirements for security and performance testing. The main concern is completing security testing within the project timeline. We also have not been able to tell Marketing Impact if/ when it will be required and what the impact will be on them.	We have a draft solution design document, and the test lead and the security consultant are making as much progress as they can in the interim to identify the testing requirements and plan our approach. It is expected that security testing will be required with Marketing Impact. There is currently enough room in the plan to make up this time.
3. Marketing Impact Capacity	Marketing Impact have asked for additional time to complete release one. This is as a result of: - Allowing time for unexpected requirements and misalignments and questions relating to Guidewire to Cloud - to allow more time for MI to complete their own end to end testing	Delay in release one go live date of one to two weeks. With leave booked at both ACC and Marketing Impact, we only have two weeks flexibility to move out the go live date before we would have to move the date out to October.	We are working with Marketing Impact to replan and move the release one go live date out, and will also be reviewing any impacts on future releases.



Key Delivery Risks

Risk Description (If/Then)	Current (residual)		Treatment / Mitigation Plan	Target (Post Treatment)		Status/ Comments
	Impact	Risk Rating		Impact	Risk Rating	
	Likelihood			Likelihood		
As current state is not well documented, unexpected requirements may be identified resulting in delays and/or increased costs and/or errors in correspondence	Minor	High	Marketing Impact provided with all current documentation.	Minor	Medium	Monitoring 7 minor change requests approved by you or SMO to cover gaps in requirements. (See Appendix). The volume of change has had some impacts on Marketing Impact's delivery.
	Almost certain		Process to evaluate unexpected requirements as soon as arise Comprehensive testing before go live	Possible		
If EOS and Guidewire to Cloud projects conflict with project timelines or deliverables this could result in additional testing and/or delays to the project	Minor	Medium	Working with ARTs to manage timing and identify impacts early	Minor	Medium	Being managed (previous page)
	Likely			Possible		
If organisational priorities or regulatory changes result in key resources being unavailable, it could delay testing and delivery	Minor	Medium	Working with ARTs and key resources to manage timing and identify impacts early.	Minor	Medium	Monitoring The upcoming levy changes for 1 April have the potential to impact the project: • Project SMEs diverted • Potential for file changes
	Likely			Possible		
If subject matter experts and key people are not available or do not have enough capacity, then there may be issues that we do not pick up, and/or the project may be delayed	Moderate	High	Proactive management of absences and project planning. Explore options for backfilling.	Minor	Medium	Being managed (previous page)
	Likely			Possible		
If there are no non-prod environments available for each system, this may result in delays to the project while they are stood up, or incomplete testing being carried out if they cant be stood up, increasing the risk of errors that could impact on the ability to get files to and from MI	Minor	Medium	New non prod environment for Guidewire Axway jobs is being established and is required for end to end testing. Full time tester onboarded to oversee ensuring all non prod environments are ready.	Unlikely	Low	Open
	Possible			Minor		

Change requests - CVR48 data file change

Recommendation

- It is recommended that the steering committee **decline** this change request.
- This recommendation comes from a discussion with [Out of Scope] .

Background

- As part of the review of the Claims Acceptance letter that goes to employers - a section of the letter has been removed. The section being removed provided a targeted message based on the industry of the employer. This will be replaced with a hard coded message to all recipients.
- The project is able to accommodate this change within the current scope of the project. The change means that there will be fields in the data file which are not needed and Marketing Impact can be asked to ignore these fields.

Change requested

- PART has requested that the project remove the EOS code that generates the unused information in the datafile.
- This is best practice, as it keeps the code up to date and removes the need to maintain unnecessary code and reduces the total cost of ownership.
- However the change is not required for the project to be delivered and it creates additional risks for the project.

Impact

- PART cost is estimated at [s 9(2)(b)(ii)]
- Flexibility in release date will be reduced as we will need to align with a PART release date. Potential for delay until after EOS to Cloud goes live in April 2026.
- Additional time for requirements documentation and testing.

Risks of adding this to scope

- Potential for delays in release three timing (currently February 2025). impact of the risk of delay to the project resulting in additional project costs.
- Increased risk of errors due to managing a file change.
- PART can not currently commit to when they will have capacity to make the change, due to organisational priorities. This puts release timing further at risk.

Costs to date

	May-25		Year to date	
	Actual	Forecast	Actual	Forecast
ACC personel	31,962	31,944	37062	38,994
Contractor	21,447	29,370	23,776	31,937
ACC tech/ ARTs	4,008	24,583	13,016	45,925
Marketing Impact	49,620	63,631	118,130	132,141
Other costs	600	0	600	15,000
Total	\$107,637	\$149,528	\$192,584	\$263,997

- Reasons for costs being behind forecast:
 - Contractors: The C&A did not start in May due to delays with the Solution design. This work is starting in June and will continue into July.
 - ACC tech/ ARTs: The ARTs charge a month in arrears and this is not reflected in the forecast. In June there will be a double charge which will make up some of the discrepancy.
 - Marketing Impact: MI charges in May were behind what was forecast. They have moved the forecast from May to June, keeping the total forecast for this financial year unchanged.



Appendix - Change requests

Approved minor change requests

#	Change	Rationale	Cost
1	Envelope artwork creation - MI to create new artwork files for the 3x ACC envelopes	New envelope artwork is required due to moving to the new branding. This work was previously undertaken by True North. Missed from original scoping with MI.	[s 9(2)(b)(ii)]
2	Changes to address cleansing report	Once MI got into the detail of building the address cleansing files, we identified a misalignment between the solution and the data which could result ACC making incorrect updates to addresses. This change removed duplication of files to address this risk.	
4	Increase in number of SSH keys for secure file transfer	Marketing Impacts solution allowed for the set-up and configuration of 1x PROD and 1x NON_PROD credentials for SFTP (secure file transfer). The ACC architect has now stated that we are required to set up 6x PROD and 6x NON_PROD credentials (as separate credentials are required for each of the ACC systems). This is required to meet security requirements.	
5	GNA requirements not all available in release one, resulting in Marketing Impact needing to do additional work in later releases to finalise the GNA management	Marketing Impact were expecting to set up the GNA reporting in release one. Because the project is working through the requirements throughout the project, requirements for the GNA file for EOS, MFP and MyA4B will not be available until later releases. Therefore MI needs to do additional work on GNA reporting in later releases when the final specifications are available.	
6	Unexpected variations in the Client Debt file	A unexpected variation in the client debt file has been identified which will need to be managed – the variation means that the file is not always consistent.	
7	Baselining test files	As part of proofing and testing for each job, we need to baseline two files by sending them to the incumbent supplier and asking for proofs to be created. The purpose of this is 1) to ensure that the non-prod file is fit for purpose 2) to provide proofs of the current letters for comparison during testing. This was not identified in original project plan.	
8	Co-enveloping/ Archive change	The original MI solution assumed that where a letters are co-enveloped – one pdf will be created that holds all the letters. However, ACC needs each letter to have a separate pdf to be uploaded into Guidewire and EOS. The solution needs to be changed to enable both co-enveloping and split proof/archive output.	
	TOTAL Approved		\$10,420

Appendix

Initial project cost baseline

DETAIL OF PROJECT (Amounts in \$000s)	TOTAL		FY24/25	FY25/26	FY26/27
ACC Personnel	586	38%	67	506	13
Contractor resource	277	18%	58	219	0
ACC technology/ ARTs	213	14%	66	147	
Marketing Impact	423	27%	181	242	
Other Costs	15	1%	15	0	0
Project Overheads	45	3%	12	33	0
TOTAL	1,560	100%	399	1,147	14
<i>Capex/Opex split:</i>					
Capex	0	0%	0	0	0
Opex	1,560	100%	399	1,147	14
TOTAL	1,560	100%	399	1,147	14

Budget	Total	FY24/25	FY25/26
People Costs	742	-	742
Mailhouse Provider Costs	180	-	180
Contingency	250	-	250
	1,172		1,172

Links to key project artefacts

- [Project plan](#)
- [Marketing Impact transition plan and solution design](#)
- List of [mail house jobs](#) in scope
- [Current target milestone dates](#) (published on Project sharepoint site)
- [Project gant chart](#)
- [Risk and Issue register](#)
- [Decision register](#)



Appendix

Key project deliverables

- Project plan
- Marketing Impact transition plan and solution design
- List of mail house jobs in scope
- Current target milestone dates (published on Project sharepoint site)
- Project gant chart
- Risk and Issue register
- Decision register

RELEASED UNDER THE
OFFICIAL INFORMATION ACT



Minutes

Meeting: Mailhouse transition project steering committee

Date: 29th July 2025

Time: 11.30am to 12pm

Attendees	
[Out of scope] (SRO)	Head of Finance
[Out of scope] (Business Owner)	Manager Treasury & Revenue Operations
[Out of scope]	Head of Enterprise Procurement
[Out of scope]	Manager DCE Office
[Out of scope]	Manager Client Administration
[Out of scope]	Team Manager, Levy Systems and Processes
[Out of scope]	Levy Systems and Operations Manager

Apologies: [Out of scope], Manager, IT Enterprise Planning

Agenda items and discussion

1.	Project Overview [Out of scope] gave a quick overview of project progress and noted that the project is facing number of challenges as we get into the testing phase of release one.
2.	Proofing timelines - Most of the meeting was spent discussing the challenges faced with proofing timelines outlined in the steering committee pack p4 and 5. [Out of scope] said that the impact on the total project timeline could be longer than the 3+ months in the pack because of downstream impacts on future releases, blackout periods for individual letters and Marketing Impact commitments to other clients. [Out of scope] talked about the importance of getting the content right and the risks when errors come through. [Out of scope] said that it was important to identify when the proofing issues were a Marketing Impact issue so that this could be raised with Marketing Impact.



	• [Out of scope] said that additional issues were often found in the second round of proofing. [Out of scope] noted that insufficient time for the required additional rounds of proofing is one of the key gaps in the timeline. • [Out of scope] asked whether Marketing Impact could help to fill the gap. [Out of scope] said that in release one, the team have identified errors in 54 business rules during the first round of proofing – this was after Marketing Impact had already proofed. This demonstrates ACC needs to do its own proofing. • [Out of scope] suggested that it could be better to bring on more people now if resourcing is an issue. [Out of scope] noted that the proofers need experience in the field and that where we are using a new staff member he is not finding a lot of issues. [Out of scope] commented that the capacity in his team is spread across two big pieces of work, so to increase resource on this project will require pulling people off the invoicing issues. • [Out of scope] suggested two other options relating to risk based testing with different jobs getting different level of proofing.
3.	Project risks • [Out of scope] drew attention to the risks on slide 8. These risks could impact our ability to achieve release one dates. She also noted that End to end testing timelines are also very tight for release one.
4.	Next meeting • The steering committee requested that the next meeting be longer to allow for further discussion. • A revised plan will be presented at this meeting.

Mailhouse Transition Project

Steering Committee Meeting

29th July 2025, 11.30am

Justice Centre 14.02 or Teams Meeting

Prepared by [Out of scope], Project Manager

Steering Committee Members

[Out of scope] (Senior Responsible Owner)

[Out of scope] (Business Owner)

[Out of scope]

[Out of scope]

[Out of scope]

[Out of scope]

[Out of scope]

[Out of scope] (Apology)



He Kaupare. He Manaaki. He Whakaora.
Prevention. Care. Recovery.

Agenda

1. Overview
2. Current issues:
 - Proofing timing
 - Release three requirements
 - Document composition costs
3. Risks
4. Cost update
5. Appendix
 - Change requests
 - Project documentation

RELEASED UNDER THE
OFFICIAL INFORMATION ACT

Overview

General progress update.

- The project team are working well and progressing through the plan
- Five minor change requests have been submitted (see appendix):
 - Three CRs relate to areas where work is more complex than expected – document composition and document proofing. It is expected that there will be further cost impacts for these as the project progress. (p4 and 7)
 - Two CRs relate to requirements from ACC which were not included in the original transition plan.
- There has been sick leave across the several members of team which has impacted deliverables. The team have worked hard to make up the time.
- The test team are making good progress with baseline, connectivity and DR testing complete. We are currently looking for ways to increase their engagement with SMEs and with Marketing Impact to ensure smooth delivery of end to end testing.

Release one

- Two areas are of concern – proofing timelines (details on p4) and security testing outcomes (p8)

Release two

- This release is currently on track and Marketing Impact is working to bring forward their deliverables to allow more time for proofing.

Release three

- Due to information gaps for two EOS jobs and downstream impacts from release one, the milestones for delivery of requirements and test files are at risk (p6).

Release one; **Some deliverables at risk**

Release two: **On track**

Release three: **Some deliverables at risk**

Set up deliverables		Release deliverables/	Release one	Release two	Release three
Solution design*	23-May-25	Requirements			
Test Plan	29-May-25	Service Delivery Letter content/branding	Not applicable	Not applicable	15-Jul-25
C&A	30-Jul-25	Requirements complete	12-May-25	30-Jun-25	8-Sept-25
Mktg Impact Production Service Order	15-Aug-25	Test files ready for MI	12-May-25	30-Jun-25	8-Sept-25
Service transition plan	30-Aug-25	Transfer specifications complete	12-May-25		3-Nov-25
		Development			
Western Mailing & NZ Post Datam		Marketing Impact development - ready for proofing to begin	30-Jun-25	22-Sept-25	27-Oct-25
Contract extensions	31-Jul-25	Axway changes ready for E2E	19-Jul-25	13-Oct-25	24-Nov-25
Transition plans	31-Jul-25	Testing			
		System integration and DR testing complete	25-Jul-25	27-Oct-25	TBC
		Document proofing approved	25-Jul-25	13-Oct-25	24-Nov-25
		Baseline testing complete	11-Aug-25	27-Oct-25	TBC
		Security testing	29-Aug-25	NA	NA
		End to end testing complete	29-Aug-25	14-Nov-25	19-Dec-25
		Go live			
		Go Live	13-Sept-25	29-Nov-25	14-Feb-25

* Solution design is currently in review but marked as complete from project perspective as we have no further dependencies on this

Proofing timelines impact (1/2)

For Discussion

Overview of issue

- The project timeline underestimated the time required for ACC to proof documents, Marketing Impact to make changes and ACC to approve the final documents. For release one, I estimate that the proofing will take two weeks longer than planned. Reasons for this are:
 - The proofing includes more scope items and complexity than realised when we developed the plan
 - The plan did not allow sufficient time for the level of retesting that the team completes
 - The testing team are new to the work and need time to come up to speed

Actions to date

- Marketing Impact have met with [Out of scope] and [Out of scope] to present suggestions on alternative ways to approach proofing.
- [Out of scope] has completed coaching with the proofing team to share ideas for streamlining their work.

Impact

- Release one: When Marketing Impact asked for an extension for release one, this took out our contingency plan which could have accommodated some of this. However, Marketing Impact has been able to flex to accommodate our additional time and the go live date is not currently impacted. This will however depend on proofing retest outcomes.
- Release two: Marketing Impact are aiming to provide ACC with more time for release two testing. There is a good chance that this will preserve the release two timeline.
- Release three and beyond are where the impact falls as the BAs doing the proofing are the same people who are creating test files and documentation required by Marketing Impact to start development. So the time spent on proofing means that there will be delays in providing requirements and test files for future releases.
- Therefore the primary impact of this issue is on releases three onwards

Next steps.

- We will be replanning with Marketing Impact in the first week of August.
- Options which will be considered have been outlined over the page.

Proofing timelines impact (2/2)

For discussion

Options - not mutually exclusive	Pros	Cons
1. Stay with the current proofing approach and resourcing, flex other phases of the project as much as possible to reduce impact	• Robust high quality proofing using subject matter experts • Best quality output and minimises errors • Using SMEs is a key mitigant for the risk of poorly documented requirements as they can identify issues that have not been identified and understand Guidewire and the work arounds in place.	• Best guess of an increase of 3+ months to the project timeline (detailed analysis required to confirm time impact)
2. Put more people onto the project – either SMEs or experienced BAs or testers	• Increase in capacity allowing proofing and test file collation to run concurrently and reduce time impact • Release some pressure from current team and [Out of scope]	• Need to take time away from project to onboard and upskill - Impact on [Out of scope] capacity to complete requirements and BAU deliverables • Availability of SMEs from [Out of scope] team – team is already at capacity • Significant upskilling time required • Increased risk of missing errors or misunderstanding requirements due to lack of SME / Guidewire knowledge • Potential for errors to result in legal, reputational, privacy and service impacts, loss of customer trust
3. Change proofing and reproofing approach – risk based approach	• Reduce time taken for proofing and reproofing . • Focus on the highest risk areas	• Increased risk of missing errors and sending incorrect letters and invoices. Currently three BAs check everything and each picks up different things. • Potential for errors to result in legal, reputational, privacy and service impacts, loss of customer trust • Requirement for clean up after go live to address outstanding bugs

Release three requirements and test files

For noting

Overview of issue

- Release three consists of three EOS jobs and one MFP job.
- There is a lack of detailed documentation and subject matter/ technical expertise for two of the EOS jobs which increases the risk of unexpected outcomes during proofing.
 - Client Payments letters:
 - Requirements and content is complex which has resulted in questions from the business that have been challenging to answer during content review.
 - There is limited technical SME knowledge and documentation.
 - Claims Acceptance letters – there is no requirements document at all. While the letter content requirements are relatively straightforward, there is a gap in understanding of underlying data rules (eg suppressions).

Actions to date

- We have requested technical information from PART on the client payments letters. There have been delays getting this and the full information will be available on 1st August.
- We have been working with the business [Out of scope] to get a better understanding of what is in and out of scope (work in progress)
- [Out of scope] has requested technical information from Datam on how they are transforming the data for Claims Acceptance letters. This arrived 25th July.

Impact

- This is delaying preparation of the requirements documents.
- In addition, with the additional proofing time required for release one, we are behind with creating test files for release three.
- The due dates for providing requirements and in particular test files are at risk
- Testing will need to be comprehensive to ensure we have not missed anything.

Next steps.

If time can not be made up, I propose descopeing the MFP job from this release, moving that job to a later release so that we can increase our chance of meeting the EOS to Cloud timeline for the EOS jobs (Chill request has been approved).

Target dates for release 3 requirements and test files

#13 Client travel reimbursement notifications	4 Aug 2025
#2 Claim acceptance letters	4 Aug 2025
#12 Client payment notifications	1 Sep 2025
#14 Provider Payment notifications	8 Sep 2025

KEY:

Not started
On track
At risk or delayed - being managed
Significant issues impacting timeline or cost
Complete

Increase in document composition costs

For noting

- We anticipate that the cost of document composition is going to continue to increase over the project.
- Document composition is where Marketing Impact is building the templates and letters within their software based on the documented ACC requirements.
- The transition plan allows [s 9(2)(b)(ii)] for this work (SOW26).
- Two change requests have been approved for additional hours for document composition for release one, an increase in cost of [s 9(2)(ba)(ii)]
- The increases reflects that there was more back and forth discussions than expected due to:
 - The challenges of applying new branding and working with a new vendor
 - New issues being identified in future release requirements which then needed to be reworked in the current release documentation to maintain consistency.
 - Requirements being more bespoke for each letter than Marketing Impact expected, due to the complexities and differences between the letters.
- We anticipate that this kind of cost overrun will continue, albeit the number of changes should reduce as core decisions get made, we become more familiar with Marketing Impact's processes and Marketing Impact becomes more familiar with our documentation and branding.
- With 13 more jobs still to be built, we could be looking at a maximum total overspend of [s 9(2)(b)(ii)] for document composition. We will continue to submit change requests as we progress.

Risks being managed

Impact	Description	Impact	Actions
From last meeting (updated):			
1. Delays in requirements preparation due to Guidewire to Cloud project and other external impacts	[Out of scope] needed to focus on impact assessments for the Guidewire to Cloud project and regulatory changes on BAU and project mailhouse jobs. This took her off her project tasks.	[Out of scope] has completed the release two requirements and Marketing Impact accommodated the delay. There is ongoing risk of impacts on project timelines, when Guidewire to Cloud goes live in mid November and when the April 1 Levy changes are being delivered.	We are expecting test files for Guidewire to Cloud and when they provide these, this will again take [Out of scope] away from project work for a week or so and potentially impact project deliverables. The timing for this is unknown.
2. Delayed completion of the Solution Design	Due to a delayed start, followed by unplanned leave, there was a delay in completing the solution design which delayed the C&A (Security)	The C&A is now on track. However it took several weeks to confirm Security testing requirements as [Out of scope] and [Out of scope] expected Marketing Impact to pay for the testing, while the MI contract does not state this. This is now resolved and ACC is paying for the testing (cost was already included in project budget). As a result, we are doing security testing very late in the project, during end to end testing. If any major issues arise during this testing, we will not have time to fix these before we go live and this will delay release one.	The security testing is scheduled for 20 to 28 August. We will monitor outputs closely and inform the steering committee of any issues. I have committed to reviewing this issue in the Lessons learned phase of the project to understand what led to the misalignment in expectations.
3. Marketing Impact Capacity	Marketing Impact asked for additional time to complete release one.	Release one and two have been replanned and release dates moved out. Marketing Impact are on track for the new dates. However, this replan took out our week of contingency time which has removed our capacity to manage other issues.	We are going to replan with Marketing Impact in the first weeks of August. We will continue to monitor this one as part of regular risk management.

Key Delivery Risks

Risk Description (If/Then)	Current (residual)		Treatment / Mitigation Plan	Target (Post Treatment)		Status/ Comments
	Impact	Risk Rating		Impact	Risk Rating	
	Likelihood			Likelihood		
As current state is not well documented, unexpected requirements may be identified resulting in delays and/or increased costs and/or errors in correspondence	Minor	High	Marketing Impact provided with all current documentation.	Minor	Medium	Issue (See EOS issue on p6) 5 minor change requests approved (See Appendix).
	Almost certain		Process to evaluate unexpected requirements as soon as arise Comprehensive testing before go live	Possible		
If EOS and Guidewire to Cloud projects conflict with project timelines or deliverables this could result in additional testing and/or delays to the project	Minor	Medium	Working with ARTs to manage timing and identify impacts early	Minor	Medium	Monitoring (previous page)
	Likely		Possible			
If organisational priorities or regulatory changes result in key resources being unavailable, it could delay testing and delivery	Minor	Medium	Working with ARTs and key resources to manage timing and identify impacts early.	Minor	Medium	Monitoring The upcoming levy changes for 1 April have the potential to impact the project: • Project SMEs diverted • Potential for file changes
	Likely		Possible			
If subject matter experts and key people are not available or do not have enough capacity, then there may be issues that we do not pick up, and/or the project may be delayed	Moderate	High	Proactive management of absences and project planning. Explore options for backfilling.	Minor	Medium	Issue The time required by the BAs to complete proofing and the downstream impact on requirements, test file collation is currently an issue (p5)
	Likely		Possible			
If there are no non-prod environments available for each system, this may result in delays to the project while they are stood up, or incomplete testing being carried out if they cant be stood up, increasing the risk of errors that could impact on the ability to get files to and from MI	Minor	Medium	New non prod environment for Guidewire Axway jobs is being established and is required for end to end testing. Full time tester onboarded to oversee ensuring all non prod environments are ready.	Unlikely	Low	Open Non prod environments are booked for release one
	Possible		Minor			

Costs to date

	Jun-25			FY25			Total project		
	Actual	Forecast	Variance	Actual	Forecast	Variance	Forecast	Baseline	Variance
ACC personnel	30,024	30,324	-300	67,086	67,386	-300	646,646	586,000	60,646
Contractors	19,754	28,249	-8,495	43,530	52,016	-8,486	273,470	277,000	-3,530
ACC tech/ ARTs	18,471	36,000	-17,529	31,487	49,019	-17,532	166,157	213,000	-46,843
Marketing Impact (includes phase 1,2,3)	48,559	47,740	819	183,130	182,311	819	464,743	423,000	41,743
Other costs	525	15,600	-15,075	1,125	16,200	-15,075	19,425	15,000	4,425
Project overheads							0	45,000	-45,000
Total	117,333	157,913	-40,580	326,358	366,932	-40,574	1,570,441	1,560,000	10,441

- ACC Personnel costs forecast unfavourable to budget as rates were adjusted since the baseline was set.
- Tech/ ARTS costs are not coming through as fast as expected. Have reduced forecast and will monitor and review.
- Marketing Impact forecast increase due to change requests (slide 11) and the purchase of envelopes which is a BAU cost, but has been processed under the project service order because required before production contract signed (\$26,700). This will be corrected in August.
- Other costs - due to the delay with the C&A, security testing costs have been delayed until August, along with some contractor costs.
- Project overheads included in original budget, but not required.

Appendix - Change requests

Approved minor change requests since last meeting

#	Change	Rationale	Cost
11	Marketing Impact on call	Tech require Marketing Impact to be on call for the Saturday that ACC is releasing our production changes	[s 9(2)(i)]
12	Release one document composition	See slide 7	
13	CPX PC document composition	See slide 7	
14	Connectivity testing	Additional meetings and testing not in original scope	
15	Proofing support	Advice and documentation to support ACC proofing approach (Approval pending)	
		Total since last steer comm	
		<i>Previously reported</i>	
		GRAND TOTAL	\$23,910

Appendix

Initial project cost baseline

DETAIL OF PROJECT (Amounts in \$000s)	TOTAL		FY24/25	FY25/26	FY26/27
ACC Personnel	586	38%	67	506	13
Contractor resource	277	18%	58	219	0
ACC technology/ ARTs	213	14%	66	147	
Marketing Impact	423	27%	181	242	
Other Costs	15	1%	15	0	0
Project Overheads	45	3%	12	33	0
TOTAL	1,560	100%	399	1,147	14
<i>Capex/Opex split:</i>					
Capex	0	0%	0	0	0
Opex	1,560	100%	399	1,147	14
TOTAL	1,560	100%	399	1,147	14

Budget	Total	FY24/25	FY25/26
People Costs	742	-	742
Mailhouse Provider Costs	180	-	180
Contingency	250	-	250
	1,172		1,172

Links to key project artefacts

- [Project plan](#)
- [Marketing Impact transition plan and solution design](#)
- List of [mail house jobs](#) in scope
- [Current target milestone dates](#) (published on Project sharepoint site)
- [Project gant chart](#)
- [Risk and Issue register](#)
- [Decision register](#)



Appendix

Key project deliverables

- Project plan
- Marketing Impact transition plan and solution design
- List of mail house jobs in scope
- Current target milestone dates (published on Project sharepoint site)
- Project gant chart
- Risk and Issue register
- Change request register

RELEASED UNDER THE
OFFICIAL INFORMATION ACT



Minutes

Meeting: Mail house Transition Project steering committee

Date: 13 August 2025

Time: 11am to midday

Attendees	
[Out of scope] (Business Owner)	Manager Treasury & Revenue Operations
[Out of scope]	Head of Enterprise Procurement
[Out of scope]	Manager DCE Office
[Out of scope]	Manager Client Administration
[Out of scope]	Team Manager, Levy Systems and Processes
[Out of scope]	Levy Systems and Operations Manager

Apologies: [Out of scope] (SRO), Head of Finance

1. Overview

- [Out of scope] opened the meeting and noted that there is a lot of work going on to understand the project and what we need to do. He noted the challenges the project is facing.
- [Out of scope] explained that she has revisited all project assumptions based on release one experience. Planned project dates are not achievable due to tasks taking significantly longer than expected and concurrent tasks now overlapping. She noted that the team is now all focused on Release 1 tasks and as a result this is impacting Release 3.
- [Out of scope] noted that the timeline was developed based on our best judgement at the time and a lot has been learnt since then.
- Release one was planned for 13th September, but due to proofing not being approved in time this date will not be met. Until we understand how long proofing will take and what availability there is for ACC test environments and Marketing Impact resources a new date can't be given yet.
- [Out of scope] noted that Marketing Impact are also finding the work complex.
- [Out of scope] asked what is making the proofing more complex than BAU proofing.
 - [Out of scope] replied that complexity is due to the number of business rules and having to proof more items such as email formats, reporting etc that are not included in BAU proofing.
 - [Out of scope] noted that team inexperience is also factor. Inexperienced proofers are missing issues, increasing Lauren's workload.
 - [Out of scope] noted that the CPX letter currently being proofed is contractually binding and so it is important to get the wording correct.

2. Requirements and test file creation recommendations

- [Out of scope] asked whether having one person ([Out of scope] on requirements is a factor in delays. [Out of scope] replied that the project cannot go faster than [Out of scope] can write and finalise requirements. Until [Out of scope] replans the other components of the project it is not clear whether more writers would necessarily speed up the project. However, more writers would provide the opportunity to go faster and reduce risk. Any more writers would need to have the right skills.



- [Out of scope] commented that Service Delivery does not specifically have BA skills as this has all been centralised but she can talk to [Out of scope] to see if anyone does have the skillset. [Out of scope] said she expected Service Delivery requirements would need to stay with [Out of scope]
- [Out of scope] and [Out of scope] noted that [Out of scope] is very positive about the quality of the requirements documentation that [Out of scope] is producing – some of the best he has seen.
- [s 9(2)(g)(i)]
- [Out of scope] asked [Out of scope] what support he would recommend as [Out of scope] manager, he replied that he has put a suggestion to [Out of scope] [Out of scope] asked that [Out of scope] add the additional steps we need to take for [Out of scope] to the recommendations in the pack if they are missing.
- [Out of scope] said that everyone would agree that we are looking to support [Out of scope] and appreciate her knowledge and effort.

4. Proofing Recommendations

- [Out of scope] summarised the issue being that the timeline did not accommodate how long proofing would take and how many rounds would be required.
- [Out of scope] [Out of scope] and [Out of scope] have been talking to [Out of scope], Practice Manager Quality so he can review our proofing approach and recommend a risk-based proofing approach. [Out of scope] noted that we don't know the details of what a risk based approach would look like as the review is not done yet and so we don't know what the time saving will be.
- The pack also recommended another SME, more proofers and a test lead to take pressure of current SMEs – [Out of scope] and [Out of scope] [Out of scope] noted that there is potential for operational teams to support proofing. This can be informed by [Out of scope] review.
- [Out of scope] noted that the team will be quite nervous about a change in approach and getting it well set up will be essential.
- [Out of scope] commented that Marketing Impact are proofing business rules in isolation rather than holistically and have missed issues. So [Out of scope] is concerned that we are going down that route. [Out of scope] said that Marketing Impact did not propose a risk-based approach so we don't know whether Marketing Impacts approach is what [Out of scope] will propose. [Out of scope] asked whether [Out of scope] will determine what is high risk and Katie said no – [Out of scope] will propose an approach; the business will decide risk levels.
- [Out of scope] commented that the pack says release two proofing starts on 1 September, but this is peak invoicing so this will impact ability to use additional resources. He also asked where the additional SME will come from. [Out of scope] said that this was a recommendation and still to be determined.
- [Out of scope] also raised concerns about onboarding new SMEs, test lead and proofers and the impact on [Out of scope] and that time will need to be allowed for her to do a handover.
- [s 9(2)(g)(i)]
- [s 9(2)(g)(i)]
- [s 9(2)(g)(i)]
- Steering committee agreed they will wait for [Out of scope] review before agreeing proofing changes.

5. Release Order Approach

- [Out of scope] noted that all dates are now slipping .
- Release three dates are now coming up against the EOS to Cloud freeze period and other releases will need to be rescheduled to avoid seasonal peaks.
- To reschedule [Out of scope] needs new assumptions to be finalised as outlined on previous pages.
- [Out of scope] said that date changes impact incumbent providers as well. Western Mailing has said that they are flexible on go-live dates.

6. Summary of suggested changes

- [Out of scope] summarised the recommendations in the pack. She said that she was confident that the project timeline will move well beyond June 2026. Until the resourcing and proofing approach recommendations are finalised its not possible to replan the project.
- [Out of scope] asked whether proofers get faster over time and [Out of scope] said that some improvement can be expected. [Out of scope] noted that the jobs get more complex as the project proceeds so this offsets the increased competency.
- [Out of scope] said real thought needs to be put into sharing proofing results in real time so that we don't get double up and rework.
- [Out of scope] and [Out of scope] discussed the stress on other project team members with continual test file creation and proofing and whether the team members will need to be rotated off the project to address this.
- [Out of scope] noted the estimated costs of the additional resourcing and that these would need covered out of one of his cost centres.
- [Out of scope] commented on the need to add back up/support for [Out of scope] to the recommendations.

Action points

	What	Who	When
1	Provide [Out of scope] with required skill details for requirements writing	[Out of scope]	Done
2	Check with [Out of scope] for potential resources in service delivery, pending [Out of scope] skill requirements.	[Out of scope]	18/8/25
3	Discuss backup support options for [Out of scope] with [Out of scope] and add to the recommendations so that [Out of scope] can include additional resourcing and recognition in paper to [Out of scope]	[Out of scope]	18/8/25
4	Expand the resourcing paper to [Out of scope] to include all resource requests following [Out of scope] feedback	[Out of scope]	TBC
5	Kick of review of proofing approach with [Out of scope] and [Out of scope]	[Out of scope]	15/8/25
6	Book a follow-up meeting next week after [Out of scope] review and conversations with [Out of scope]	[Out of scope]	15/8/25
7	Assess and provide a new project timeline, including job order when recommendations and proofing approach is agreed.	[Out of scope]	TBC

Mailhouse Transition Project

Steering Committee Meeting

13 August 2025. 11am

Justice 12.02 Cricket or Teams Meeting

Prepared by [Out of Scope], Project Manager

Steering Committee Members

[Out of Scope]



He Kaupare. He Manaaki. He Whakaora.
Prevention. Care. Recovery.

Agenda

1. Overview
2. Release One
3. Requirements and test file creation recommendations
4. Proofing recommendations
5. Release order approach

RELEASED UNDER THE
OFFICIAL INFORMATION ACT

Overview

- Following the last meeting, the project team has been focussed on release one, with additional resources applied to proofing in an effort to meet the target dates.
- However, despite this effort, the proofing was not approved by the due date and we are not able to enter end to end testing as planned. The go live date will therefore be impacted and we will be replanning.
- At the same time, we have reviewed the underlying assumptions behind the plan based on progress to date and this has identified very significant challenges with future releases.
 - Due to the complexity of the jobs and the additional scope items involved in setting up completely new jobs (compared with BAU proofing):
 - Proofing is taking 3 to 4 times longer than was estimated.
 - Test file collation is taking 2 to 3 times longer than was estimated.
 - Requirements reviewing, requirements mapping and test file creation were planned to be done concurrently. The BAs have requested that these activities are run consecutively adding around three weeks per job.
- As the same people are doing all of the above tasks, this has created considerable resource contention and as a result we can not deliver to our forecast dates.
- In addition, due to lack of information on some release 3 (EOS) jobs, the impact of other projects (Guidewire to Cloud, Safer Levy changes) and focus on release one proofing, the preparation of release 3 requirements is now over a month behind schedule compounding the problems.
- Marketing Impact are also finding the work complex, and we have added two additional weeks to release one for them to do their own functional testing before we enter end to end testing and this needs to be added to all releases.
- In discussions about release three and beyond, Marketing Impact have mentioned their concerns about the impact on their expected revenue based on the delays that they can see happening.

Release one: **Proofing not approved – go live delayed**

Release two: **Proofing at risk due to time required**

Release three: **Requirements delayed**

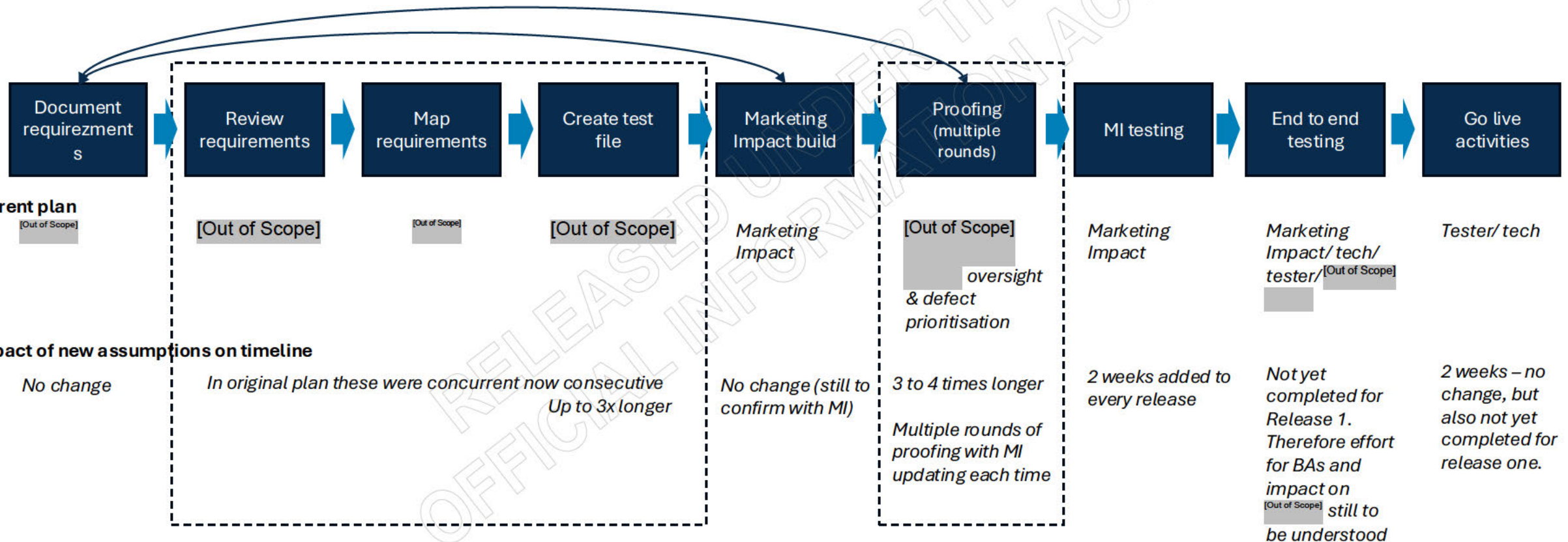
Set up deliverables		Release deliverables/	Release one	Release two	Release three
Solution design *	23-May-25	Requirements			
Test Plan	29-May-25	Service Delivery Letter content/branding	Not applicable	Not applicable	15-Jul-25
C&A	30-Jul-25	Requirements complete	12-May-25	30-Jun-25	8-Sept-25
Mktg Impact Production Service Order	15-Aug-25	Test files ready for MI	12-May-25	30-Jun-25	8-Sept-25
Service transition plan	30-Aug-25	Transfer specifications complete	12-May-25		3-Nov-25
		Development			
Western Mailing & NZ Post Datam		Marketing Impact development - ready for proofing to begin	30-Jun-25	22-Sept-25	27-Oct-25
Contract extensions	31-Jul-25	Axway changes ready for E2E test	19-Jul-25	13-Oct-25	24-Nov-25
Transition plans	31-Jul-25	Testing			
		System integration and DR testing complete	25-Jul-25	27-Oct-25	TBC
KEY:		Document proofing approved	25-Jul-25	13-Oct-25	24-Nov-25
Not started		Baseline testing complete	11-Aug-25	27-Oct-25	TBC
On track		Security testing	29-Aug-25	NA	NA
At risk or delayed - being managed		End to end testing complete	29-Aug-25	14-Nov-25	19-Dec-25
Significant issues impacting timeline or cost		Go live			
Complete		Go Live	13-Sept-25	29-Nov-25	14-Feb-25

* Solution design is currently in review but marked as complete from project perspective as we have no further dependencies on this

Release one

- Despite additional resourcing being applied, proofing for job #5 CPX PC was not approved by the due date and we are not able to enter end to end testing as planned for release one.
- We are now looking at how to replan the go live date. It is not simply a matter of moving the date out by a week to allow another round of testing. The following considerations will impact the replan:
 - How many more rounds of proofing will be required and how long that will take
 - Decisions to be made about questions relating to address cleansing and archive files arising out of round two of proofing
 - Availability of E2E test environments at ACC
 - Availability of Marketing Impact resources to run end to end testing (our primary contact is on planned leave in September)

Job stream development – key activities



Requirements and test file recommendation

- High quality requirements and test files are essential to a smooth release. Overall, this process drives the critical path for the project, as Marketing Impact can not start until these are complete.
- [Out of scope] who has been reviewing our proofing approach has commented on high quality of the requirements that he has seen.
- Moving the review and map file tasks from concurrent to consecutive adds 3+ weeks per job (varies by complexity of the job) but adds to the quality of the output. In total, the estimated elapsed time to prepare the remaining requirements is now 55 weeks, not allowing for any time for other changes such as Guidewire to Cloud or the 1 April changes.
- Increased complexity of test file collation adds about 2 months overall to the project.
- **Recommendations:**
 - No changes are proposed to roles for preparation, review and mapping of requirements.
 - Recommend adding at least one more BA to the test file collation task to balance the additional time required for this step and get the documents to Marketing Impact promptly.
 - Investigate further, whether there is anyone from Service Delivery who can pick up the remaining two requirements documents for SD. My expectation is that this will stay with [Out of Scope]

Proofing recommendation

Without a change to approach and resourcing for proofing, the project timeline will blow out by 18 months, due to resource contention around proofing and test file creation and because the updated assumptions add 250+ days to proofing.

The recommendation is:

- Change to a risk based proofing approach leveraging recommendations from [Out of Scope], Practice Manager Quality. We will be aiming to reduce the forecast proofing time by at least 25% as a result of these changes.
- Bring on a test lead (likely a contractor) to implement the risk based approach and manage proofing.
- Onboard three proofers from Levy operational teams in time to do release 2 proofing starting on 1 September.
- One more full time SME on the project – involved in test file creation and E2E testing in between proofing.
- Reduce time spent on proofing by [Out of Scope] by using a risk based approach to involve them only for high risk or ambiguous business requirements.
- This will enable the proofing team to work independently of the SMEs, and requirements and test file creation can continue in parallel to proofing.
- Consolidate proofing findings as they go and rate defects based on risk to the business. Provide continuous visibility of defects.

Release order

- The release order and timing has a significant impact on Marketing Impact revenue as we have planned smaller easy jobs early in the project and high volume jobs start from release 3. (see job volumes over page).
- Release 2 – currently planned for go live on 1 December 2025
 - With additional resourcing and focus from all SMEs and additional proofers, release 2 may still be able to go live before Christmas, as planned, depending on how much we are able to constrain the proofing timeline.
- Release 3 – currently planned for 14 February 2026. However, with the increased timelines, even with reduced scope (remove #12 and #14), release 3 is unlikely to be able to go live before EOS to Cloud. This release will need to be rescheduled to after June 2026.
- Release 4, 5 and 6 are the complex invoice jobs – they all have black out dates relating to seasonal peaks which need to be considered in a plan.
- Therefore we will be doing a complete replan of the order that jobs are released over the coming week or so.
- The key impacts of delaying releases are:
 - Project cost
 - Vendor impact

Summary of suggested changes

- Recruit a Test Lead to manage proofing.
- Implement a risk-based approach to proofing (increase efficiency and reduce time).
- Addition of a fulltime BA/SME to participate in proofing and test file creation.
- Addition of three Revenue Operations staff to assist with proofing as required.
- Document and share proofing results internally and externally in real time.
- These changes will increase time for [Out of scope] to focus on writing requirements and [Out of scope] and [Out of scope] to focus on test file preparation.
- Review the release order to limit the impact on project deadlines.
- The cost of the Test Lead, additional BA and three SME is approximately \$500k. These costs could be funded through the existing Revenue Operations budget as we anticipate operational savings which could be re-purposed.
- It is likely that the project end date will move beyond June 2026. Re-planning is underway.
- Extending the project will incur additional costs of approximately \$50k per month for ACC and (currently unknown) costs for MI.

Job volumes and black out periods

Current Release	Job	Annual volumes (000)	Black out to accommodate seasonal peak
1	#6 Client debt letters	2	
	#5 CPX PC notifications	89	February;#March;#April;#May (Release one)
2	#7 SER Infosheets	29	February;#March;#April;#May;#June;#July;#August;#September (Release two)
	#10 ER group structure notifications	21	January;#February;#March (Release two)
	#11 MyA4B notifications	79	August;#September;#October (release two)
3	#14 Provider payments notifications	197	
	#12 Client payment notifications	1,437	
	#2 Claims acceptance letters	960	
	#13 Client reimbursement notifications	5	
4	#4 BC notifications	1,266	August;#September;#October;#November
	#9 ER Quarterly Claim reports	913	
5	#1 WPC/WPS and AEP invoices	909	June;#July;#August
6	#3 CP and CPX invoices	1,344	August;#September;#October
7	#8 AEP Handback invoices	470	
	#15 Adhoc letters	1	

[Link to current planned milestones for all releases](#)

Appendix:

- Details of project team roles
- Options detail

Proposed change to project team roles

	Current [Out of Scope]	Recommendation and rationale	Future
Lead BA/ Write requirements and responding to queries about requirements and updating requirements		[Out of Scope] continues as this sets the foundation.	[Out of Scope]
Review requirements		SME knowledge is key as these documents are the foundation for all the work.	[Out of Scope]
Map requirements		Consider whether the test lead could take/ contribute to this role. Depends on the person and their skill set and more understanding of the task.	[Out of Scope] or test lead
Create test files		Add support from [Out of Scope] (or other) to speed this up, but must continue to be led by business SMEs	[Out of Scope] plus one more
Prepare for and lead proofing and collate results		Release [Out of Scope] to focus on requirements Allow time to structure the proofing approach to ensure coverage and efficiency	Senior Test Analyst/ Quality Lead (contractor)
Do proofing		Bigger team to reduce time required. The team needs to be able to work independently of [Out of Scope] and [Out of Scope] at times so that test files can continue to be created. Number of testers needed per job will depend on what other work [Out of Scope] have scheduled.	Test lead, [Out of Scope] and three more proofers [Out of Scope] when they are free
Do E2E testing		Ideally done by one of our BAU team as it replicates BAU processes. Hoping that will only take mornings during E2E testing – this will be confirmed in release one.	[Out of Scope]

Options – requirements documentation

Option	Benefit	Risks/ negative impacts	Comments/ questions	Recommended
Identify alternative BA to write last two Service Delivery requirements documents	Get requirements to Marketing Impact faster Service Delivery ownership of content Free up [Out of Scope] for other activities	Alternative BA will take significantly longer than [Out of Scope] and will require her support. (at least twice as long?) Quality and consistency of requirements will be reduced.	Team will still need to review and then collate test file to complete requirements. No obvious person to do this Have asked PART and no one is available	Yes but unlikely
Identify alternative Levy BA to share the writing of the remaining Levy related requirements documents	Get requirements to Marketing Impact faster Free up [Out of Scope] for other activities	Alternative BA will take significantly longer than [Out of Scope] and will require her support. (twice as long?) Quality and consistency of requirements to will be reduced. No one available without taking time off other parts of project	Options: [Out of Scope] – not available or would take time off proofing Team will still need to review and then collate test file to complete requirements so overall may not save time	No
Move [Out of Scope] off proofing consolidation to focus on requirements documentation	Up to two months of [Out of Scope] time released for requirements writing	Risk of missing places where requirements are wrong.	[Out of Scope] will still need to be sign off – will she be willing to do that based on a different test approach?	Yes
Identify the risky or ambiguous requirements and loop back to [Out of Scope] on those ones	Reduce [Out of Scope] time for proofing but maintain control over key areas		A good balance for [Out of Scope] if she is not leading	Yes
Find someone else to do the BAU tasks for 1 April Levy change and Guidewire to Cloud	A month or so of [Out of Scope] time for requirements	[Out of Scope] is the key mailhouse SME across projects and BAU – not likely that someone else can successfully pick this up		No
Ask [Out of Scope] to write requirements more quickly if relieved of all interruptions	Shorten time to get requirements to Marketing Impact	Under pressure requirements will missed/ make errors setting up the whole job for failure Stress on [Out of Scope]		No

Options – Test files and proofing

Option	Benefit	Comments	Recommended
Onboard and upskill additional <3> proofers from the operational team to do proofing and get through the work faster	Currently we have [Out of Scope] on test files and proofing and [Out of Scope] on proofing, so every one we add might reduce forecast proofing time by 25% (allowing for less experience)	The.	Yes
Dedicated lead for proofing to create a proofing strategy, run the proofing and consolidate the findings as we go rather than as a separate task at the end of the proofing. This could be a Senior Levy analyst or a contract Quality lead. Can also do proofing and support E2E testing if spare capacity.	Allows [Out of Scope] to focus on requirements Removes 2 to 5 days per job Provide MI with feedback more quickly, enable MI to resolve as they go.	Lead needs time to become very familiar with the requirements, confident to allocate work and support the proofing team. Expensive option as paying for contractors	Yes
Change to proofing approach in line to use a risk based proofing approach	Time needs to be allocated to do the risk based planning – prioritisation of requirements and defects.		Yes
Focus our SMEs ([Out of Scope]) on proofing the ambiguous and high risk requirements	Free up SMEs to focus on requirements review, mapping and test file creation, rather than proofing. Ensure SME expertise is focussed where the most value can be added		Yes
Onboard junior tester to complete some of the testing using a risk based approach instead of Levy SMEs	Less FTE taken out of operational teams	Expensive option as paying for contractors	No (other than test lead)

Proofing and Test file Approach Risks

The key risk of changing the proofing approach is missed requirements and errors slipping through resulting in legal, reputational, privacy and service impacts and loss of customer trust.

Risk	Mitigation
The proofers are using their SME knowledge as they proof to identify issues in the letters that might be due to missed requirements, misinterpretation of requirements and data anomalies. Without SME knowledge or this type of error is more likely to be missed	Experienced SME proofers on the high risk requirements
If someone other than [Out of Scope] consolidates proofing findings, they will have less knowledge and understanding of requirements than [Out of Scope] and therefore will take longer and be more likely to miss things.	Involve the proofing lead in requirements peer review Structured risk based approach to ensure [Out of Scope] is involved at appropriate times
We know from our first release, that new proofers miss things and are slower than our core teams.	Take time to thoroughly train and QA the new proofers during the first release (will take [Out of Scope] off requirements writing for this time) Use risk based approach to put most experienced SME proofers on the highest risk work

Mailhouse Transition Project

Steering Committee Meeting

21 August 2025. 3pm

Justice 12.02 Cricket or Teams Meeting

Prepared by [Out of scope] Project Manager

Steering Committee Members

Sonia Leow (Senior Responsible Owner)

[Out of scope] (Business Owner)

[Out of scope]

[Out of scope]

[Out of scope]

[Out of scope]

[Out of scope]

[Out of scope]

Attending: [Out of scope], Manager Privacy & Ethics & Privacy Officer



He Kaupare. He Manaaki. He Whakaora.
Prevention. Care. Recovery.

Agenda

1. Actions from previous meeting
2. Resource requests
3. Draft recommendations from proofing review
4. Workflow change requests
5. Updated release one and two timing
6. Marketing Impact costs

RELEASED UNDER THE
OFFICIAL INFORMATION ACT

1. Actions from previous meeting

	What	Who	Status
1	Provide [Out of scope] with required skill details for requirements writing	[Out of scope]	Closed
2	Check with [Out of scope] for potential resources in service delivery, pending [Out of scope] skill requirements.	[Out of scope]	Closed Included in [Out of scope] paper for [Out of scope]
3	Discuss backup support options for [Out of scope] with [Out of scope] and add to the recommendations so that [Out of scope] can include additional resourcing and recognition in paper to [Out of scope].	[Out of scope]	Closed Included in [Out of scope] paper for [Out of scope]
4	Expand the resourcing paper to [Out of scope] to include all resource requests following [Out of scope] feedback	[Out of scope]	Update to be provided today
5	Kick off review of proofing approach with [Out of scope] and [Out of scope]	[Out of scope]	Closed
6	Book a follow-up meeting next week after [Out of scope] review and conversations with [Out of scope]	[Out of scope]	Update to be provided today
7	Assess and provide a new project timeline, including job order when recommendations and proofing approach is agreed.	[Out of scope]	In progress Release one and two replan in this pack

2. Resource requests

- Verbal update from [Out of scope]

RELEASED UNDER THE
OFFICIAL INFORMATION ACT

3. Draft Proofing Review recommendations

[Out of scope] has made the following draft recommendations. These recommendations are not set in stone still need to be discussed and refined with the business team, who have a number of valid reservations that still need to be worked through.

Recommendation	What does this look like
Risk rate all business rules before proofing commences	1. Develop a customised risk framework that meets the specific risks relevant to this project – ie define likelihood and consequence in terms that make sense to the project. This would be developed in a workshop with the business. 2. Take a disciplined approach to rating each rule based on evidence eg likelihood based on factors like complexity, ambiguity, how MI have implemented it, previous rounds of proofing. This should be completed by [Out of scope] or another SME eg [Out of scope] or [Out of scope]
Reduce proofing volumes by using the risk ratings	1. Apply the risk matrix to determine: - How many examples are proofed for each rule - How many proofers check each rule - Which proofer checks which scenarios (put the most experienced proofers on the highest risk scenarios) This enables proofers to focus where the risk is and to apply their analytical skills and SME knowledge to the areas that really matter. 2. Reduce proofing volumes as proofing rounds progress, informed by the risk rating and knowledge of how the system works (rather than a complete reproof in every round of proofing). 3. Review proofers work to understand what they are missing and then provide support and training to build skills confidence and trust (will inform likelihood)
Manage defects in Jira to provide visibility and prioritisation	1. Record all defects in Jira along with their severity rating, as they are found during proofing. (Establish a template). 2. Provide visibility of defects to stakeholders using a Jira dashboard 3. Manage defects depending on the risk rating of the business rule 4. Regular triage meetings with [Out of scope] to review high severity defects and defects relating to high risk business rules Note –proofing will continue to be completed in an excel spreadsheet so Jira will not provide visibility of proofing completion
Onboard a professional senior tester to manage proofing	The tester would be involved in: • Requirements review, to help identify areas of ambiguity • Setting up proofing spreadsheet if possible • Completing proofing as appropriate based on the risk ratings • Documenting defects, rating severity and triaging with [Out of scope] SMEs. • Collating defects for Marketing Impact – we will need to determine the burden and process for converting Jira defect tickets into a Word document format for Marketing Impact as they have asked to continue with the format that [Out of scope] is using.



4. Workflow Change requests

- Six change requests are presented on the following pages for updates to the Marketing Impact workflow.
- Four of these change requests reflect the move from manual processing with incumbents to a fully automated solution with Marketing Impact. As we have moved through proofing and the end to end test planning process, we have identified several differences and risks stemming from the automation.
- Implementing these changes will result in an additional two to three week delay on the project as Marketing Impact need to redo their end to end testing in most cases.
- While these changes are specific to Release One job streams, these workflows will be replicated for all future release job streams that have the same requirements, fixing them now removes inconsistencies between similar jobs and the need for regression testing or change requests and full testing for Release One jobs.
- Marketing Impact have provided the following cost estimates to implement. Note first line (scoping the requests) has already been incurred.

Change Request	Cost to implement	Time/Effort Required **
Workflow Change Requests - review, discuss, scope and write up *	[s 9(2)(b)(ii)]	N/A (completed)
Address cleansing		6 days
Email copies in the archive file		
Client debt letter processing time		1 day
Batched run - resupplying files (Client Debt letters)		2 days
More than one data file sent		2 days
Combined processing of data files and/or suppression files		2 days
Total	\$20,340	13 days

Address Cleansing

Applies to all jobs

Context:	When post files are sent to the Mail house, they apply address cleansing to improve the quality of the addresses in the file and to reduce our postage costs. Our original requirement was that 'Address cleansing is only applied to New Zealand addresses' where the country field is 'New Zealand' We have updated the requirement to expand this rule to include where the country field is 'null'
Current state:	The incumbent suppliers remove any records where the country field is not 'New Zealand' or 'null' from the file before submitting it to the NZ Post Postal Address File (PAF) for cleansing.
Marketing impact solution:	Marketing Impact's address cleansing does not exclude any postal records and runs some 'pre formatting' changes before using the NZ Post PAF. They rely on the pre formatting and PAF to identify which addresses are overseas addresses and to exclude these from the cleanse process.
Risk scenario:	If an overseas address is close to a NZ address (street, suburb, town) and the country line is not identifiable as a known country in their pre formatting database, the address could be incorrectly cleansed to a NZ address.
Consequence	The letter could get sent to the wrong address in NZ or overseas, resulting in a privacy breach .

	Inherent risk	Marketing Impact fix
Likelihood	Possible	Rare
Consequence	Minor	Minimal
Risk	Medium	Low

Recommendation	Ask Marketing Impact to screen out addresses that do not have 'New Zealand' or 'Null' in the country field
-----------------------	--

MI Cost estimate	[s 9(2)(b)(ii)]
Summary of MI feed back	• MI strongly urge ACC to trust the IQ standardiser (NZ PAF) toolset to do the job as it is built to do for production data. MI state that current workflow configuration does not cleanse legitimate overseas records and that the issues raised during proofing relate to the made up test data. • MI believe they have provided ACC with reassurance and evidence that when using the current EMS workflow address cleansing configuration, if logical overseas address test data is used, the original record is not cleansed. • The approach ACC are asking for will require MI to develop 'bespoke' coding for ACC that is unnecessary to achieve what ACC require and MI will then have to maintain that code. • If ACC still has reservations about NZ PAF, given release one jobs have hardly any overseas addresses, MI suggest revisiting this again for any job streams with significant numbers of overseas records.

Email copies in the archive file

Applies to Guidewire and EOS jobs

Context:	For EOS and Guidewire based communications, a pdf copy of the letter/invoice that was sent to each recipient is uploaded to Guidewire/ EOS for the record and so that staff can see it for reference when responding to queries
Current state:	The pdf includes the letter, but not the email content.
Marketing impact solution:	The pdf will include the letter and the email content to give staff the full context of the communications. The pdf is created before the email is sent. The pdf shows the approved email content, it is not a copy of the actual email that was sent.
Risk scenario:	If there is a problem with the send of the email at any point, the archive file may not be a true reflection of the email the customer received e.g. content may be different or if the email is delayed for some reason then the date of the email could be different.
Consequence:	This could result in issues being raised through Channel Support Advisors (CSA's) and in complaints depending on how it is handled.

Risk rating	Inherent risk
Likelihood	Rare
Consequence	Minimal
Risk	Low

Recommendation	No change - Accept the Marketing Impact solution
-----------------------	--

Client debt letter processing time

Context:	Client debt letters are low volume (<10 records per file per day) and therefore while a file is sent to the mail house every day (when there are records to be produced), the files are batched and only processed twice a week on Tuesday and Thursday to save cost. The processing on Tuesday will include any files received Friday, Monday and Tuesday, Thursdays processing will include Wednesday and Thursday. The file is due to be sent to the mail house at 1am. However, every 2 to 3 months the file is delayed by more than 1 hour
Current state:	Western Mailing process the batch files at 10.30am on Tuesdays and Thursdays.
Marketing impact solution:	The batch of files will be processed at 2am on Tuesday and Thursday. If the file that is due on that day arrives after 2am, it will not get processed until the following processing day. Eg records in the Tuesday file will not be processed until Thursday.
Risk scenario:	When the file is late on a Tuesday or Thursday, the client debt letters for that day will be sent a couple of days late. If the wider business (outside of LSP) want to see when something was sent, they can't rely on the date the event happened in the system to determine it, they will need to contact LSP to check the files and work out when the letter was processed. This issue will also relate to the Client Reimbursement job.
Consequence	This could cause confusion to recipients and staff and increase enquiries to LSP.

	Inherent risk	Marketing Impact fix
Likelihood	Almost certain	Unlikely
Consequence	Minimal	Minimal
Risk	Medium	Low

MI Cost estimate	[s 9(2)(b)(ii)]
Summary of MI feed back	Moving the processing time impacts Marketing Impacts ability for the production team to start printing an processing manual mail, but with low volumes this can be accommodated.

Recommendation	Ask Marketing Impact to move the Client Debt processing time to 9.30am and move the no file received email to 7am to give time for the file to be submitted.
-----------------------	--

Batched run - resupplying files (Client Debt letters)

Context:	In production, each day the LSP team proof some mail house jobs and then approve the mail house to send the jobs out. After the proof file is reviewed, if an issue with the data file is identified, ACC will not approve the proofs and will supply a new data file to the mail house.
Current state:	If an issue is found with the file during proofing, LSP use a manual process to contact the mail house and resupply the file. The file is manually handled by the incumbent. Currently LSP proof the majority of Levys letters, but not Service Delivery letters.
Marketing impact solution:	The resupply of files will be automated via a self service interface and Axway. When LSP declines the proofs, they will resupply the updated file and the job will rerun without human intervention. When the job is batched (multiple days files processed in one day), Marketing Impacts solution will combine multiple files into one file. If the proofing identifies a data issue, the system will expect ACC to either 1) upload a full replacement file combining all the days in the batch, or 2) call Marketing Impact to get manual intervention so that they can stop the automation so ACC can provide only one file In the Marketing Impact solution, proofing functionality will be available for Levys and Service Delivery jobs. Proofing will only be turned on for Service Delivery jobs, including Client Debt letters for the first month or so after go live and when there are changes made to the job.
Risk scenario:	This change introduces a new manual process, that is bespoke to Client debt batched jobs. When LSP decline proofs for a batch ed job, they would need to manually recreate the batched file, or contact Marketing Impact directly. This would be a different process from all other jobs and as it will be used infrequently, it creates a risk of manual proces sing errors. Recreating a batched file requires copying and pasting of existing files content, it is very easy to make a mistake or accide ntly change data. Manual changing of files is risky and should be a last resort.
Consequence	- Inexperienced LSP staff member doesn't realise they need to resubmit the whole batch and only submits the data file impacted without advising Marketing Impact. This would result in only one file from the batch being processed and so customers in the missed files would not receive their client debt letter. - If we ask LSP to recreate the batch in a single file, when staff member create the file they could make a mistake; creating the risk of a privacy breach - Sending personal information (debt, reimbursement amounts, names, addresses) to an incorrect recipient or accidentally changing data providing incorrect information to the correct recipient e.g. changing a debt from \$100 to \$1000.

	Inherent risk	Marketing Impact fix	MI Cost estimate	[s 9(2)(b)(ii)]
Likelihood	Likely	Rare		
Consequence	Minor	Minor	Summary of MI feed back	MI solution will add a new job stream level configuration to prevent the workflow from automatically re-processing resupplied files. Resupply of a file will instead trigger an error, send an internal MI notification and prompt a conversation with ACC as to how to proceed
Risk	Medium	Low		

Recommendation	- Make it mandatory for LPS to contact Marketing Impact when the Client debt proofs fail and not submit a replacement file. Donot have a process to recreate the combined file. - Ask Marketing Impact to turn off the automation for resupplied files where the job is batched, so that the only option is tocontact Marketing Impact and LPS can not accidentally submit a single file.
-----------------------	--



More than one data file sent

Applies to all jobs except Client Reimbursement

Context:	In general, job streams are only expecting maximum of one data file (of each type) from ACC per day and the source systems are scheduled/ programmed to send only one file a day. However, there is a possibility that due to human error or a system glitch, the source system could send a second file and Axway would send it to the mail house. We are not aware of an unexpected additional file being sent in the last few years. We have instances where the ART sent a second file on purpose, and we were notified by the mail house.
Current state:	If a second file was sent to the incumbent mail house, the mail house would call LSP and ask what to do with it.
Marketing impact solution:	As the solution is automated, Marketing Impact would process the file once received, regardless of whether ACC purposely sent out the second file or not.
Risk scenario:	If a second file was sent by ACC in error and if the proofing was not turned on, the letters would go out. If proofing was turned on, proofers may not realise that a second file was sent and so the communications may still get sent as this is not the purpose of production proofing.
Consequence	Duplicate or incorrect communications may be sent out resulting in complaints, customer confusion or misinformation as well as increased postage and generation costs (depending on the size of the file e.g. peak invoicing cycle ~25K in a single file).

	Inherent risk	Marketing Impact fix
Likelihood	Rare	Rare
Consequence	Minor	Minimal
Risk	Low	Low

MI Cost estimate	[s 9(2)(b)(ii)]
Summary of MI feed back	MI can amend the workflow to trigger a Job Stream level email notification to alert if a second file is received prior to midnight and prevent any further processing of the second file. It will not, however, always be feasible to stop the original file from processing and dispatching.

Recommendation	Ask Marketing Impact to introduce an alert to job streams that are only expecting one file and to send this to both ACC and Marketing Impact if a second file is received, they should also ensure it triggers a stop to the processing of both files until further details are provided by ACC
-----------------------	---

Combined processing of data files and/or suppression files

Applies to three jobs which are not batched and require suppression files or all files if previous CR not approved

Context:	- Data files are sent to the mail house on every week day, even public holidays. Our expectation is that each file we send will be processed individually, unless ACC have asked for batching. - For some jobs LSP creates a suppression file, letting the mail house know to exclude some records in the file from processing. The mail house does not process the file until the suppression file is received. There is one suppression file per data file. In public holidays, if a suppression file is required, this will be sent the next business day and the mail house will not process the file until the suppression file is received (where a suppression file is part of the process).
Current state:	- Incumbant suppliers process every file separately. - The LSP team send the individual suppression files for each public holiday on the first business day and the mail house processes each days files separately matching them with the correctly dated suppression file.
Marketing impact solution:	- Marketing Impact's solution combines all the files available for processing (during public holidays, this could be 2+ days of files) into one file. If a second file was received (ie previous slide solution not implemented) for a job without a suppression list, prior to scheduled file processing beginning these will also be combined into one file. - As soon as one suppression file is received, the file will be processed. LSP would need to send one suppression file combining all days into one file. This would also apply if we sent an additional file (see previous page)
Risk scenario:	- Batching files makes it more difficult and time consuming for LSP to manage reconciliation (daily task) and issue investigation and adds to the workload. When proofing only a small section of letters are reviewed, proofing is to ensure that the file contents are correct in the proofs and that they match what our source systems show. If there was an issue with a specific file it is less likely it will be identified and if identified more difficult to unpack. - This change introduces a new manual process, that is bespoke to public holidays where suppression is turned on. The LSP team will need to create one shared suppression file in these cases, this creates a risk of a manual error, they might forget and submit multiple suppression files resulting in letters not being suppressed.
Consequences	- Issues are less likely to be identified in proofing when files are combined, leading to incorrect, misleading, confusing or poorly displayed letters (e.g. logo missing or all dates are wrong). Adds pressure on LSP team after a public holiday (already a high stress time). - If LSP team accidentally does not create a shared suppression file, letters could be sent to recipients when they should have been suppressed, this means incorrect letters could be sent.

	Inherent risk	Marketing Impact fix
Likelihood	Likely	Rare
Consequence	Minor	Minimal
Risk	Medium	Low

MI Cost estimate	[s 9(2)(b)(ii)]
Summary of MI feed back	MI can reconfigure, at a job stream level, the current combining of a data file received on a public holiday with a data file received the next business day so that files remain separate / as separate production runs. However the solution will require manual intervention by Marketing Impact after each public holiday.

Recommendation	Ask Marketing Impact to update their workflow so that it processes each file individually and suppression lists are processed with the data file of the same date (noting that resupplied files are handled differently).
-----------------------	---



5. Release One and Two timing

- We have completed a high level replan of release one and two with Marketing Impact. The following factors have impacted the timeline:
 - Delay in signing off release one proofs (Round 3 proofing for CPX PC is has not yet started, pending decision on address cleansing).
 - Impact of security testing – we were initially told that is was possible to complete security testing and end to end testing in parallel, however, now that the detail of the testing is available, this is not possible and the Marketing Impact environment can not be used for E2E testing while security testing is in play (until 28th August)
 - Time allowed to implement any approved workflow changes and for Marketing Impact to then redo their functional testing. Potentially also implement changes resulting from Security testing.
 - Marketing Impact project and test lead is away for 2.5 weeks and during this time we cant do testing. Marketing Impact have an ISO Audit and during that week we also can not do E2E testing. This blocks out a 3.5 week period in September. The plan had ACC doing release 2 proofing during this time, but this is now delayed.
 - Complexity of the SERInfo sheets job – Marketing Impact hoped to get this job to ACC earlier to allow for longer proofing time, the complexity of the job and other delays means that this is not possible.
 - Release 2 proofing can not be at the same time as release 1 E2E testing as this is the first round of testing with the workflow. (note this constraint will not necessarily apply to future releases).
 - Christmas change freeze and summer holidays
- The upside of the delays resulting from Marketing Impact leave, is it provides ACC with the time to replan our proofing approach, replan our future release order and get back on the front foot with requirements documentation.

Milestone target dates	Release one		Release two	
	Current plan	Revised target date	Current plan	Revised target date
Proofing complete	21 st July 2025	8 th September 2025	10 th October 2025	Christmas 2025 (earlier if proofing is faster)
End to end testing complete	29 th August 2025	7 th November 2025	15 th November 2025	13 th February 2026
Go live	15 th September 2025	24 th November 2025 (potentially two weeks earlier if no workflow changes)	1 st December 2025	Late Feb/Early March 2026 (depending on how long proofing takes)



6. Marketing Impact costs

The complexities being faced in the project are coming through in increases Marketing Impact costs.

We have been notified of two areas where the time required has exceeded what was allowed for in the contract. One is a formal change request and the other a heads up of a change request to come.

SOW28 Project Management costs – Change Request

The SOW for project management was based on 460 hours over the 7 releases / 14 months (May 2025 – June 2026) was calculated on approx. 33 hours per month. The SOW states that if there is a higher project management burden on Marketing Impact, then project management charges will increase accordingly.

Marketing Impact are requesting approval to include the project management overhead from 33 hours a month to 50 hours a month. The additional project management time is coming from a higher than expected number of queries, meetings and email discussions from ACC and the need for replanning.

Change requested

Increase the project management charge from 33 hours to 50 hours per month effective from 1 August, with a review in three months time. [s 9(2)(b)(ii)]

[REDACTED]

[REDACTED]

SER Info Sheets build – Notification of expected variation

We have received a heads up from Marketing Impact that the document composition for the 07_SERINFO job stream is far more complicated and difficult than expected. This relates to the complexity of the data, the business rules and challenges with creating visuals.

Marketing Impact have not confirmed how much additional work in total will be required, but note that they have used all of the allocated 80 hours and are only 50-60% of the way through what is required to produce meaningful proof output.

Appendix:

RELEASED UNDER THE
OFFICIAL INFORMATION ACT



He Kaupare. He Manaaki. He Whakaora.
Prevention. Care. Recovery.

Minutes

Meeting: Mailhouse Transition project steering committee

Date: 21 August 2025

Time: 3pm to 4pm

Attendees	
[Out of scope] (SRO),	Head of Finance
[Out of scope] (Business Owner)	Manager Treasury & Revenue Operations
[Out of scope]	Head of Enterprise Procurement
[Out of scope]	Manager DCE Office
[Out of scope]	Manager Client Administration
[Out of scope]	Team Manager, Levy Systems and Processes
[Out of scope]	Levy Systems and Operations Manager

Guest: [Out of scope], Manager Privacy & Ethics & Privacy Officer

Apologies: None

[Link to agenda and pack](#)

Agenda items and discussion	
1.	Actions from previous meeting [Out of scope] opened the meeting and introduced [Out of scope] who is attending due to the privacy risks raised by the team in the change requests on the agenda. [Out of scope] gave a brief update on the actions.
2.	Resource requests [Out of scope] gave an update on his resource request to [Out of scope] and said he is planning on progressing with the majority of proposals discussed at the prior meeting. - This includes a fixed term test lead to manage the proofing process, temporary additional resources from Revenue Operations to assist in the proofing, a fixed term BA to help targeted delivery of the Service Delivery requirements and extending some existing secondments that touch the mailhouse. [Out of scope] noted that the cost of these resources should be able to be met by existing funding within Revenue Operations for this financial year. [Out of scope] noted that we are starting to look at the next financial year now so [Out of scope] should make sure the project is covered. [Out of scope] commented that as the acting Head of Finance, she fully endorses the approach being taken for resourcing.
3.	Draft recommendations from proofing review [Out of scope] said that [Out of scope] had held two meetings with [Out of scope] and shared his draft recommendations with her. [Out of scope] noted that these are draft recommendations that still need to be refined, as there may be points that are not workable in reality. [Out of scope] talked through the key points in the recommendations as outlined in the pack.



- [Out of scope] noted that [Out of scope] has already gone back with some feedback for [Out of scope] and they're having a good conversation. He said getting [Out of scope] involved has been a really positive step for the project. There is still a bit of work to do there in terms of what will work and meeting in the middle as [Out of scope] has the technical knowledge and needs to remain involved.
 - [Out of scope] requested that the risk framework that is developed is brought back to the steering committee.
 - [Out of scope] said if any material changes were made to the recommendation, she would bring that back to the steering committee
- Endorsement:
- [Out of scope] endorsed the direction of the recommendation to provide the backing of the steering committee to the work.

4.

Workflow change requests

- [Out of scope] noted that we are learning that its important to be clear what we don't want as well as what we do want, as the way Marketing Impact have delivered the workflow is different from what was expected.
- [Out of scope] talked through each change request. Key discussion points and decision are recorded below.
- [Out of scope] asked if Marketing Impact was likely to request more change requests, and [Out of scope] clarified that these change requests are from ACC not from MI. [Out of scope] noted that MI does not require these change requests.

Change request	Discussion points	Decision
Address cleansing	• [Out of scope] noted that this risk needs to be run past Privacy • [Out of scope] asked if Levys send much by post to overseas addresses as Service Delivery prefers to use email for overseas. [Out of scope] replied that there are minimal overseas addresses in release one jobs. • [Out of scope] said that she wholeheartedly endorsed moving everything to email. • [Out of scope] asked how we would know if an address was cleansed incorrectly. [Out of scope] replied through complaints. • [Out of scope] and [Out of scope] discussed that there has been one address cleansing error in the last year. [Out of scope] said Privacy were not very worried about this risk and it would be low to manage. • [Out of scope] noted that one of ACCs architectural principles is not to customise code where possible, so should we consider this. • [Out of scope] asked whether MI use this approach for their other customers to send overseas mail and [Out of scope] said this is the same process for all their customers.	Declined the change request. [Out of scope] to take an action to revisit this risk with the Privacy team for future releases considering the letter/ invoice content and volume of overseas addresses in the job. [Out of scope] to discuss any opportunities to investigate switching overseas addresses to email with Levy team.
Email copies in the archive file	• No discussion points raised	Endorsed recommendation to accept the risk and not request a change
Client debt letter processing time	• [Out of scope] noted that from a Service Delivery point of view she is not concerned as clients are generally told that it will be sent out in due course. • [Out of scope] noted that if we don't do this it will make it harder for [Out of scope] team. [Out of scope] agreed that it would result in more questions to the team and he would prefer it to go ahead. But with more resource in the team it be less of an issue. • [Out of scope] said we would come back to this decision.	A decision was not reached in the meeting, however subsequently the CR was declined via email. Email approvals are stored here



Batched run - resupplying files (Client Debt letters)	• [Out of scope] said he was comfortable not to do this one, but queried whether contact with Marketing Impact would be managed by email or phone. [Out of scope] said we would need to confirm this, but that currently most communication is via email.	Declined the change request. [Out of scope] to confirm the process for communicating with Marketing Impact to [Out of scope]
More than one data file sent	• [Out of scope] noted that this is an extremely rare event. • [Out of scope] commented it was up to ACC to manage this	Declined the change request.
Combined processing of data files and/or suppression files	• [Out of scope] commented that we could remove the manual risk from our side, but then the manual risk would be on the Marketing Impact side. • [Out of scope] asked if it could be fixed with a change to business process. • [Out of scope] said this was the one he was most concerned about as it is more likely than the others and that he believed errors in this space had happened before. It came down to well documented processes being followed to the letter. • [Out of scope] asked if we were confident that a business process could be set up for this and [Out of scope] said he was confident in his team but that they would need some time and some other team members to work on it.	The committee initially declined the change request However, following the meeting, further discussions were held about this CR with [Out of scope] about the impact on his team, and a request to change the recommendation to Approve was endorsed via email. Email approvals are stored here

5. **Updated release one and two timing**
- [Out of scope] noted that there are a number of different factors that have driven the delays as outlined in the pack. A plus side is it creates time for us to work through the proofing review and resourcing.
 - [Out of scope] asked what the overall impact was and [Out of scope] said she doesn't know yet but that we can see release two is 2 to 3 months late so the overall impact is at least that but likely to be a lot more. We will definitely push into next financial year.
 - [Out of scope] noted that, even with all of these proposals that we're looking in terms of resourcing, reviewing the systems and the processes, there would be delays but without the changes, it would be considerably longer and riskier with complex releases still to come.
 - [Out of scope] asked about release 3 jobs and [Out of scope] said that we could not get it in before EOS to Cloud, and so she will be replanning to get some other high volume jobs in as soon as possible.
 - [Out of scope] noted that timing will also be impacted by other priority work for the 2026 Levy consultation changes and they are working to get really clear on the touchpoints.

6. **Marketing Impact costs**
- Marketing impact cost increases for project management and the SER Info sheet job were presented.
 - [Out of scope] said that he hoped with the planned changes, the Marketing Impact project management charge could come back after three months.
 - [Out of scope] noted that [Out of scope] and [Out of scope] had a good discussion with Marketing Impact about the delays this week and Marketing Impact they are now realising how complex the work is.
- Decision:
- The steering committee approved the project management change request for three months



Action points from this meeting

	What	Who	Status
1	Share the resourcing paper with the Steering Committee	[Out of scope]	Open
2	Make sure mail house transition is included in finances for next financial year	[Out of scope]	Open
3	Bring the proofing risk framework and any material changes to the proofing recommendations to the steering committee	[Out of scope]	Open
4	Revisit address cleansing risk with the Privacy team for future releases considering the content and volume of overseas addresses.	[Out of scope]	Open
5	Discuss options for investigating switching overseas addresses to email with Levy team.	[Out of scope]	Open
6	Confirm the operational process for communicating with Marketing Impact and discuss with [Out of scope]	[Out of scope]	Open

Open actions from Previous meetings

Meeting date	What	Who	Status	Updates
13/6	Assess and provide a new project timeline, including job order when recommendations and proofing approach is agreed.	[Out of scope]	In progress	21/8 – updated timelines for R1 and R2 presented to the committee.