

Issue to be addressed	Key Development Activity	Timetable
LGPS Pensions Administration	Review Administration Team staffing levels and structure	Under ongoing review
	Review Processes and Procedures (I Connect) (new SCC Finance System)	Achieved with ongoing review
	Develop new working Practices (Third Party Payroll Providers)	Partially Achieved with ongoing review
	Compliance with new General Data Protection Legislation (GDPR)	Ongoing to May 2018
	Finalise Year end data	Achieved
	Issue Active and Deferred Annual Benefit Statements	Achieved
	Record Keeping Data Integrity Checks	Ongoing to March 2019
	Introduce employer asset tracking model (HEAT)	Partially achieved with further input required
	Revise HMRC maximum allowance process	Achieved
Fire Pensions Administration	Train additional Support Staff	Partially Achieved
	Explore providing administration to additional Fire Authorities	NB. Service terminated with effect from June 2018
	Issue Active and Deferred Annual Benefit Statements	
Pensions Administration System	Implement Pension Payroll Phase 3	Deferred as update not yet available from Heywoods
	Implement I Connect Phase 1 Staffordshire County Council	Ongoing
	Implement I connect Phase 2 Large Employers	Partly achieved and ongoing
	GAD Transactional data project	Achieved
Reconciliation – Contracting Out	Phase 1 Finalise Deferred and Pension members	Ongoing
	Finalise under/overpaid pensioner members	Ongoing
	Phase 2 Active Members commence reconciliation	Ongoing
Governance	To ensure that the Pension Board members have the appropriate skills and knowledge and are able to demonstrate their level of	Ongoing

Issue to be addressed	Key Development Activity	Timetable
	understanding	
	To ensure that the Committee members have the appropriate skills and knowledge and are able to demonstrate their level of understanding	Ongoing
	Conduct CIPFA skills gap analysis	Achieved
	Appoint Actuarial Adviser to the Fund	Achieved
Communications	Review website content and structure	Ongoing
	Revise Employer Administration manual	A review of the format of this document is ongoing
	Finalise and communicate administration strategy	Ongoing
The Pensions Regulator	The Public Service Scheme Code of Practice and Public Service Regulatory Strategy – Review compliance	Achieved
	Comply with Record Keeping Regulations	Ongoing
	Monitor and report employer performance	Achieved
Additional Voluntary Contribution Providers	Embed new processes for Scottish Widows	Achieved
	Implement changes to investment routes for Standard Life	Achieved
Pension Fund Investment	Review Strategic Asset Allocation in the context of the Investment Structure being offered by LGPS Central	Achieved
	Tender and appoint Performance Measurer	Achieved
	Continue to respond to and develop detailed pooling proposals with LGPS Central	Achieved
	Tender and appoint Independent Investment Advisor	Deferred