

Area of Service	Key Development Activity	Progress
<b>LGPS Pensions Administration</b>	Develop new working Practices with Third Party Payroll Providers including the introduction of i-Connect (see below)	Good progress made but work ongoing as new providers emerge
	Full implementation of Hymans Employer Asset Tracker (HEAT) including mechanism for Ill-health self insurance	Achieved
	Improve quality of data prior to 31 March 2019 Valuation	Achieved (albeit data quality improvement will always be of ongoing benefit)
	Ensure full compliance with new General Data Protection Legislation (GDPR)	Achieved
	Demonstrate a general improvement in KPI's	Improvement in some areas with ongoing challenges in others
<b>Pensions Administration System</b>	Implement i-Connect with a range of small / larger Employers to achieve an overall target of 50% of Active Fund Membership	On target to achieve
	Government Actuaries Department transactional data project	Achieved
<b>Contracting Out Reconciliation</b>	Phase 1 Finalise enquiries with HMRC for Deferred and Pension Members	Achieved
	Phase 2 Finalise enquiries with HMRC for Active Members	Achieved
	Finalise under/overpaid pensioner members	Ongoing, pending responses from HMRC
<b>Governance</b>	To develop a Training Plan for Pensions Committee Members focusing on any collective knowledge gaps identified from the Training Needs Analysis (TNA)	Achieved – annual review due Q119
	Review published policies e.g Governance Policy	Register of policies produced. Several policies reviewed with plan in

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		place to review others during 2019/20
	Develop Covenant Monitoring Process	Outstanding. Deferred to 2019/20
<b>Communications – Scheme Members</b>	Review website content and structure including Member Self Service / My Pension	Significant progress made but due to enormity of task, work will continue into 2019/20
<b>Communications - Employers</b>	Develop Employer Administration policies / guides / practices and promote such to relevant Employers	Significant progress made. Review in conjunction with website development, with work continuing into 2019/20
	Run Employer Practitioner Workshop(s) e.g Breaches, Ill-health retirement, IDRPs and produced focussed Newsletters	Achieved with Training Workshop, Employer Focus Newsletters and new Employer Peer Group established. Ongoing development in 2019/20.
<b>Pension Fund Investment</b>	Implement new Governance Arrangements in relation to LGPS Central to include meetings and reporting to / from the Shareholder Forum, the Joint Committee and the Practitioners Advisory Forum to Pensions Committee and Pensions Panel	Achieved
	Continue to review SPF Strategic Asset Allocation in the context of the Investment Offering of LGPS Central	Ongoing. Meetings with Investment Advisors and LGPS Central as required.
	Monitor process, reconcile data and report performance impact following asset transitions into LGPS Central e.g Global Equities	Global Equity Transition took place in February 2019. Post transition

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		analysis and reconciliations to be completed for 31 March 2019 accounts.
Area of Service	Resource Intensive – Business as Usual Activity	Period
<b>LGPS Pensions Administration</b>	Review Pensions Services staffing levels and structure	1 April – 30 September
	Finalise Year end data	1 April - 30 July
	Issue Active Annual Benefit Statements	1 July – 31 August
	Issue Deferred Annual Benefit Statements	1 May – 30 June
	Record Keeping Data Integrity Checks (pre-2019 Valuation)	1 April – 31 March
	Management of JLT backlog project and response to resulting queries	1 April - 31 January
<b>The Pensions Regulator (tPR)</b>	Continually review compliance with The Public Service Scheme Code of Practice and Public Service Regulatory Strategy in relation to Disclosure of Data	1 April – 31 March
	Maintain and review Breaches Log and improve reporting to tPR	1 April - 31 March