

Area of Service	Key Development Activity	Timetable
<b>LGPS Pensions Administration</b>	2019 Actuarial Valuation – work with Actuary and Employers to ensure all valuation work is carried out in a timely, informative and efficient way	31 December 2019
	Undertake a Mortality / Living as Stated / Tracing Exercise prior to issue of 2020 Deferred Annual Benefit Statements	31 March 2020
	Continue to develop new working practices with Third Party Payroll Providers following the introduction of i-Connect	31 March 2020
	Demonstrate a general improvement in KPI's	31 March 2020
<b>Pensions Administration System</b>	Continue to implement i-Connect with a range of smaller / larger Employers to achieve an overall target as close to 100% of Active Fund Membership data being submitted monthly	31 March 2020
	Review task design in Altair	31 March 2020
	Review use of interactive dashboard in Altair	31 March 2020
<b>Contracting Out Reconciliation</b>	Finalise under/overpaid pensioner members following responses to enquiries with HMRC	31 March 2020
<b>Governance</b>	Run appointment process for 4 Members of the Local Pensions Board	30 June 2019
	Continue to review published policies e.g. Administration Policy	30 September 2019
	Review need for and develop Covenant Monitoring Process	31 December 2019
	Review of Funding Strategy Statement following Actuarial Valuation and consultation with Employers	31 December 2019
<b>Communications – Scheme Members</b>	Promote the use of Member Self Service / My Pension (with the aim of issuing all Annual Benefit Statements electronically in 2021)	31 March 2020 and beyond
	Continue to review Website content	31 March 2020
<b>Communications</b>	Further develop and run Employer Practitioner Workshop(s) e.g	30 June 2019

Area of Service	Key Development Activity	Timetable
<b>- Employers</b>	Breaches, Ill-health retirement, IDRPs	
	Further develop the role of the Employer Focus Peer Group and the Employer Focus Newsletters	30 September 2019
	Further develop Employer Administration policies / guides / practices and promote such to relevant Employers	31 March 2020
<b>Pension Fund Investment</b>	Review of Strategic Asset Allocation (SAA) in conjunction with 2019 Actuarial Valuation and the Investment Offering of LGPS Central Ltd	31 December 2019
	Review of the Investment Strategy Statement following the SAA review	31 March 2020
	Continue to monitor processes, reconcile data and report performance impact following asset transitions into LGPS Central e.g. Corporate Bonds	31 March 2020 (as required)
Area of Service	Resource Intensive – Business as Usual Activity	Period
<b>LGPS Pensions Administration</b>	Management of JLT backlog project and continued response to resulting queries	1 April - 30 June
	Review Pensions Services staffing levels and structure	1 April – 30 September
	Finalise Year end data	1 April - 30 July
	Issue Deferred Annual Benefit Statements	1 May – 30 June
	Issue Active Annual Benefit Statements	1 July – 31 August
	Record Keeping Data Integrity Checks (pre-2019 /post 2019 Valuation)	1 April – 31 March
	Continue to improve quality of data generally across the Scheme	1 April – 31 March
	Assess the impact of any Regulatory Changes and communicate such to all interested parties and stakeholders	1 April – 31 March
<b>The Pensions Regulator</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

Area of Service	Key Development Activity	Timetable
	Improve common and conditional data scores	1 April – 31 March
	Maintain and review Breaches Log and improve reporting to tPR	1 April - 31 March