

Area of Service	Key Development Activity	Timetable
LGPS Pensions Administration	Develop new working Practices with Third Party Payroll Providers including the introduction of i-Connect (see below)	31 March 2019
	Full implementation of Hymans Employer Asset Tracker (HEAT) including mechanism for Ill-health self insurance	30 September 2018
	Improve quality of data prior to 31 March 2019 Valuation	31 March 2019
	Ensure full compliance with new General Data Protection Legislation (GDPR)	31 March 2019
	Demonstrate a general improvement in KPI's	31 March 2019
Pensions Administration System	Implement i-Connect with a range of small / larger Employers to achieve an overall target of 50% of Active Fund Membership	31 March 2019
	Government Actuaries Department transactional data project	31 July 2018
Contracting Out Reconciliation	Phase 1 Finalise enquiries with HMRC for Deferred and Pension Members	30 September 2018
	Phase 2 Finalise enquiries with HMRC for Active Members	31 October 2018
	Finalise under/overpaid pensioner members	31 March 2019
Governance	To develop a Training Plan for Pensions Committee Members focusing on any collective knowledge gaps identified from the Training Needs Analysis (TNA)	30 June 2018
	Review published policies e.g Governance Policy	30 September 2018
	Develop Covenant Monitoring Process	31 March 2019
Communications – Scheme Members	Review website content and structure including Member Self Service / My Pension	31 March 2019
Communications - Employers	Develop Employer Administration policies / guides / practices and promote such to relevant Employers	31 March 2019
	Run Employer Practitioner Workshop(s) e.g Breaches, Ill-health retirement, IDRPs and produced focussed Newsletters	30 June 2018

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Pension Fund Investment	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	30 September 2018
	Continue to review SPF Strategic Asset Allocation in the context of the Investment Offering of LGPS Central	31 March 2018 (as required)
	Monitor process, reconcile data and report performance impact following asset transitions into LGPS Central e.g Global Equities	31 March 2019 (as required)
Area of Service	Resource Intensive – Business as Usual Activity	Period
LGPS Pensions Administration	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
The Pensions Regulator	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