

Business Plan 2018–2021

	2018/19	2019/20	2020/21
Pension Administration			
Valuation- collection of data		Apr to Jul	
Valuation results to employers		Sept to Mar	
Auto-Enrolment	Apr to Mar	Apr to Mar	Apr to Mar
Guaranteed Minimum Pension Review	Apr to Oct		
Member data quality review	Sept-Dec		
Monthly submission of data from employers (i connect)	Apr to Mar	Apr to Mar	Apr to Mar
I –connect project – Self service	Apr-Mar		
Communications			
Member Self-service	Apr to Mar		
Annual Benefits Statements	Jul to Aug	Jul to Aug	Jul to Aug
Communication Policy review		Aug to Dec	
Member newsletters	Half yearly	Half yearly	Half yearly
Employer meeting		Dec	
Governance			
Pension Fund Accounts	Apr to May	Apr to May	Apr to May
Approve Final Pension Annual report	July	July	July
Review Risk Register	Sept	May	July
Investment strategy statement	January	January	January
Setting & reviewing members' training programme	July to Jan	July	May
ESG review	July- Mar		
LAPFF	Ongoing	Ongoing	ongoing
Investment consultant service re-tender	Dec		
Actuary service re-tender			June to Oct
Governance CIPFA Review (including risk, responsible investor and Pooling)	Oct	Oct	Oct
Pension Regulators KPI's	Nov	Nov	Nov
Investments			
Asset allocation review			Nov to Mar
Investment strategy statement	On-going	On-going	On-going
Qualitative review of asset allocation	Nov		
Investment performance review	Quarterly	Quarterly	Quarterly
Investment Pooling	Apr to Mar	Ongoing	Ongoing
Funding			
Triennial valuation		July-Dec	
Fund maturity and liabilities profiling and monitoring	March	March	