

Operational Plan: Projects 27 Oct 2022 NOTES: none	KRA	Aspiration	Lead	Started	Oct 22	Nov 22	Dec 22	Jan 23	Feb 23	Mar 23	Apr 23	May 23	Jun 23	Jul 23	Aug 23	Sep 23	Oct 23	Nov 23	Dec 23	Comments
11 LGPSC budget	A/C	1	RW		Cttee		Cttee			Cttee			Cttee				Cttee		Cttee	√ to date and scheduled
12 Annual Report & Accounts / associated docs (30 09 22)	A/C	2	RW		Cttee								Cttee		signed off	Publish	Cttee			2022 being audited
15 ONS Inc / Expend return	A/C	1	RW		¼ rtn			¼ rtn			¼ rtn			¼ rtn			¼ rtn			√ to date and scheduled
16/17 DLUHC SF3 LGPS Funds account (31 08 23)	A/C	1	RW													Annual				√2022
18 TPR Annual return /survey	A/C	1	NW			Annual				Survey								Annual		√2022 survey and on schedule
19 CEM investment benchmarking (31 07 23)	A/C	1	RW											Annual						√2022
2 GMP equalisation	Admin	7	SH	TBD																awaiting guidance NB non-club TVouts 1990 to 1997 in scope
4 Valuation / FSS / pots / admis term etc policies	Admin	7	RW		Cttee		Cttee			Cttee			Cttee				Cttee		Cttee	2022 on schedule
32 Reprocure pension admin system (30 04 2024)	Admin	4	NW	May-20																Staffs approached and tender docs being built
10 Pension Administration Strategy review (01 04 23)	Admin	10	CF						consult	Cttee	publish									√2022
13 Review data quality	Admin	4	NW		Aq Hey results														Aq Hey results	2022 on schedule
25 Revalue CARE accounts (30 04 2023)	Admin	4	SH								System config.									√2022
26 Provide FRS info	Admin	7	AL				admit bods			Sch				Coll	Ac				admit bods	√ to date and scheduled
3 Branding and digital strategy (MSS)	Engage	5	CF	Oct-18																awaiting resource from restructure
20 Monitor employer covenants / pots / conts	Engage	10	RW		Cttee		Cttee	ask ers		Cttee	reset erconts		Cttee				Cttee		Cttee	Pfaroe in place and Bond requirements being updated
21 Deferred annual benefit statements (31 08 23)	Engage	9	CF										Annual	Q manag						√2022
22 Employee annual benefit statements (31 08 23)	Engage	9	CF						Y/End						Annual	Q manag				√2022
23 Pensioner P60s (30 04 23)	Engage	3	SH									Annual	Q manag							√2022
24 Payslips reflecting pension increase (30 04 23)	Engage	3	SH								Annual									√2022
27 Pension Savings Statements (06 10 23)	Engage	3	NW		Annual												Annual			√2022
29 Pensioner newsletter / life cert (30 11 23)	Engage	9	CF			Annual												Annual		√2022
28 /30 Good Governance incl TPR	Gov Staff	11	RW	TBD	Cttee		Cttee			Cttee			Cttee				Cttee		Cttee	new pensions admin structure went live on 1 Nov
33 McCloud: data collection; er rates; and calcs	Admin	3	NW	Aug-20	Cttee		Cttee			Cttee			Cttee				Cttee		Cttee	we may have to help part time teachers achieve the remedy
5/6 Review of Asset Allocation / ISS (31 05 23)	Inv	14	RW		Cttee	Sub	Cttee			Cttee			Cttee Sub			Sub	Cttee	Sub	Cttee	√2022
9 Increase assets managed by LGPS Central Limited	Inv	14	RW	Feb-19	Cttee		Cttee			Cttee			Cttee Sub				Cttee		Cttee	looking into infrastructure / private debt / sustainable equity
34 Progress the Fund's RI journey	Inv	14	RW	Jan 20	Cttee		Cttee			Cttee			Cttee				Cttee		Cttee	online pensioner questionnaire live
35 Pensions Dashboards (2024)	Admin	7	TBD	Feb 22	Cttee		Cttee			Cttee			Cttee				Cttee		Cttee	attended Heywood workshop
37 Reprocurements other than pensions admin system										Legal				CFF Docmai			Mercer			√ PEL (project 36)