

Summary of Aims, Objectives and Actions

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
Aim 1 – Promote membership of the Fund					
1. Promote membership of the Fund to new and existing employers and members	Promote membership of the Fund to existing employers	Principal Pensions Manager	March 2025	Within existing resources	Relative increase in Fund membership in the longer term
	Promote membership of the Fund to prospective new employers	Principal Pensions Manager	March 2025	Within existing resources	Relative increase in Fund membership in the longer term
	Promote membership of the Fund to existing members	Principal Pensions Manager	March 2025	Within existing resources	Relative increase in Fund membership in the longer term
	Promote membership of the Fund to prospective new members	Principal Pensions Manager	March 2025	Within existing resources	Relative increase in Fund membership in the longer term
	Take a more customer-focused approach to provide members and employers with confidence in the Fund and the Scheme	Principal Pensions Manager	March 2025	Within existing resources. To link in with communication strategy	Good customer satisfaction scores

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
	Monitor the position with Fair Deal in the LGPS and implement changes as appropriate	Principal Governance and Funding Manager	March 2025	Within existing resources	Successful implementation of changes
Aim 2 – Keep contributions as low and as stable as possible through effective management of the Fund					
2. The Fund has an appropriate Funding Strategy	Review the funding strategy to ensure that it continues to target solvency whilst managing the cost of the Scheme for employers.	Head of Pensions/ Principal Governance and Funding Manager	March 2025	Within existing resources	Funding strategy at Fund and employer level remains appropriate
	Make preparations for the 2025 valuation.	Head of Pensions/ Principal Governance and Funding Manager	March 2025	Within existing resources	Prepare an action plan and liaise with stakeholders where appropriate.
	Monitor cashflow at Fund level and employer level	Head of Pensions	March 2025	Within existing resources	Funding strategy at Fund and employer level remains appropriate. Investment strategy remains appropriate. Fund level cashflow is managed correctly.
	Use the Aon Risk Analyzer system to monitor estimated Fund level movements in the funding level and reporting the results to the Pensions Committee and employers	Principal Governance and Funding Manager	March 2025	Within existing resources based on information provided by Aon	Awareness of the position of the Funding level. Quarterly update to Committee

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
	Introduce new employers into the Fund	Principal Governance and Funding Manager	March 2025	Within existing resources	Arrangements in place by agreed start date for each employer
	Manage employer withdrawals from the Fund and ensure that liabilities are met	Principal Governance and Funding Manager	March 2025	Within existing resources	Liabilities to the Fund are met
	Monitor the position on employer covenant	Principal Governance and Funding Manager	March 2025	Within existing resources	Employers pay an appropriate contribution rate relative to their covenant position
	Maintain the employer database to ensure that it is held in a format capable of being transmitted to the Actuary when required	Principal Governance and Funding Manager	March 2025	Within existing resources	Database meets the requirements of Aon
	Monitor the position on the re-classification of colleges and the Government potentially offering a guarantee.	Principal Governance and Funding Manager	March 2025	Within existing resources	An appropriate response is made to changes introduced
3. Ensure that the Fund has an appropriate strategic benchmark and investment management structure	Continue to implement the outcome of the 2022 review of the investment strategy	Principal Investment Manager	March 2025	Within existing resources	The Fund is appropriately invested in light of its liabilities and opportunities in investment markets
	Consider the transition of assets to Border to Coast, where appropriate	Head of Pensions/Principal Investment Manager	March 2025	Within existing resources	

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
	Review the Investment Strategy Statement	Principal Investment Manager	December 2024	Within existing resources	
	Consider enhancements to the management structure and individual mandates	Principal Investment Manager	March 2025	Within existing resources	
	Monitor the performance of all managers and custodians, including Border to Coast	Principal Investment Manager	March 2025	Within existing resources	
	Keep under review the approach to local investments, including the development of a more formalised approach to facilitate work between the local authorities in the region and the Fund's investment managers	Principal Investment Manager	March 2025	Within existing resources	
	Ensure fees payable on alternative investments are justified by net returns	Principal Investment Manager	March 2025	Within existing resources	
	Maintain financial control over all portfolios on a monthly cycle	Principal Investment Manager	March 2025	Within existing resources	

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
	Manage the Fund level cashflow	Principal Investment Manager	March 2025	Within existing resources	
4. Ensure other areas related to the investment of the Fund operate efficiently and effectively	Monitor the position on Fund level tactical asset allocation	Principal Investment Manager	March 2025	Within existing resources	Control of investment related risk and costs
	Monitor custody arrangements	Principal Investment Manager	March 2025	Within existing resources	
	Review stock lending, including risk, voting and recovery of overseas tax	Principal Investment Manager	March 2025	Within existing resources	
	Monitor performance and risk management services	Principal Investment Manager	March 2025	Within existing resources	
	Undertake gross and net performance reporting	Principal Investment Manager	March 2025	Within existing resources	
	Review payment, recovery and filing obligations in relation to overseas tax	Principal Investment Manager	March 2025	Within existing resources	
	Review transaction cost monitoring and commissions paid, including the impact of MIFID II	Principal Investment Manager	March 2025	Within existing resources	

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
	Review the arrangements for class actions	Principal Governance and Funding Manager	March 2025	Within existing resources	
	Renew the property insurance policy cover. This needs to be renewed annually.	Principal Investment Manager/Principal Governance and Funding Manager	March 2025	Within existing resources	
	Review the property valuation contract. There is currently no end date on the contract.	Principal Investment Manager/Principal Governance and Funding Manager	March 2025	Within existing resources	
	Review the property managing agents' contract. The end date of the current contract is April 2024	Principal Investment Manager/Principal Governance and Funding Manager	March 2025	Within existing resources	
5. Examine ways of providing employers, at their request and at their own risk and cost, with an investment strategy that may be more tailored to their individual liabilities	Monitor the position on employer-specific investment strategies and respond to any employer requests	Principal Governance and Funding Manager	March 2025	Within existing resources	Improved control of risk for employers

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
6. Implement the Government's initiative on the pooling of investments	Work with other members of Border to Coast and continue to develop appropriate monitoring arrangements	Head of Pensions	March 2025	Within existing resources	Delivery of an appropriate pooling proposal in compliance with the Government's requirements, which delivers long-term savings to the Fund
	Monitor the position on asset pooling, particularly the guidance following the consultation exercise and its impact, if any, on passive mandates.	Principal Investment Manager	March 2025	Within existing resources	
	Consider the options for investing the Fund's assets previously identified for investment in the Border to Coast external regional (ex UK) equity fund.	Principal Investment Manager	March 2025	Within existing resources	
	Work with Border to Coast and Partner Funds on the development of a multi factor, ESG focussed, product.	Principal Investment Manager	March 2025	Within existing resources	

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
	Monitor the development of a GSS bonds mandate by Border to Coast	Principal Investment Manager	March 2025	Within existing resources	
	Continue to work with Border to Coast and other partner funds to ensure other appropriate sub-funds are available for the Fund to invest in	Principal Investment Manager	March 2025	Within existing resources	
	Assist in the appointment of a transition manager, where appropriate, and have active input into any asset transfer	Principal Investment Manager	March 2025	Within existing resources	
	Monitor the ongoing costs and savings resulting from pooling	Principal Investment Manager	March 2025	Within existing resources	
Aim 3 – Invest the assets in a responsible manner					
7. Ensure the Fund has an appropriate approach to managing its approach to ESG factors and climate change risks and opportunities	Undertake an annual review of the Fund’s approach to managing ESG and RI issues. This includes an annual update of the Corporate Governance and Responsible Investment Policy	Principal Investment Manager	December 2024	Within existing resources	Annual update of the Policy agreed at Committee

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
	Actively participate in the ongoing development of the Border to Coast approach to RI and voting	Principal Investment Manager	March 2025	Within existing resources	Annual endorsement by Committee of the Border to Coast RI and voting policies
	Ensure compliance with the Stewardship Code	Principal Investment Manager	March 2025	Within existing resources	Approval of the Stewardship Code report by the FRC
	Report on the Fund's approach to RI matters and the voting record in the Annual report and Accounts	Principal Investment Manager	March 2025	Within existing resources	Details included in the Report and Accounts and these are approved by Committee
	Undertake an annual review of the Climate Change Policy, including a review of the net zero commitments	Principal Investment Manager	December 2024	Within existing resources.	Policy updated and agreed by Committee
	Undertake an annual review of the net zero roadmap and set out the progress against the actions	Principal Investment Manager	December 2024	Within existing resources.	Roadmap updated annually with suitable progress reported to Committee with key actions delivered
	Undertake an annual carbon footprint and report against the Fund's agreed carbon metrics	Principal Investment Manager	December 2024	In conjunction with the Investment Advisor	Carbon footprint presented to Committee with performance against metrics

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
	Continue to assess the role of private markets in managing climate risk	Principal Investment Manager	March 2025	Within existing resources	Policy accounts for private markets
	Continue to assess the implications of an exclusion policy if engagement is not working	Principal Investment Manager	March 2025	Within existing resources	Approach set out in the policy
	Actively engage with managers to ensure that they are appropriately addressing the climate change related risks, opportunities and threats	Principal Investment Manager	March 2025	Within existing resources	Managers can demonstrate added value from their approach to managing climate change issues
	Produce an annual report on the Taskforce for Climate Related Financial Disclosures	Principal Investment Manager	December 2024	In conjunction with the Investment Advisor	Report produced and approved by Committee
	Monitor the position on the consultation from Government on introducing a regulatory requirement to produce a TCFD report and adapt the Fund's approach to accommodate these changes.	Head of Pensions	March 2025	In conjunction with the Investment Advisor	Annual TCFD meets all future regulatory requirements
	Review suitable multi factor investment products with strong climate change credentials and take a recommendation to Committee on whether to invest.	Principal Investment Manager	March 2025	In conjunction with the Investment Advisor	Decision taken by Pensions Committee

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
	Review options for investing in “green” bonds	Principal Investment Manager	March 2025	In conjunction with the Investment Advisor	Any suitable investment is presented to Committee for consideration.
	Continue to keep the climate change scenario analysis under review	Head of Pensions	March 2025	In conjunction with the Investment Advisor	Analysis undertaken and outcome reported to Committee
Aim 4 – Work with our partners to provide high quality services to employers and members					
8. Keep the staffing structure under review and ensure it is fit for purpose	Monitor the staffing structure and establishment and implement any changes	Head of Pensions	March 2025	Within existing resources	Structure can deliver the service. Financial implications approved by Pensions Committee and budgeted for
	Develop a workforce strategy to cover issues such as recruitment, retention and succession planning.	Head of Pensions	March 2025	Within existing resources	
	Contribute to the Council’s modern workplace exercise on longer term flexible working arrangements. If appropriate for the Fund and the staff, new working arrangements will be adopted	Head of Pensions	March 2025	Working with the Council	

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
9. Continue to develop training for and communication with staff	Apply the Employee annual review process in place and deliver identified training needs	All Managers	March 2025	Within existing resources	Annual reviews undertaken for all staff
	Consider the implications for staff training resulting from the recent changes to the CIPFA Code of Practice on Knowledge and Skills	Head of Pensions/Principal Governance and Funding Manager	March 2025	Within existing resources	Staff are appropriately trained
	Review the Pensions Office Career grade	Principal Pensions Manager	March 2025	Within existing resources	Staff progress appropriately through the career grade
	Ensure staff are kept up to date on legislation, working practices and corporate matters	All Managers	March 2025	Within existing resources	Improvement in efficiency and staff satisfaction
	Ensure there is depth and breadth of knowledge within and across Teams and Offices to provide cover for absences, staff progression and departures	Principal Managers	March 2025	Within existing resources	Improvement in efficiency and staff satisfaction
10. Apply the Sickness Management Procedure and achieve the sickness target	Apply the Sickness Absence Procedure	Head of Pensions	March 2025	Within existing resources	Improvement in efficiency Achieve 2024/25 target of no more than 6.0 days sickness per person
11. Joint Working Opportunities	Continue to explore and consider options for joint working with	Head of Pensions	March 2025	Within existing resources	Development of more joint working relationships

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
	other administering authorities and organisations				
	Maximise the use of framework agreements when tendering services	Head of Pensions	March 2025	Within existing resources	Tenders are placed through framework agreement where available and appropriate
12. Develop the pensions administration systems to enhance the service to members and employers	Continue the roll out of monthly contribution posting and data submission for employers	Principal Pensions Manager	March 2025	Within existing resources/Civica	Employers start to move onto monthly contribution posting and data submission
	Increase automation of individual processing	Principal Pensions Manager	March 2025	Within existing resources/Civica	Increased automation successfully implemented
	Upgrade the employer administration portal	Principal Pensions Manager	March 2025	Within existing resources/Civica	The employer administration portal is upgraded and fully operational
	Develop the data validation module	Principal Pensions Manager	March 2025	Within existing resources/Civica	Data validation module fully operational
	Adopt the use of the management information and reporting module within UPM	Principal Pensions Manager	March 2025	Within existing resources/Civica	Management information produced using this module, which leads to improved service provision

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
	System changes needed for McCloud fully operational and member records updated	Principal Pensions Manager	March 2025	Within existing resources/Civica	Member records updated.
	Prepare for the introduction of the Pensions Dashboard	Principal Pensions Manager	March 2025	Within existing resources/Civica	The Fund is able to provide data onto the Pensions Dashboard when it goes live.
	Consider the need to move from Oracle to SQL	Principal Pensions Manager	March 2025	Within existing resources/Civica/ICT	Decision taken on whether the move is needed
	Introduce increased payroll automation.	Principal Pensions Manager	March 2025	Within existing resources/Civica	New module implemented and operational
	Introduce Retire Online	Principal Pensions Manager	March 2025	Within existing resources	Retire online goes live with no major issues
	Increased the automation for bulk processing	Principal Pensions Manager	March 2025	Within existing resources	Increased automation successfully implemented
	Implement the Civica GMP rectification module and update member records	Principal Pensions Manager	March 2025	With assistance from Civica	All rectification work completed

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
	Monitor the position on GMP equalisation and develop an action plan once the appropriate guidance has been issued	Principal Pensions Manager	March 2025	Within existing resources	GMP equalisation guidance acted on and plan developed
	Introduce improved and more efficient working practices into UPM	Principal Pensions Manager	March 2025	Within existing resources	Improvement in quality and efficiency of pensions processing
	Review key admin processes	Principal Pensions Manager	March 2025	Within existing resources	
	Improve online help and guidance notes	Principal Pensions Manager	March 2025	Within existing resources	The adoption of a policy to proactively contact members.
	Undertake a review of online forms	Principal Pensions Manager	March 2025	Within existing resources	
	Consideration will be given to proactively contacting members to offer making trivial commutation payments	Principal Pensions Manager/ Technical Manager	March 2025	Within existing resources	
13. Introduce improved working practices across pensions processing	Continue to develop the new range of internal performance indicators for pensions processing to ensure that the data collection process and reporting is both robust and accurate	Principal Pensions Manager	March 2025	Within existing resources	The new range of performance indicators becomes embedded in the performance management processes and there is a high level of achievement against the targets set out in the indicators

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
	Achieve the 2024/25 timetable for processing	Principal Pensions Manager	March 2025	Within existing resources	Timetable achieved
	Work with employers to improve quality and timeliness of data	Principal Pensions Manager	March 2025	Within existing resources	Improved information flows from the employers database. Improved pensions processing
	Ensure the Fund is dashboard ready by the staging date	Principal Pensions Manager	September 2025	Within existing resources/Civica	The Fund is able to go live with the Pensions Dashboard
	Carry out a data scoring exercise on common and scheme specific data and implement improvement plans. This should ensure LGPS standard specific data scoring module is fully implemented	Principal Pensions Manager	November 2024	Within existing resources	High data scores Improved pensions processing
	Undertake a member tracing exercise for all members with whom we have lost contact	Principal Pensions Manager	March 2025	Within existing resources	Database accurate Improvement in the number of benefit statements produced
14. Ensure appropriate data security is in place	Work with the Council and industry-wide working groups to	Principal Pensions Manager	March 2025	Within existing resources	The requirements of GDPR are met and there are no significant data breaches

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
	ensure that the requirements of GDPR continue to be met				
	Work with the Council and industry-wide working groups to ensure that the requirements of cyber security continue to be met	Principal Pensions Manager	March 2025	Within existing resources	There are no significant cyber security breaches
	Report on and monitor data breaches	Principal Pensions Manager	March 2025	Within existing resources	The requirements of GDPR are met and there are no significant data breaches
	Ensure all staff undertake appropriate training courses provided by the Council	All Managers	March 2025	Within existing resources	No staff have been identified as not having undertaken training
15. Ensure the Fund has appropriate Performance Management processes	Maintain Performance Management processes	Head of Pensions	March 2025	Within existing resources	Increased awareness of position on service delivery Improvement in quality of service
	Consider enhancements to the approach to performance management. In particular in relation to the Pensions Office	Head of Pensions/Principal Pensions Manager	March 2025	Within existing resources	Increased awareness of position on service delivery Improvement in quality of service

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
	Participate in benchmarking exercises	Principal Managers	March 2025	Within existing resources	Participate in benchmarking exercises and use output to improve efficiency
16. Maintain financial control and meet the requirements for the final accounts and annual report	Maintain financial control	Head of Pensions/ Budget Holders	March 2025	Within existing resources	Standards of budgetary control and financial management maintained Net expenditure is within budget
	Achieve the deadlines for the closedown of the 2023/24 accounts	Principal Investment Manager	November 2024	Within existing resources	Meet internal deadline for closedown of the 2023/24 final accounts. Clean audit report
	Achieve statutory requirements and consider best practice guidance for the 2023/24 annual report	Principal Investment Manager	December 2024	Within existing resources	Met internal deadline for 2023/24 annual report. Clean audit report
17. Fully embed a Risk Management framework	Risk Register is up to date and acted upon	Principal Governance and Funding Manager	March 2025	Within existing resources	Quarterly review of Risk Register is reported to the Local Pension Board and there is an improved awareness of and control of risk
	Business Continuity Plans is up to date	Principal Managers	March 2025	Within existing resources	Annual review takes place and the service is able to

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
					operate should an incident occur.
	Workplace risk assessments are reviewed at least annually, are up to date and actions are implemented	Head of Pensions and all Managers	March 2025	Within existing resources	Annual review takes place and no major incidents
	Hybrid working risk assessments have been undertaken and outstanding items actioned by managers	Head of Pensions and all Managers	March 2025	Within existing resources	All assessments complete and no actions outstanding
	The Service is represented on risk management groups	Head of Pensions	March 2025	Within existing resources	Improved awareness of risk and control of risk
	Staff have attended appropriate training courses	Principal Managers	March 2025	Within existing resources	Improved awareness of risk and control of risk
	Work with the Internal Audit Service and Deloitte to develop and achieve the internal audit programme	Head of Pensions	March 2025	Within existing resources	Improved awareness of risk and control of risk Positive annual report from audit to Pensions Committee
18. Ensure the Fund has an appropriate approach to Equity, Diversity and Inclusion and this is	Participate in the Equality, Diversity and Inclusion Working Group	Principal Governance and Funding Manager	March 2025	Within existing resources	Information used to improve service delivery

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
considered in shaping the service delivered	Analyse the results of the EDI surveys being conducted on employees and members and liaise with management team	Principal Governance and Funding Manager / Principal Pensions Manager	March 2025	Within existing resources	
	Where possible and appropriate consider EDI issues regards to Committee and Local Pension Board membership	Head of Pensions	March 2025	Within existing resources	Improved governance arrangements
	Carry out a regular equality check to ensure that we are compliant with the Equality Act 2010	Principal Pensions Manager	March 2025	Within existing resources	Compliance with Equality Act 2010
	Aim 5 – Make pensions issues understandable to all				
19. Governance Structure	Keep the governance structure, including the format of meetings and training, under review.	Head of Pensions	March 2025	Within existing resources	Governance structure remains appropriate Positive governance report from Isio
	Review and implement changes, as appropriate, from the Good Governance review of the LGPS	Principal Governance and Funding Manager	March 2025	Within existing resources	Compliance with the Good Governance review

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
	commissioned by the Scheme Advisory Board				
	Review and implement changes, as appropriate, from the Pensions Regulator's General Code	Principal Pensions Manager/ Principal Governance and Funding Manager	March 2025	Within existing resources	Compliance with best practice as set out in the Regulator's review
	Ensure the training programmes comply with best practice and meet the needs of the Committee and Local Pension Board Members	Principal Governance and Funding Manager	March 2025	Within existing resources	Compliance with Investment Principles, pensions legislation, CIPFA Codes of Practice and the requirements of the Pensions Regulator
	Assess the training delivered against the new CIPFA Code of Practice on Public Sector Pensions Finance Knowledge and Skills and use this to identify gaps in any training delivered	Principal Governance and Funding Manager	September 2024	Within existing resources	Compliance with the CIPFA Code of Practice
	Review the online training package available from Hymans Robertson (and any other packages that are available) and take a view whether it should be used in 2024/25	Principal Governance and Funding Manager	June 2024	Within existing resources	Decision taken which enhances the approach to training

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
20. Develop communication with and training for current and prospective employers	Develop an engagement strategy for employers	Principal Pensions Manager	June 2024	Within existing resources	Employers are better equipped to manage pensions issues Improvement on efficiency
	Develop the role of the website in communications	Principal Pensions Manager	March 2025	Within existing resources	Employers are better equipped to manage pensions issues Improvement on efficiency
	Enhance the training programme for employers	Principal Pensions Manager	March 2025	Within existing resources	Employers are better equipped to manage pensions issues Improvement on efficiency
	Conduct a survey of employers to ensure that we are aware of employers' views on the service we offer	Principal Pensions Manager	March 2025	Within existing resources	Completion of survey with good levels of satisfaction
	Undertake an annual survey to seek information that might impact on the status of each	Principal Pensions Manager/	March 2025	Within existing resources	Completion of survey and review of returns to identify any issues of

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
	employer's admission to the Fund	Principal Governance and Funding Manager			concern. No employers default
	Increase the use of video conferencing for meetings and training	Principal Pensions Manager	March 2025	Within existing resources	Increased satisfaction from employers
21. Develop communication with members	Develop an engagement strategy for members	Principal Pension Manager	June 2024	Within existing resources	Membership is better informed and equipped to take pensions decisions
	Undertake a holistic review of member engagement, to include reviewing member positions on Committee and the Board	Principal Pensions Manager / Principal Governance and Funding Manager	March 2025	Within existing resources	High levels of system availability Efficiency savings
	Continue to develop, enhance and roll out the use of electronic communications to members to provide and receive information	Principal Pensions Manager	March 2025	Within existing resources	Increased use of online services
	Work with scheme employers to join up communications, promote online services and improve take-up	Principal Pensions Manager	March 2025	Within existing resources	
	Continue to deliver improvements to member self-service	Principal Pensions Manager	March 2025	Within existing resources	

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
	Deliver the 2024 benefit statements in an electronic format	Principal Pensions Manager	August 2024	Within existing resources	Electronic pensions mailing is available and satisfaction levels are high
	Deliver the 2024 pensioners' annual mailing in an electronic format	Principal Pensions Manager	April 2024	Within existing resources	Electronic pensions mailing is available and satisfaction levels are high
	Communicate the implications of McCloud with members	Principal Pensions Manager/	September 2024	Within existing resources	Legal requirements met on communications
	Consider the use of social media in the communications strategy	Principal Pensions Manager	March 2025	Within existing resources	Membership is better informed and better equipped to take pensions decisions
	Achieve the statutory deadline of 31 st August to produce the deferred benefit statements and the annual benefit statements	Principal Pensions Manager	August 2024	Within existing resources	Statutory deadline achieved and the number of statements issued is higher than the previous year
	Undertake a review of the AVC provider and provision for the Fund's members	Principal Pensions Manager/	June 2024	Within existing resources	AVC offering remains appropriate for the membership
	Enhance the public website	Principal Pensions Manager	December 2024	Within existing resources	Review completed and enhancements made to the public website
	Consider the use of chat bots and thereafter web chat	Principal Pensions Manager/	March 2025	Within existing resources	Chat bots introduced

Objective	Action	Responsibility	Target Date	Resource Implications	Evidence of Success
	Continue to develop new management information for the helpline	Principal Pensions Manager	March 2025	Within existing resources	Improved Management Information for the helpline
	Work with the Local Government Association and the National Communications Group to develop the National LGPS website and deliver standard guides, documents and communications across the LGPS	Principal Pensions Manager	March 2025	Within existing resources	Delivery of the National LGPS website which is seen by members as an important part of the communications strategy

