

Member Self Service	Continued Improvements	To use MSS facilities to allow letters to be uploaded to members to reduce postage, and allow for them to return their forms in the same way.	On-going	Work continues on these documents.	Online Retirement Process is being worked on for deferred members approaching retirement. Further detail in the main report.	Online Retirement Process is being worked on for deferred members approaching retirement. This is expected to be launched on a trial basis during April.	A small number of cases have been processed through the online process and the trial will continue throughout July.
Governance	Continued Improvements / Payments and Taxation / Employers and iConnect	Examine areas of governance, including the implementation of the recommendations made by SAB's 'Good Governance' Project, ensuring that the section is compliant in all areas	On-going	Guidance expected later this year.	Guidance still outstanding	Guidance still outstanding. More detail in main report.	Guidance still outstanding
McCloud Project Phase 1	McCloud / Continued Improvements	Employers to provide member data to Pensions, i.e. hours changes and service breaks covering the period April 2014 to March 2022, which we will need to upload to our records prior to implementation of the 'remedy' once confirmed, to assess whether pension benefits will need to be adjusted in light of the McCloud/Sargeant ruling.	30/06/22	Update is expected on this from Heywood at the end of April.	Separate report provided on this topic.	Work on-going with this exercise.	Latest update in the main report.
McCloud Project Phase 2	McCloud / Continued Improvements	Implementation of the 'remedy', including the recalculation and amendment of benefits, plus communication to scheme members of the changes. Remedy may also include other aspects, e.g. possible option for members to aggregate any separate records, yet to be confirmed.	31/12/22	Regulations expected this year.	Regulations expected this year.	Regulations expected this summer.	Latest update in the main report.
Data Quality Issues	Continued Improvements	Data Errors raised through the annual Common Data / Scheme Specific Data reports need to be cleared in order to improve the TPR 'Data Score'. Other data errors raised through Hymans' Data Portal as part of preparation for Mid Term Valuation Exercise.	TPR Reports 31/7/2021: Mid Term Valuation Exercise 30/9/2021	As per the main report, Current Common and Scheme Specific Data scores to be included each report. Figures as at 6th April 2022 are: Common Data: 97.2%; Scheme Specific Data: 97.59%	Latest figures as at 10th January 2023 are: Common Data: 97.3%; Scheme Specific Data: 97.84%	Latest figures as at 30th March 2023 are: Common Data: 97.3%; Scheme Specific Data: 97.75%	Latest figures as at 30th June 2023 are: Common Data: 97.1%; Scheme Specific Data: 97.36%
Internal Processes	Aggregation Process	Review of Aggregation Process underway with the aim of simplifying Processes and reducing outstanding cases	On-going			Details provided in main report.	A revised set of letters relating to aggregations is being worked on by the LGA to act as templates for funds to use. Once these are available we will review our current letters and update where appropriate. Meanwhile training of team members continues to expand their knowledge of the various types of cases.
Payroll Conversion Project	Continued Improvements	Upgrades to payroll facilities to increase automation relating to monthly pensions processes and other payments	Autumn 2023				Work on this project has begun again following a temporary halt to focus on other areas. Heywood are upgrading the system 'build' in 'test' versions of payroll to allow testing to resume on cases.
Letter improvements	Continued Improvements	Examine estimate and retirement option letters with the aim of reducing the amount of manual input required.	On-going				Initial work is in respect of the standard estimate letter. Testing and development on-going.
Office Process Improvements	Early Leavers Team	Production of an online enquiry form, designed to reduce the number of initial enquiries that have to be returned to members due to insufficient information being provided. Currently, approximately 20% of enquiries are returned to members with a request for further clarification.	01/07/23				An online form has been developed and added to the member website. It contains compulsory fields to ensure all required information is provided first time. Members are now directed to this instead of an email address.

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