

	WSCC's Role	HCC's Role	Future Activity	How often it should be reviewed	Previous PAB review date	Next date for PAB review
Website	Review at least annually and feedback on content on as required basis.	Maintain and review content of website as necessary.	Updated with amendments to regulations/processes.  Review when Annual review feedback provided.	Ongoing	N/A	N/A
Member and Employer Portal	Feedback on content/messages displayed	Maintain and update functionality / content as necessary.	Update/Amendments to functionality.	Ongoing	N/A	N/A
Annual newsletter for pensioners	Feedback on template	Draft template and sign off following WSCC feedback		Annually (April/May)		06/2020
Annual Benefit Statements	Feedback on template	Draft templates and sign off following WSCC feedback	Provide active and deferred benefit statements to all eligible members by 31 August 2020	Annually	[TBC]	[TBC]
Pensions Savings Statements	Feedback on template	Draft templates and sign off	Provide pensions savings statement to members who have exceeded annual allowance by 6 October 2020.	Annually	[TBC]	[TBC]
Payslips (where their pension varies by £1).	Feedback on changes to content, when applicable.	Template based on administration team's existing version – changes will be made where necessary. Payslip production following monthly pensions payroll.	Where pension varies by at last £1, hard copy payslip will be issued. Otherwise published via portal each month.	Monthly		
Latest news updates (specific topics, changes to the regulations)	Sign off of content when comms specific to West Sussex.	Website updates. West Sussex specific communications would be drafted, and template shared for feedback/sign off.	Monthly Correspondence Meeting	Ongoing	02/2020	
Providing and advertising the Pre-Retirement course	Learning and Development run the pre-retirement course, this is advertised on their pages.	N/A		Ongoing	N/A	N/A
Employer workshop sessions	Feedback on proposed content	Draft content and sign off.	Development of biannual Employer Days	Biannual	[TBC]	[TBC]
Providing calculations and costings of early retirement scenarios as requested	Provide HCC with revised factors when required.	HCC calculate as per normal processes.	On receipt of an authorised Employer Initiated Retirement Form (EIRA).	Ongoing	N/A	N/A
Employer newsletters (Employer Matters)	Feedback on template	Draft template and sign off following WSCC feedback		Quarterly	11/2019 02/2020	06/2020
Stop Press publications	Feedback/sign off if West Sussex specific.	For LG wide - draft content and make WSCC aware of stop press. For West Sussex specific – draft content and provide copy for sign off.		Ongoing	[TBC]	[TBC]
Annual General Meeting	Lead	HCC provide an update on performance (HCC and Employer)	Development of agenda	Annual	24/07/2019	22/07/2019
Training for small groups	Propose appropriate sessions	Draft content and sign off		Ongoing	N/A	N/A
Focus group meetings	Feedback on agenda.	Draft agenda and content		Biannual	[TBC]	[TBC]
Actuarial Valuation meetings	Agenda and content in line with Fund Actuary.	Attend as required		Triennial	N/A	N/A
Training on provision of end of year member data, including the completion of the appropriate data capture spreadsheet.	Feedback on content	Draft content, provide to WSCC for feedback and sign off.		Annual	N/A	N/A
Requesting feedback from customers as part of the Customer Services Excellence accreditation.		HCC request feedback from relevant parties including via email signature, training surveys sent to employer training attendees and complaints/compliments reporting	Training surveys Reporting of complaints and compliments	Ongoing		09/2020