

Register of Pension Fund Policy Documents

POLICY	Regulation	Responsibility under Constitution	Importance	How often it should be reviewed	Most recent PAB review date	Next date for PAB to review
<u>Actuarial valuation</u>	<u>LGPS Regulations 2013 Regulation 62</u>	N/A	Statutory required	Every 3 years	May 2023	After 31 March 2026
<u>Administering Authority Discretions</u>	<u>LGPS Regulations 2013 Regulation 60</u>	Pensions Committee	Statutory required	Every 4 years	Apr 2019	Q3 2023/24
<u>Administration Strategy</u>	<u>LGPS Regulations 2013 Regulation 59</u>	Director of Finance and Support Services jointly with the Director of Law and Assurance	Highly recommended	Every 2 years	Apr 2021	Q3 2023/24
<u>Annual Report</u>	<u>LGPS Regulations 2013 Regulation 57</u>	Pensions Committee ¹	Statutory required	Annually	Sept 2022	Q2 2023/24
<u>Breaches policy</u>	<u>Pensions Act 2004 Regulation 70</u>	Director of Finance and Support Services jointly with the Director of Law and Assurance	Highly recommended	Every 2 years	Nov 2021	Q3 2023/24
<u>Business Plan</u>	N/A	Pensions Committee	Highly recommended	Every year	Each meeting	Each meeting

¹ To consider

POLICY	Regulation	Responsibility under Constitution	Importance	How often it should be reviewed	Most recent PAB review date	Next date for PAB to review
<u>Communications Policy Strategy</u>	<u>LGPS Regulations 2013 Regulation 61</u>	Director of Finance and Support Services jointly with the Director of Law and Assurance	Statutory required	Annually	Nov 2022	Q3 2023/24
<u>Conflict of Interest</u>	<u>Public Service Pension Act 2013 Regulation 5(4) and 5(5)</u>		Highly recommended	Every 3 years	Nov 2021 (Draft)	Q3 2024/25
<u>Funding Strategy Statement</u>	<u>LGPS Regulations 2013 Regulation 58</u>	Pensions Committee	Statutory required	Every 3 years	Sept 2022	Q2 2025/26
<u>Governance Policy and Compliance Statement</u>	<u>LGPS Regulations 2013 Regulation 55</u>	Pensions Committee	Statutory required	Every 2 years	May 2022	Q1 2024/25

POLICY	Regulation	Responsibility under Constitution	Importance	How often it should be reviewed	Most recent PAB review date	Next date for PAB to review
<u>IDRP (Internal Dispute Resolution Procedure)</u>	<u>The Pension Regulator & Occupational Pension Schemes (Internal Dispute Resolution Procedures Consequential and Miscellaneous Amendments) Regulations 2008</u>	Director of Finance and Support Services jointly with the Director of Law and Assurance	Highly recommended	Every 3 years		Q3 2023/24
<u>Investment Strategy Statement</u>	<u>LGPS Regulations (Management and Investment of Funds) 2016</u>	Pensions Committee	Statutory required	Every 3 years	May 2023	TBD
<u>Privacy Notice</u>	<u>Data Protection Act 2018 and General Data Protection Regulation (EU) 2016/679</u>	Director of Finance and Support Services jointly with the Director of Law and Assurance	Statutory required	Every 3 years	Apr 2021	Q1 2024/25
<u>Treasury Management Strategy Statement</u>	<u>Treasury Management Code of Practice</u>	Pensions Committee	Required	Annually	Feb 2023	Q4 2023/24

