

Changes since the Board met in February 2021 highlighted

	WSCC's Role	Admin Team Role	Future Activity	How often it should be reviewed	Previous PAB review date	Next date for PAB review
Actuarial Valuation meetings	Agenda and content in line with Fund Actuary.	Attend as required		Triennial	N/A	N/A
Annual General Meeting	Lead	HCC provide an update on performance (HCC and Employer)	Development of agenda	Annual		07/2021
Annual newsletter for pensioners	Feedback on template	Draft template and sign off following WSCC feedback	Full review of format and content for 2022 Pensioner newsletter	Annually (Feb)	02/2021	02/2022
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 2021	Annually	09/2020	11/2021
Early retirement scenarios costings 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	02/2021	09/2021
Employer workshop sessions	Feedback on proposed content	Draft content and sign off.	Development of biannual Employer Days	Biannual	[TBC]	[TBC]
Focus group meetings	Feedback on agenda.	Draft agenda and content		Biannual	02/2021	09/2021
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	04/2021	07/2021
Payslips (where their pension varies by £5).	Feedback on changes to content, when applicable.	Template based on HCC's existing version – changes will be made where necessary. Payslip production following monthly pensions payroll.	Provide electronic payslips and P60's as a default, from June 2021, unless pensioner member opts out and elects for a hardcopy.	Ongoing		
Pensions Savings Statements	Feedback on template	Draft templates and sign off	Provide pensions savings statement to members who have exceeded annual allowance by the Statutory deadline.	Annually	11/2020	11/2021
Portal (Member and Employer)	Feedback on content/messages displayed	Maintain and update functionality / content as necessary.	Update/Amendments to functionality of Member Portal. Initial roll out to key employers of the Employer Hub by March 2021. Full roll out to remaining Employers by August 2021.	Ongoing	N/A	N/A

	WSCC's Role	Admin Team Role	Future Activity	How often it should be reviewed	Previous PAB review date	Next date for PAB review
Pre-Retirement course	Learning and Development run the pre-retirement course, this is advertised on their pages.	N/A		Ongoing	N/A	N/A
Requesting feedback from customers as part of the Customer Services Excellence accreditation.		HCC request 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	04/2021	07/2021
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	04/2021	07/2021
Training for small groups	Propose appropriate sessions	Draft content and sign off		Ongoing	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.	Employer training sessions took place On 23 February on IAS19 Reports which was well received and will be considered for future years. An email was sent to employers on 16 December 2020 and the annual return training took place on 25 March and 30 March where 50 employer representatives attended.	Annual	N/A	N/A
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. Emilymay03 Review when Annual review feedback provided.	Ongoing	N/A	N/A