

The "Future Activity" column has been updated since the Board met in April 2021. Other changes since the Board last met are highlighted as **bold** text.

	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	Current intention is to have <ul style="list-style-type: none"> an initial meeting with employer by March 2022 to advise on the process and their role and to set out the outlook for the valuation. an update to employers at the AGM in July 2022 results meetings with employers by November 2022. 	Triennially	N/A	N/A
Annual General Meeting	Lead	HCC provide an update on performance (HCC and Employer)	A pre-recorded presentation will be shared with employers to coincide with the publication of the Fund's Annual Report. Employers have been asked for any particular topics of focus, and will be invited to provide feedback when the presentation is shared.	Annually	N/A	11/2021
Annual newsletter for pensioners	Feedback on template	Draft template and sign off following WSCC feedback	The team will undertake a full review of format and content for 2022 Pensioner newsletter following the decision to move to online publication only.	Annually	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. A short statement will be added to the notes for McCloud based on the Local Government Association (LGA) wording. A short statement will also be added about exit cap reforms based on the statement currently on the LGA member website. This has been shared with West Sussex.	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). Information is also available via the Employer Hub.		Ongoing	N/A	N/A
Employer newsletters (Employer Matters)	Feedback on template	Draft template and sign off following WSCC feedback	The team are reviewing employer communications including Pensions Matters and Stop Presses to ensure it works for employers.	Quarterly	02/2021	11/2021
Employer workshop sessions	Feedback on proposed content	Draft content and sign off.	Development of biannual Employer Days These are currently being held virtually over two days, with one held in June and the next to be held in September.	Biennially	N/A	N/A
Focus group meetings	Feedback on agenda.	Draft agenda and content	These are currently being held virtually, with one to be held in July 2021 and the other in November 2021.	Biennially	02/2021	11/2021

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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 Meetings continue to be held.	Ongoing	07/2021	11/2021
Payslips (where their pension varies by £5).	Feedback on changes to content, when applicable.	Template agreed and changes will be made where necessary. Payslip production following monthly pensions payroll.	Provide electronic payslips and P60's as a default, from June 2022, unless pensioner member opts out and elects for a hardcopy.	Ongoing		
Pensions Savings Statements	Feedback on template	Draft templates and sign off	Letter being reviewed which provides 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. As at 30 June, there were 131 WS employers signed up for the Hub. Full roll out to remaining employers due to complete by August 2021.	Ongoing	N/A	N/A
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	N/A	N/A
Stop Press publications	Feedback/sign off if West Sussex specific.	Draft content and make WSCC aware of stop press.	The team are reviewing employer communications including Pensions Matters and Stop Presses to ensure it works for employers.	Ongoing	07/2021	11/2021
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.		Annually	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.	References to Hampshire Pension Fund scheme governance are to be removed from the information pages and tiles will be added where there is fund specific information (e.g. AVCs) to make it clearer to members the relevant information. The team are working to update visuals and branding of the website as well as reviewing the employer section. Feedback and suggestions have been invited.	Ongoing	N/A	N/A