

| Appendix 2b - Completed 2020 | | | |
|---|--|----------------------|----------|
| Key Objectives | Tasks | Original Target Date | Status |
| Administration Strategy | | | |
| Member Website | Review member website - accessibility issues | Sep-20 | Complete |
| Employer website | Review Employer website - accessibility issues | Sep-20 | Complete |
| Fire Scheme Member digital engagement | Launch AF&R website with MSS functionality | Mar-21 | Complete |
| Iconnect | Implement monitoring & controls | Jul-20 | Complete |
| Enhance employer support/decision making capabilities | Roll out of employer online discretionary policy tool/including training & support | Aug-20 | Complete |
| Software Developments | Progress ability to bulk delete member records according to data retention policy | Jan-21 | Complete |
| Recruitment | Project to make temp posts permanent | Mar-20 | Complete |
| | Implement temporary training & support role | Jul-20 | Complete |
| McCloud | Plan needed to prepare | Dec-20 | Complete |
| | Review requirement for hour changes | Dec-20 | Complete |
| £95k Exit Payments Cap | Implementation Project | Nov-20 | Complete |
| Statutory refund payment | Review of member data to establish qualifying entitlement to statutory refund under LGPS Regs 2014 | Ongoing | Complete |
| Internal Dispute Resolution Policy | Review internal process – identify resource for stage 1 & 2 review and develop employer engagement | Dec-20 | Complete |
| Investment Strategy | | | |
| | Renewable infrastructure | Commitments made | Complete |
| | New private market allocations | Commitments made | Complete |
| | Strategic Benchmark review | 3Q20 | Complete |
| Monitor risk management strategies ensuring collateral managed efficiently and decisions taken in timely manner | Implement new Equity Protection Strategy | 1Q20 | Complete |
| | Explore dynamic hedging | 3Q20 | Complete |
| Annual review of Investment Strategy Statement (ISS) | Annual or when make significant changes to ISS | Jun-20 | Complete |
| CMA Order Compliance Statement | Prepare compliance statement | 31/12/20 | Complete |
| Investment Communications Strategy | Agree strategy across all stakeholders | Jun-20 | Complete |
| Funding Strategy | | | |
| Valuation and FSS | Identify FSS aspects/policy reviews required post 2019 valuation | Jun-20 | Complete |
| Governance | | | |
| Legal contract retender | Procure using National Framework | 2020 | Complete |
| Effectively manage risks | Implement new process | Jun-20 | Complete |
| Scheme of Delegations | Produce and publish document | Jun-20 | Complete |