

Appendix 2b - Service Plan Projects completed in 2021

Key Objectives	Tasks	Completion Date
Administration Strategy		
Member digital engagement	Activate online ABS availability - deferreds	Jul-21
Progress software developments with Heywood	Development of online leaver form	Mar-22
	Iconnect reporting - Dashboard in place and development of pre load data validation in progress	Mar-22
Recruitment	Project to fill app 10 posts across Member & Employer Services	Jun-21
Training & development plan	Introduce staff training programme covering operational & digital transformation requirements	Mar-22
Revise Fire Service model	Develop revised service offer and SLA	Mar-22
Data improvement	Address Rectification	Mar-22
	Care Roll up	Mar-23
2* McCloud Sageant (Fire Schemes)	Implementation of Immediate Detriment - Fire	Jul-21
NEW ADMIN STRATEGY	Service plan & budget to committee	Mar-21

Governance

Committee & Pension Board	Review papers and content that go to committee and set up library on Modern Gov	Mar-22
Recruitment for Pension Board	new member & employer rep required	Sep-21
Independent Members on Committee	Appoint Independent Member. Terms end 2Q22 (end of 2nd term for one member)	Apr-22

Investments

Transition of assets	Input as member of Brunel Client Group	Jun-21
	Monitor Avon plan for transitioning assets based on Brunel plan	Jun-21
Review of equity allocations	Assess potential to invest all equity assets in sustainable and paris aligned strategies	Dec-21
Review investment Strategy and appropriate risk level	Post interim valuation review risk appetite required to meet funding objective	Mar-22

Climate Change disclosures	TCFD: Report in line withh TCFD recommendations for 2020/21 year end reports	Dec-21
FRC Stewardship Code	Prepare compliance statement	01/12/21
Funding		
Covenant assessment of employers during valuation period	Establish policy for monitoring employer covenant between valuations: rolling timetable for reviewing employers; collection and collation of data; identifying higher risk employers for closer monitoring.	Jun-21
Valuation and FSS	Interim review, identify issues to be considered in 2022 valuation	Oct-21
Actuarial advisory contract retender	Procure using National Framework	Nov-21