

Appendix 2b - Completed Projects 2025

Annual Projects		
Year End	Jun-25	Complete
Annual Benefit Statements	Aug-25	Complete
Pension Savings Statement / Annual Allowance	Oct-25	Complete
Payroll YE	Apr-25	Complete
HMRC Event Reporting	Dec-25	Complete
National Fraud Initiative	Dec-25	Complete
Regulatory/Foundation/Dashboard		
Pensions Dashboard - ISP Connection	Oct-25	Complete
Member tracing Exercise	Feb-26	Complete
Telephony upgrade - Phase 1	Jun-25	Complete
Admin Strategy refresh	Mar-26	Complete
Procurement		
Pension Admin System Procurement (inc Hosting)	Sep-25	Complete
Transformation		
Engage (My Pension Online – upgrade)	Dec-25	Complete
Hosting migration	Sep-25	Complete
Digital mail solution	Dec-25	Complete
Governance		
TPR GCOP gap analysis & action plan	Mar-25	Complete
Annual Reports (Fund, Committee, Pension Board)	Dec-25	Complete
Business Continuity Plan Review	Mar-25	Complete
Pension Committee Governance arrangements Review	Jun-25	Complete
Pension Board governance review	Sep-25	Complete
Training Plan for Committee & Board members	Mar-25	Complete
Recruitment for Committee & Pension Board	Jun-25	Complete
Legal Contract Retender	Dec-25	Complete
Finance		
Final Accounts	Sep-25	Complete
Treasury Management Policy	Mar-25	Complete
Investments		
Local Impact Portfolio	Dec-25	Complete
Impact Reporting	Dec-25	Complete
Pooling: Fit 4 Future - Pool selection	Mar-26	Complete
Funding Strategy		
2025 Valuation	Mar-26	Complete
2025 Funding Strategy Statement	Mar-26	Complete