

Serial	Item	Due Date	Responsible	Remarks	Status
1601	Annual Fire Pension Conference handouts to be shared with the Fire Pension Board.	Completed	V Sharpe	Circulated via e-mail on 21 October 16	Closed
1602	Tax changes affecting lifetime allowance reduction from £1.25m to £1m.	From 6 April 2016	H Scargill/V Sharpe	WYPF newsletter referenced tax changes. WYPF website has leaflets available. V Sharpe to publicise leaflets via weekly bulletin.	Closed
1603	Annual allowance changed significantly.	From 6 April 2016	H Scargill / V Sharpe	Growth calculations sent to K White on 21.10.16 for picking up on 4.11.16 with Vicki.	Closed
1604	Clarify how any corrections will be put onto the finance system post 30 October due to 2015/16 accounts being closed.	As soon as possible	V Sharpe	E-mail sent to A Tierney, Serco on 13 Oct 16 by VS.	Closed
1605	IAS19 (actuarial report) return timetable for next year to be put together	End of December 2016	J Gratrick	Define who sends information to who?	Closed
1606	Calendar of events to be put together from WYPF	As soon as possible	H Scargill		Closed
1607	Inform pension regulator of delay to Annual Benefits Statement	Completed	WYPF	Delay due to software issue.	Closed
1608	Stop employer contributions pensions holiday	30-Sep-16		WYPF have provided report to Serco.	Closed
1609	Staff to be assigned to the correct pension scheme	Mar-17	Serco	To enable appropriate deduction – confirmation report required.	Closed
1610	WYPF require revised data return following payroll corrections	30-Nov-16	Serco	E-mail sent to A Tierney, Serco on 13 Oct 16 by VS.	Closed
1611	Annual benefit statements for 15/16 to be sent to all members.	31-Dec-16	WYPF	Date agreed with The Pension Regulator.	Closed
1612	The Pension Regulator annual survey – October 2016	Completed	P Moore / V Sharpe	Completed and results published	Closed
1701	Provide year end return to Home Office	30-Apr-17	LCC Finance	Based on data available	Closed
1702	Provide mid-year forecasting return to Home Office ( Logasnet return)	06-Sep-17	LCC Finance	K Rossington confirmed by email had data he needed	Closed
1703	Annual Benefit Statements 2017	31-Aug	Serco / WYPF	Serco provide information to WYPF by 30 April in order for statements to be sent by the 31 August 2017.	Closed
		2017			Breach reported to TPR
	Active members			Data finalised December 2018, 40 queries	
		Now January 2018 TBC		Update provided to TPR Feb 18	
1704	Annual Benefit Statements 2017	31-Aug-17	WYPF		Closed
	Deferred members				
1704	Recovery of overpayments – letters to employees	Jun-18	Serco/ LFR	2015/16 – 2016/17 pay statements issued Sep 18. 2017/18 pay statements tbc Pension reconciliation tbc	Closed
1705	Training course to be planned in following new Cllr appointment.	Aug-17	K White	Cllr and CFO attended training on 22 <sup>nd</sup> August	Closed
1706	The Pension Regulator annual survey	Nov-17	P Moore / V Sharpe	Completed	Closed

1707	Attendance at annual conference	9 or 10 Oct	One board member	To discuss at Sept board	Closed
1708	Survey on the administration of the pension Board	Nov-17	V Sharpe/ D Yeates	Completed	Closed
1801	Provide year end return to Home Office	30-Apr-18	LCC Finance	Completed	Closed
1802	Annual Benefit Statements 2018	31-Aug-18	Serco / WYPF	Serco provide information to WYPF by 30 May 18 in order for statements to be sent by the 31 August 2018	Closed
	Active members				
1803	Annual Benefit Statements 2018	31-Aug-18	WYPF		Closed
	Deferred members				
1804	Provide mid-year forecasting return to Home Office (Logasnet return)	6 <sup>th</sup> Sept 2018	LCC Finance	Completed	Closed
1805	Internal audit on Fire Pay / Pensions	April / May 2019	A Crookham	Recently agreed revised schedule in audit plan	Closed
				Audit plan has not been sighted. B Selby noted that this may be to do with the lodged dispute over Serco pay errors some years ago which may be why this audit action was created.	

				16 07 20 – this goes back to pay statement work which has all been finalised. Noted that I would be useful to see feedback on J Castledine's report. A copy to be provided so aware of any Fire Pension issues.	
1806	Review Pensions Auto-enrolment	Ongoing	Serco / WYPF	Commence communications 2020. Review and close at next pension board meeting.	Closed
1807	Pension Annual Banding updated	May-18	V Sharpe		Closed
1808	GDPR Privacy Notice - Ensure requirements have been covered under LCC actions	Oct-18	P Board	Requirement to issue GDPR compliant Privacy Notice?	Closed
1809	Review Pension ombudsmen decision regarding pensionable pay for an RDS FF with various allowances	Sep-18	P Board	(See FPS Bulletin 5)	Closed
1809	Occupational Pension Scheme Survey	01-Oct-18	V Sharpe	See email T Weaver (WYPF) dated 26/9/18	Closed
1810	TPR Annual Survey	Nov-18	V Sharpe		Forward Plan
1901	Pension Board Annual Report	31-Mar-19	Pension Board	Not completed due to capacity issues.	Closed
1902	Provide year end return to Home Office	30-Apr-19	LCC Finance	Completed.	Closed
1903	Annual Benefit Statements 2019 (Active members)	31-Aug-19	Serco / WYPF	Completed.	Closed
1904	Annual Benefit Statements 2018 (Deferred members)	31-Aug-19	WYPF	Completed.	Closed
1905	Recovery of overpayments – Pension reconciliation				Closed
2001	Provide mid-year forecasting return to Home Office (Logasnet return)	Sep-20	LCC Finance	Completed	Closed
2002	TPR Annual Benefit Statement Survey	Nov-20	E Hipworth	08/12 - not yet come through. SD to contact C Hey to identify the position of this.	Closed

2004	Provide year end return to Home Office	30-Apr-20	LCC Finance	Completed	Forward Plan 21
2005	Annual Benefit Statements 2020	Aug-20	Serco/WYPF	August 2020 statutory deadline for annual benefit statements for deferred members. 08/12 - went out. Closed. AB to add for August 2021.	Forward plan 21
2006	Pension Annual Banding updated	May-20	E Hipworth		Closed
2007	TPR Pension Board Survey – Pension Board Survey	Nov-20	Pension Board	08/12 - survey which ties in with effectives of local pension board. Not yet come through. 02/03 - E Hipworth submitted the TPR Public Service Governance & Administration Survey 2020 on the 3 Feb.	Closed
2008	Pension Board Annual Report	Jul-20	S Maycock	08/12 - not yet progressed. SM to bring draft report to next board meeting. AB to put on next meetings agenda. 22 03 21 - circulate prior to next meeting. MB to speak to SM.	Closed
2009	Pension Remedy Actions – LGA return on current retirements	Mar-20	E Hipworth	Completed	Closed
2101	2021	30-Apr-21	LCC Finance	SM - return made to HO which results in getting Fire Pension top-up grant. That was completed but now due to be done in April 2022.	Closed
2102	TPR Public Service Governance & Administration Survey	Jan-22	E Hipworth	16 09 21 - DY confirmed that there will not be a survey and this can be closed until Jan 2023.	Closed
2103	Annual Benefit Statements 2021	Aug-21	Serco/WYPF		Forward plan 22
2104	IDRP Data Collection	May-21	E Hipworth	Completed	Closed
2105	SAB remedy self- assessment survey	Jun-21	E Hipworth	Completed	Closed
2106	Pensions Auto-enrolment	Feb-22	E Hipworth/Serco	Completed	Closed
2107	Provide year end return to Home Office - Fire Pension Top-up Grant	Apr-22	LCC Finance	06 06 22 - SM confirmed this has been completed	Closed
2108	Annual Benefit Statements 2022	Aug-22	Serco/WYPF	Completed	Closed

2109	Annual Scheme Return to the Pensions Regulator	Nov-22	T Weaver - WYPF	Completed	Closed
2110	TPR Public Service Governance & Administration Survey	Jan-23	E Hipworth	Completed by M Baxter	Closed
2111	Provide year end return to Home Office - Fire Pension Top-up	Apr-23	LCC Finance	Completed	Closed
2112	Annual benefit statements	Aug-23	Serco / WYPF	Statements sent out before 31 August deadline	Closed
2113	Annual Scheme Return to the Pensions Regulator	Nov-23	T Weaver - WYPF	Completed	Closed
2114	TPR Public Service Governance & Administration Survey	Jan-24	E Hipworth		Forward Plan
2115	Provide year end return to Home Office - Fire Pension Top-up Grant	Apr-24	LCC Finance		Forward Plan
2116	Annual benefit statements	Aug-24	Serco / WYPF		Forward Plan
2117	Pensions Auto-enrolment	Feb-25	E Hipworth		Forward Plan

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