

Annex 12

Access & Fairness Project Plan

Updated 13/08/2026

TASK	Owner	Deadline	Date Complete	Progress notes
Gender Pensions Gap				
E-mail to Employer notifying of changes	Becky O	30/04/2026	23/04/2026	
Employer training delivered via Teams	Vicki	31/05/2026	19/05/2026	Beck/ Jules to be included to go through process including manual control sheet for absences and encourage all employers to use - put in talking Pensions
Create letter to send to scheme member confirming QAPA	Xaviah	31/05/2026	13/05/2026	
In-house procedures / notes updated for vetting/ control	Beck / Jules/ Xaviah	31/05/2026		Balancing conts received in investment team, manual period until system developed
Councillor & Mayor LGPS access				
Create an opt in form and publish on our website	Becky O	05/05/2026	29/04/2026	
Write to employers notifying of changes	Vicki/ Becky O	13/05/2026	30/04/2026	Send e-mail to target disctricts and put in Talking Pensions April
Investment team procedure to code seperately	Vicki/ Greg	31/10/2026		
I-Connect return process	Beck / Jules	31/10/2026		On-going - monitoring returns
Update website on changes	Becky O	31/10/2026	30/04/2026	
Test Engage to ensure calculators etc work correctly	Rach	31/10/2026		
Aggregation / Transfer procedure review and separate letters for Councillors	Xaviah	31/10/2026		
Include Councillors in EA2P procedure	Rach / Xaviah	31/10/2026		
Altair systems for data recording new starters and PPF letter review	Rach	31/10/2026		
Disclosure Requirements				
Develop communication to issue to all scheme members	Becky O	30/06/2026	25/06/2026	
Issue communication to all scheme members	Becky O / Rach	30/06/2026	25/06/2026	Decision to send via post for all opt out of online and blackhole scheme members (removing status 9). Confirm numbers of those to be sent by post and start process with Adare
News item put on website for members and employers	Becky O	30/06/2026	25/06/2026	
Survivors Benefits & Death Grants / LS tax changes				
Run reports to identify records in scope	Rach	01/07/2026		Reports are being uploaded to the A&F project file on shared drive
Communication issued to those affected	Becky O / Xaviah	01/10/2026		
Survivors recalculating benefits affected by the changes	Xaviah	01/01/2028		
Death Grants for anyone over age 75 - process on how to contact LPR (Inc AVC)	Xaviah	01/01/2028		Discuss at next SAPOG for views on process
Tax implications / how we report to HMRC	Rach / Xaviah	01/01/2028		
Opt Out Reporting Requirements				
Mandatory opt out form template	Becky O			Wait for guidance from LGA
Communication to employers on what the fund requires	Becky O			Wait for guidance from LGA
Statistics on Opt out for employers and fund	Vicki / Rach			Wait for guidance from LGA
Procedure review to monitor receipt of opt out and separate record	Jules/ Beck			Wait for guidance from LGA