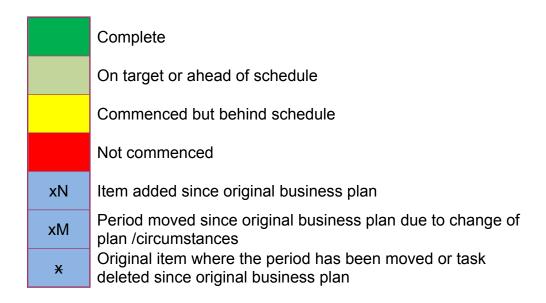
# Business Plan 2017/8 to 2019/20 - Q4 Update

#### **Key Tasks**

Key:



#### **Governance Tasks**

Ref	Key Action –Task	2017/18 Period			Later Years			
		Q1	Q2	Q3	Q4	2018/19	2019/20	
G1	Induction and refresher training for PFC	х	x					
G2	Review of governance related policies, including for asset pooling requirements			х				
G3	Consider Key Person Risk			х	х			
G4	Review/ tender actuarial contract			х	х			
G5	Understanding implications of and actions required as a result of forthcoming legislation including Wales Act and Wellbeing Act				х	х		

## Funding and Investments (including accounting and audit) Tasks

Ref	Key Action –Task	2017/18 Period			Later Years			
		Q1	Q2	Q3	Q4	2018/19	2019/20	
F1	Asset Pooling	х	х	х	х	х	х	
F2	Implications of MIFIDII		х	х	х			
F3	Flight-path "Health check" Review				х	х	х	

### **Administration (including Communications) Tasks**

Ref	Key Action –Task	2017/18 Period			Later Years			
		Q1	Q2	Q3	Q4	2018/19	2019/20	
A1	Development of Workflow Management including Data improvements	х						
A2	Website Launch	х						
A3	Member Self Service	х	х					
A4	Workforce Planning	х						
A5	Backlog to 31 March 2013 (Mercers)	х						
A6	Electronic and Centralised internal procedures	х	х	х	х			
A7	Move to Electronic Annual Benefit Statements	х		х		х		
A8	GMP Reconciliation	х	х	х	х	х	х	
A9	i-Connect		х	х	х	х	х	
A10	Data Protection Changes			х	х	х		
A11	National Pensions Dashboard			хМ	хМ	х		
A15	Aggregation			х	х	х		

# **Employer Liaison Team Tasks**

Ref	Key Action –Task	2017/18 Period			Later Years			
		Q1	Q2	Q3	Q4	2018/19	2019/20	
E1	Review processes	х			x			
E2	Ongoing development of workflow reporting	х			х			
E3	Design reporting information and procedures	х	х					
E4	Staff training for WCBC data extraction	х	х					
E5	Establish plan for outstanding requests		х					
E6	Liaise with new employers for potential agreements	х	х	х	х	x		
E7	Review of Agreements				х	х	х	
E8	Data preparation for i-Connect				х	х	х	