

South Yorkshire Pensions Authority – Outline Corporate Planning Timetable

Time	Activity	Output / Outcome
May 2018	Staff Survey	Information to allow the Senior Management Team to identify activity required to progress delivery of the corporate objectives and identify potential barriers. The survey will also be used to inform the process of change associated with the accommodation move.
July 2018	Senior Management Team Staff Survey	Extended session to consider areas for future development, and key projects for inclusion in future plans together with the appropriateness of existing objectives etc. Provide feedback to staff on results. If the results indicate areas where more in depth probing of issues is required run up to 3 focus groups to do this.
August 2018	Item included in active member newsletter	Feedback on appropriateness of objectives and identification of possible areas for improvement
September 2018	Member workshop	Confirmation of objectives Definition of risk appetite [Identification of investment beliefs to feed into the review of the investment strategy]
October 2018	Annual Fund Member Meeting Meeting with District Council s151 Officers	Feedback on appropriateness of objectives and identification of possible areas for improvement As above
November 2018	Employer Forum Presentation to South Yorkshire leaders	Feedback on appropriateness of objectives and identification of possible areas for improvement As above
22 nd November 2018	Authority Meeting	Draft Estimates for consideration
17 th January 2019	Authority Meeting	Final 2019/20 Budget for approval together with Draft Medium Term Financial Strategy for consideration
Late January / early February 2019	Member seminar Local Pension Board	Informal consideration of draft planning documents Consideration of draft planning documents
14 th February 2019	Corporate Planning and Governance Board Meeting	Draft Corporate Plan, ICT Strategy and HR & OD Strategy for consideration Consideration of revised risk register reflecting the new plans.
14 th March 2019	Authority Meeting	Final Corporate Plan, ICT Strategy, HR & OD Strategy and Medium Term Financial Strategy for approval