

## South Yorkshire Pensions Authority Local Pension Board Action Tracker

Action Ref	Meeting Date When Action was Set	Agreed Action (Completed actions listed first)	Responsible Officer	Status	Update	Target Date for Completion
60	07 August 2025	Make amendments requested to the Constitution update before publishing	Governance Officer	In progress	<p><b>Aug update</b> - Amendments approved by board during August meeting, subsequently finalised and uploaded onto the website. The ToR will be reviewed further as part of the effectiveness review in March 2026. Any new actions arising from the review will be logged as a new action at that time.</p> <p><b>December update</b> - Board agreement to keep action open until effectiveness review completed in March 2026</p> <p><b>February update</b> - Ongoing, will be revised post March effectiveness Review</p>	Mar-26
48	07 November 2024	Bring McCloud Plan to LPB	Assistant Director - Pensions	In progress	<p>Will be incorporated in the quarterly report as soon as available. <b>July Update</b> - still waiting for latest developments from Civica to be live and working in UPM to be able to plan rectification activity.</p> <p><b>Oct Update</b>; Latest developments currently being tested and awaiting outcomes of this.</p> <p><b>Dec 2025 update</b> - Latest UPM McCloud release in Live system environment - now testing capabilities. Running reports/functionality from WC 8 December, it is hoped that the output from this functionality will feed into the manual Rectifications required. A further release is expected for Summer 2026.</p> <p><b>February Update</b> - rectification plan attached at appendix B to Feb Board report. This plan will be added to as errors are fixed and functions developed.</p>	01/11/2025 - change to 31/08/2026
51	20 February 2025	Pension Admin Q Report: Add 'Days of Work To Target' onto the dashboards for each project	Assistant Director - Pensions	In progress	<p><b>July 2025 Update</b> - Benefits Service Manager, AD - Pensions and SM Programmes and Performance working together to agree best way to report the Power BI Dashboard Output to Board.</p> <p><b>Oct Update</b>; still being worked on.</p> <p><b>Dec 2025 update</b> - Service Manager for Programmes and Performance working with Benefits Service manager on LPB reporting.</p> <p><b>February Update</b> - still in progress - on target for reporting Benefits processing statistics from Q1 26/27.</p>	Feb-26
58	07 August 2025	Evaluate how LPB and Authority can work together when producing Effectiveness Reports	Head of Governance and Corporate Services	close	<p>Meeting with LPB and Authority C and VCs held 11 August 25 covering the topic: agreed some Authority and LPB members could meet in person to discuss (potentially at Member Away Day)</p> <p><b>Dec 2025 update</b> - Agenda item for discussion at 8th Jan LPB pre meeting</p> <p><b>February update</b> - Actions agreed for 2026/27 Effectiveness Review approach to capture feedback from LPB/Authority during their individual effectiveness Reviews</p>	Apr-26
61	07 August 2025	Casework Processing - include acceptable tolerance on targets KPI's for processing leavers, deaths, retirements, transfers and divorce cases	Assistant Director - Pensions	In progress	<p><b>Oct Update</b> - tied in with action 51 - subject to resource time to extract data and provide in the format requested.</p> <p><b>Dec 2025 update</b> - As in 51 - Service Manager for Programmes and Performance working with Benefits Service manager on LPB reporting.</p> <p><b>February Update</b> - accepted tolerance is 90% . This is included in the narrative of the report. This can be closed.</p>	Feb-26
63	06 November 2025	Revise Member L&D Strategy 2026/27 to include training on cyber security updates	Head of Governance and Corporate Services	In progress	<p><b>Dec 2025 update</b> - Work commenced on L&amp;D strategy 26/27 an annual training session will be scheduled for Cyber Security and following individual L&amp;D assessments, training identified will be included in the strategy.</p> <p><b>February Update</b> - L&amp;D Strategy drafted, will be presented to the Authority 12/03/26 and LPB 23/04/2026. Cyber Training scheduled for June 2026</p>	Apr-26
64	06 November 2025	Performance quarter report adding outstanding figure at the start and end of the period page 64 of the report	Assistant Director - Pensions	In progress	<p><b>Dec 2025 update</b> - As in 51 - Service Manager for Programmes and Performance working with Benefits Service manager on LPB reporting.</p> <p><b>February Update</b> - linked to Performance Manager and Benefits Service Manager realigning reporting output. Expected new reporting format from 01.04.2026.</p>	Apr-26