

PENSION COMMITTEE WORK PROGRAMME 2025/26

Timescale	Funding	Investment	Governance	Administration & Communication	Training Items #
Standing items		<ul style="list-style-type: none"> Investment Monitoring (inc. CAS update) LCIV/Pooling Update 	<ul style="list-style-type: none"> Work programme 	<ul style="list-style-type: none"> Administration Update 	
2025/26					
Q3 2025/26 (December)	<ul style="list-style-type: none"> Triennial Valuation Initial Results Draft Funding Strategy Statement 	<ul style="list-style-type: none"> Initial Investment Strategy Review Transition of assets to the LCIV 	<ul style="list-style-type: none"> LGPS Fair Access Consultation Delegated Authority: Admittance to the LCIV Delegated Authority: City Academies 	<ul style="list-style-type: none"> Revised Guidance on Transfers out 	
Q4 2025/26 (February)	<ul style="list-style-type: none"> Cashflow forecast 	<ul style="list-style-type: none"> Refined Investment Strategy Review Principles of Responsible Investment TCFD report 2025 Responsible Investment Policy Review* 	<ul style="list-style-type: none"> Risk Register Investment Consultant Strategic Objectives Training Policy Review (inc. conflicts of interest) 	<ul style="list-style-type: none"> Updates to member communication letters (if required) 	<ul style="list-style-type: none"> Responsible investment/climate action (in house)
Q4 2025/26 (March)	<ul style="list-style-type: none"> Triennial Valuation Final Results Final Funding Strategy Statement 	<ul style="list-style-type: none"> Final Investment Strategy Review 	<ul style="list-style-type: none"> Inheritance Tax Changes 	<ul style="list-style-type: none"> Data Protection Impact Assessment 	<ul style="list-style-type: none"> Pensions Portal training
2026/27					
Q1 2026/27 (July)	<ul style="list-style-type: none"> Funding Update 2025/26 		<ul style="list-style-type: none"> City Fund and Pension Fund Accounts 2025/26 		

In addition to training provided either in house or by third party organisations, all Members will be expected to register for tPR online training and complete the modules in respect of **public sector pension schemes** within 12 months of joining the Committee. Members are also required to complete the Barnett Waddingham 'Enlighten!' online training within 12 months.

*Responsible investment activities are undertaken in conjunction with Investment Committee.

Notes

Triennial Review to be taken at same time as Investment Strategy review (2025).

Cashflow forecast and Risk Register are reviewed every 6 months.