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pay, pensions and
employment solutions

The Local Government Pensions Committee
Secretary: Terry Edwards

CIRCULAR

Please pass on sufficient copies of this Circular to your Treasurer/Director of Finance and to your Personnel and Pensions Officer(s) as quickly as possible

No. 203 – JULY 2007

PRACTITIONER & EMPLOYER TRAINING EVENTS

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Purpose of this circular:

1. This Circular has been issued to advise authorities of a number of events being organised by the Local Government Pension Committee in the run-up to the introduction of a “New-Look” Local Government Pension Scheme (LGPS) from 1 April 2008 in England & Wales.

INTRODUCTION

2. It was stated in LGPC Circular 198 of May 2007 that the LGPC were planning to run a series of seminars and training events on the new look LGPS, both at a detailed level during the Autumn of 2007 for administering authorities and again, at a more over-arching level for employers, during January / February 2008.
3. Following comments from a number of local authorities regarding the need for training events to be as early as possible in the calendar due to the decreasing implementation timescale and the issue for consultation, on 22 June 2007, of the draft Transitional Regulations and amendments to the Benefit Regulations, it has been decided to structure the training in three tranches commencing in September 2007 as detailed in sections 2, 3 and 4 of this Circular. Other events already advertised (Fundamentals and the Insight residential course) will, of course, incorporate any further information on the new-look LGPS which is received prior to the running of the courses.

“THE 2008 SCHEME CHANGES” SEMINARS

Seminar Details

4. These seminars will cover the structure of the New-Look LGPS for 2008 in England and Wales, incorporating the transitional arrangements for the reckoning of LGPS rights accrued up to 31 March 2008. The seminars will also consider the challenges of implementing a new-look LGPS and explore the preparations necessary for a seamless transition. The seminars will commence at 10:00 and conclude no later than 16:00 and sessions will include:
 - Joining – Who’s eligible / Auto-entry / Casual employees
 - Pensionable Pay and Contribution Bands
 - Final Pay Calculations
 - How Membership Counts
 - Accrual Rates – New Look vs Old Look vs Mixed Look

- Structure of Retirement Benefits (including ill-health*)
- Structure of Death and Survivors' Benefits
- Extra Benefits (including AVCs)
- A lamentation on what has gone or disappeared
- Tablets of Stone and Communicating the Changes

* dependent on progress on the “lowest-tier” ill-health benefits which are to sit outwith the LGPS, the employer options in this area may be touched upon.

Intended Audience

5. These seminars are primarily aimed at pensions staff within LGPS Administering Authorities and those pension liaison staff within Employing Authorities who require a detailed understanding of the new-look scheme. It follows that the seminars will not necessarily be suitable for delegates with little or no experience of the LGPS (for whom more foundational material such as “Insight” or “Fundamentals” training courses may be more appropriate). This is because, to fully understand the implications of the operation of a new scheme, it is advantageous to already have a grasp of the existing scheme terms.

Dates and Locations

Cardiff Wednesday 12th September, Marriott Hotel

London Friday 14th September, Local Government House

Leeds Tuesday 18th September, Crowne Plaza

London Thursday 20th September, Layden House

Cost and Booking

6. The delegate rate for each seminar, inclusive of lunch, refreshments and all delegate materials is £165 plus VAT at the standard rate.
7. Early booking is highly recommended as places are limited. Bookings are made via the on-line events booking facility which is part of the Local Government Employers’ website at www.lge.gov.uk. Please note our cancellation policy contained in our Terms and Conditions on the website. When booking, you will need full delegate details to hand including the address to which the invoice for payment is to be sent.
8. If the seminar at your preferred location is full and you do not wish to book on one at an alternative location, you are advised to enter your name on the reserves’ list at your preferred location. It is

important to do so as, not only will you have a priority warning should any cancellations occur, but it also enables the LGPC to judge demand for future events or, on occasion, to organise overflow events.

9. If you experience any difficulties in using the on-line website booking facility, please contact Elaine English, LGPC Executive Officer, by email elaine.english@lge.gov.uk

“NEW LOOK ILL-HEALTH” SEMINARS

Background

10. In creating a new-look LGPS for 2008 in England and Wales, CLG are replacing the existing single-tier ill-health provision in the LGPS with a multi tier system. The Benefit Regulations issued in March 2007 include a two-tier system within the LGPS itself and it is proposed that a further, lower, tier will be introduced for those members whose employment is terminated on the grounds of permanent ill health but who are likely to be able to obtain gainful employment within a reasonable period of time. That lower tier would sit outwith the LGPS. Employers would be provided with powers to pay a reviewable benefit under that lower tier from their revenue account (not from the Pension Fund) but the benefit could not continue if alternative employment is gained.

Seminar Details

11. These seminars will cover the new tiered ill-health provisions contained both within and outwith the New-Look LGPS for 2008 in England and Wales. This move from a single-tier provision will mean significant changes in Employing Authority procedures and practices.
12. There will be a number of speakers covering the subject matter (outlined in the following programme) including representatives on behalf of Communities and Local Government, Local Government Employers and the Association of Local Authority Medical Advisors.

Outline Programme & Timing

- **Managing Ill Health - An Overview**

The rationale for change. The distinction between pensions, employment and medical decisions, disability and ill health and the importance of managing risk.

- **The LGPS and Ill Health**

The pre-08 provisions and the new provisions (and protections for over-45s). The explanations will include some worked examples (pre/post differences).

- **The Role of Occupational Health**

The Medical Adviser's role and responsibilities (including the separate employment and pension decisions).

- **The impact on HR practices and policies**

What are they? What significant changes have to be made?

- **Financial implications**

What allowances does the actuary allow for in the valuation process? Do these assumptions change now? What are the cost implications?

- **Getting it right first time!**

If not implemented and managed properly, the introduction of multi-tier ill-health will lead to an increase in the number of disputes and complaints authorities will have to deal with.

Question & Answer Session

09.30 - 09.55	Registration and Coffee
10.00 - 11.30	Session 1
11.30 - 11.45	Refreshment Break
11.45 - 12.45	Session 2
12.45 - 13.30	Lunch
13.30 - 15.00	Session 3
15.00	Departure

Intended Audience

13. This seminar covers the new-look tiered ill-health provisions that sit within and outwith the LGPS. The seminars will be of interest to Administering and Employing Authority staff and medical advisers. In particular, employing authority staff with HR responsibilities will benefit

from obtaining a better understanding of the new provisions and the implications for ill-health retirement procedures for all terminations of employment from 1 April 2008 onwards. The seminars will also be of interest to persons working in Occupational Health Units and persons appointed by employing and administering authorities in the Internal Dispute Resolution process (IDRP).

Dates and Locations

Friday 16th November,

London¹

Church House Conference Centre,
Westminster

Monday 19th November,

Cardiff

Marriott Hotel, Mill Lane

Thursday 22nd November,

Leeds

Crowne Plaza Hotel, Wellington
Street

Cost and Booking

14. The delegate rate for each seminar, inclusive of lunch, refreshments and all delegate materials is £165 plus VAT at the standard rate.
15. Early booking is recommended as places are limited. Bookings are made via the on-line events booking facility which is part of the Local Government Employers' website at www.lge.gov.uk. Please note our cancellation policy contained in our Terms and Conditions on the website. When booking, you will need full delegate details to hand including the address to which the invoice for payment is to be sent.

¹ Please note due to the anticipated high demand of participants at this event on this occasion we are using the Church House Conference Centre rather than our usual internal venue.

16. If the seminar at your preferred location is full and you do not wish to book on one at an alternative location, you are advised to enter your name on the reserves' list at your preferred location. It is important to do so as, not only will you have a priority warning should any cancellations occur, but it also enables the LGPC to judge demand for future events or, on occasion, to organise overflow events.

17. If you experience any difficulties in using the on-line website booking facility, please contact Elaine English, LGPC Executive Officer, by email elaine.english@lge.gov.uk

“UNDERSTANDING THE NEW LOOK LGPS” WORKSHOPS

Background

18. For a number of years the LGPC has held numerous one-day topic-specific “Understanding” workshops covering various aspects, including Compensation, Augmentation, Injury Awards & Gratuities; Transfer Values; Retirement Benefits; Pensions on Divorce; Death & Survivor’s Benefits; and Scheme and Revenue Changes.
19. The LGPC usually keeps the “class” size to a maximum of 12–15 people to ensure that delegates get the most out of the learning experience.
20. In order to continue the LGPC’s plan to deliver training as locally as practicable, the workshops are to be held in a number of locations across the country.
21. At the Understanding workshops, delegates will have the benefit of an experienced tutor, hands-on exercises and a detailed workbook they can take away for future reference. Each Understanding workshop will start at 10:00 a.m. and finish no later than 4:00 p.m., with lunch and refreshment breaks included. As the workshops are delivered “locally” this should avoid the time and expense of overnight stays for many delegates.

Full details of course content, dates and locations will be published in another LGPC Circular later in September/October 2007. The workshops are expected to be held during January and February 2008.

Intended Audience

22. These workshops will cover the basic structure of the New-Look LGPS for 2008 in England and Wales, incorporating the transitional arrangements for the reckoning of accrued LGPS rights. The workshops are primarily aimed at staff of Employing Authorities although they will be of interest to Administering Authority staff and others. The workshops will not necessarily be suitable for delegates with little or no experience (for whom more foundational material such as “Insight” or “Fundamentals” training courses may be more

appropriate). This is because to fully understand the implications of the operation of a new scheme it is advantageous to already have a grasp of the existing scheme terms.

‘INSIGHT’ RESIDENTIAL COURSE FOR PRACTITIONERS AND EMPLOYERS

23. This is the LGPC’s foundation course on the LGPS and includes an A-Z look at the scheme including:
- A history of the Scheme and Current Developments
 - How membership counts in the calculation of benefits
 - The benefits the scheme provides and how they are calculated
 - Preserved Benefits
 - Retirement Benefits
 - Redundancy and Efficiency Retirements
 - Death Grants and Survivors’ Benefits
 - Minimising and resolving disputes
 - Effective Communications
24. A full programme of events was attached as Appendix B to LGPC Circular 195 together with details of the three events running in 2007, one of which has already been run since Circular 195 was issued. Although relatively introductory material, the session handouts do build up into a handy reference guide and feedback from past delegates has shown this reference material to be invaluable. The material for the remaining two courses this year will contain updated material covering the changes already made to the scheme in 2007 (some with retrospective effect to 2006), and the forward-looking session will contain up-to-the-date material on the impending changes from 2008 in England and Wales.

Intended Audience

25. The residential courses are intended for all those involved in LGPS administration. It is suitable for Pensions Office staff and also HR/Finance/Payroll staff for whom the pensions function plays a significant part in their day-to-day and employing authority role. Being a foundation course, the course is aimed at staff who are either relatively new to the pensions scene, or have some experience but want to better understand their own and others’ responsibilities under the terms of the scheme.

Venues and Dates

The Marriott Hotel, Cardiff

3 - 6 September 2007*

The Chatsworth Hotel, Eastbourne

1- 4 October 2007

* limited spaces left

Cost and Booking

26. The cost of each residential course is £625 (plus VAT at the standard rate) per delegate. This includes full board accommodation throughout the course, all delegate material, refreshments throughout the day and a course certificate.
27. Bookings are made via the on-line events booking facility on the Local Government Employers' website at www.lge.gov.uk. Please note our cancellation policy contained in our Terms and Conditions on the website. When booking, you will need full delegate details to hand including the address to which the invoice for payment is to be sent. Early booking is highly recommended as places are limited to a maximum of 15 at each event. Please note that if the event is fully booked you will be advised to enter your name on the reserves' list and this will ensure you are given priority should any delegate cancellations occur.
28. If you experience any difficulties in using the on-line website booking facility, please contact Elaine English by email elaine.english@lge.gov.uk.

ACTIONS FOR ADMINISTERING AUTHORITIES

29. All Administering Authorities are urged to copy this Circular to all employers in their Fund (other than to Local Authorities to whom this Circular has been sent direct) or bring the Circular to the attention of employers by directing them to the Circular on-line at www.lge.gov.uk/lge/core/page.do?pagelD=58678

Tim Hazlewood
LGPC Training and Development Manager
19 July 2007

Distribution sheet

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Local Government Pensions Committee

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