

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. 223 - DECEMBER 2008

PRACTITIONER & EMPLOYER TRAINING EVENTS "UNDERSTANDING" WORKSHOPS

Purpose of this circular:

1. This Circular has been issued to advise authorities of two workshops to be run at many locations across the U.K. that have been organised by the Local Government Pension Committee (LGPC).

Background

2. 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; Death & Survivor's Benefits; and Scheme and Revenue Changes.
3. As many of these workshops are hands-on and contain practical exercises, the "class" size is usually kept to a maximum of 12-15 people to ensure that delegates get the most out of the learning experience.

Details of workshops

4. The topic-specific *Understanding* workshops to be run in early 2009 are 'Transfer Values' and 'Employer Discretions and Policies'.

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part of the LGA group

5. The 'Transfer Value' workshop has been run many times previously but has been updated in line with significant changes in legislation. The practical exercises have also been updated to reflect the changes made.
6. The 'Employer Discretions and Policies' workshop is a new event and has been designed and built due to major interest shown in delegate feedback from the "Understanding the Employer Role" workshops held in August and September 2008.
7. In order to continue the LGPC's plan to deliver training as locally as practicable, the forthcoming workshops are to be held in a number of locations across the country.
8. At the *Understanding* workshops, delegates have the benefit of an experienced tutor and a detailed workbook they can take away for future reference. The Transfer Value workshop will involve several practical exercises and the Employer Discretions and Policies workshop will include several discussion items. 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.
9. Further details on course content, locations and dates can be found in Appendix A attached to this Circular.

Intended Audience for Transfer Values

10. These workshops are particularly aimed at Administering Authority staff and are unsuitable for delegates with little or no experience of the LGPS. The logic and associated mathematics behind Transfer Value methodology are complicated but the workshop attempts to explain both whilst also explaining the processes necessary to comply with overriding legislation and GAD Guidance.

Intended Audience for Employer Discretions and Policies

11. These workshops are particularly aimed at Employing Authority staff who have responsibility for exercising the many discretions open to employers under the Local Government Pension Scheme (LGPS) and associated Compensation provisions. It is assumed that delegates will have some working knowledge of the basics of the LGPS and compensation. It should be noted that the workshop in Edinburgh on 31 March 2009 is intended for Scottish employers only and will be based on the new-look local government pension scheme coming into effect in Scotland on 1 April 2009 and revised discretionary payments legislation that is currently expected.

Cost and Booking

12. The delegate rate for each workshop, inclusive of lunch, refreshments and all delegate materials is £170 plus VAT at the standard rate.
13. 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. Purchase order numbers must also be provided if required by your organisation to pay invoices.
14. If the workshop 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 consider increasing delegate places where possible or, on occasion, to organise overflow events.
15. If you experience any difficulties in using the on-line website booking facility, please contact Colin Divens, LGPC Executive Officer, by email colin.divens@lge.gov.uk

ACTIONS FOR ADMINISTERING AUTHORITIES

16. All Administering Authorities are urged to copy this Circular to all employers in their Fund or bring the Circular to the attention of employers by directing them to the [Circular on the LGE website](#).

Tim Hazlewood
LGPC Training and Development Manager
10 December 2008

UNDERSTANDING... TRANSFER VALUES

Course content covers:

1. The governing legislation
2. Transfers Out
 - Administration
 - Public Sector Transfer Club
 - Calculation Methodology
 - Contracted-In and Contracted-Out Schemes
 - Overseas Schemes / Community Schemes
3. Transfers In
 - Administration
 - From Club Schemes
 - From non-Club schemes
 - The reiteration Process
 - More than a calculation!
4. Inter-Fund Adjustments
 - Administration
 - Methodology (within and cross-Border)
5. Bulk Transfer Arrangements
6. CEVs for Pension Sharing on Divorce (PSoD)
 - A brief look at the methodology
 - (NB: This is not a comprehensive look at CEVs for PSoD – that is a subject in its own right and is covered in detail at a separate Understanding workshop to be run later in 2009)*

Workshop dates, locations & venues:

3 February	London 1	Layden House
5 February	Bristol	Marriott City Centre Hotel
10 February	Leeds	Marriott Hotel
12 February	Cardiff	Marriott Hotel
17 February	Birmingham	Jurys Hotel
19 February	Exeter	Mercure Southgate Hotel
24 February	Liverpool	Marriott Hotel
26 February	Edinburgh	Apex International Hotel
3 March	London 2	Layden House

UNDERSTANDING...EMPLOYER DISCRETIONS AND POLICIES

Course content covers:

- 1) Background to Discretions
 - Why are there any discretions in a Statutory Scheme?
 - How many there are
 - Which ones are subject to a written policy

- 2) Writing Policies
 - Why "Follow the Leader" isn't necessarily sensible*
 - Things for Employers to consider whilst setting/amending policies (cost, anti-discrimination laws etc) in respect of the "Big Ones":
 - Augmentation
 - Additional Pension
 - Full or Partial Flexible Retirement
 - Requests to retire pre-60
 - Release of Deferred Benefits early
 - Compensation (Discretionary Payments)

- 3) The other areas subject to written policies
 - Under the new-look LGPS
 - Retained ones under the old-look LGPS
 - And some you probably thought dead and buried!

- 4) Other Discretions
 - Not subject to a policy doesn't infer "no-cost"
 - LGPS - A look at some of the many discretions available
 - LGPS - Maybe why you should / maybe why you shouldn't
 - Compensation – Injury Awards / Gratuities

* The LGE/LGPC do not (and will not at these workshops) issue policy templates for employers to use but rather give suggestions as to matters to consider together with some suggested wording.

Workshop dates, locations & venues:

17 March	London 1	Layden House
19 March	York	Marriott Hotel
24 March	Cardiff	Marriott Hotel
26 March	Birmingham	Jurys Hotel
31 March	Edinburgh	Apex International Hotel
2 April	Liverpool	Marriott Hotel
7 April	London 2	Local Government House
9 April	Exeter	Mercure Southgate Hotel

Distribution sheet

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Officer advisory group
Local Government Pensions Committee
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Website

Visit the LGE's website at: www.lge.gov.uk

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