

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. 228 - APRIL 2009

PRACTITIONER & EMPLOYER TRAINING EVENTS "UNDERSTANDING" WORKSHOPS

Purpose of this circular:

1. This Circular has been issued to advise administering authorities and employers participating in the Local Government Pension Scheme of three workshops to be run at a number of locations across the U.K. The workshops 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 of the Local Government Pension Scheme and associated Compensation provisions.
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 next topic-specific *Understanding* workshops to be run in 2009 are 'Retirement Benefits', 'Death and Survivor Benefits' and 'Pension Sharing on Divorce'.

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Local Government Employers is the business name of Employers Organisation for Local Government, a company limited by guarantee, registered in England and Wales, number 3676611
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part of the **LGA group**

5. All of these workshops have been run previously but not since 2007 and so have been massively updated for 2009 in line with significant changes in legislation. The practical exercises have also been updated to reflect the changes made.
6. 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. In 2008, the Technical Group agreed that essential training events should be cycled annually rather than every other year and to facilitate this not every workshop will run at every venue as in the past. In putting together the schedule, the Secretariat has attempted to be as 'geographically' fair as possible.
7. For 2009, there will be no bespoke version for Scottish authorities of 'Retirement Benefits' and 'Death and Survivor Benefits' as these topics were covered, albeit in brief, during the January 2009 'New Look LGPS' workshops held throughout Scotland.
8. At the *Understanding* workshops, delegates have the benefit of an experienced tutor and a detailed workbook they can take away for future reference. Each workshop will involve several practical exercises and all necessary delegate material, including calculators, will be provided. The workshops will start at 10:00 a.m. and finish no later than 4:00 p.m., with lunch and refreshment breaks included as well as coffee/tea on arrival from 9:30 a.m. 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 'Retirement Benefits'

10. These workshops are aimed at both Administering Authority and Employing Authority staff in England and Wales but are unsuitable for delegates with no experience of the LGPS. The LGPS is a final salary scheme which has evolved over a long period of time and operates under rules that are quite complex and that are subject to old provision protections (Rule of 85 for example). It is therefore beneficial for delegates to already have some experience of the terms of the scheme, although the course material does cover the basics as well.

Intended Audience for ‘Death and Survivor Benefits’

11. These workshops are primarily aimed at Administering Authority staff in England and Wales who deal with, or need to learn about, the benefits provided on and following the death of a scheme member. It is possible that some “hands-on” Employing Authority staff may also benefit by attending. The workshop will cover benefits under the new and old Local Government Pension Schemes because, as potential delegates will know, the regulations under which a person’s retirement benefits were calculated generally govern the benefits payable on their death.

Intended Audience for ‘Pension Sharing on Divorce’

12. These workshops are solely aimed at Administering Authority staff who deal with, or need to learn about, the overriding provisions on pension sharing on divorce and how the mechanics of this works in the Local Government Pension Scheme. It is improbable that Employing Authority staff would benefit by attending.

Cost and Booking

13. The delegate rate for each workshop, inclusive of lunch, refreshments and all delegate materials is £185 plus VAT at the standard rate.
14. 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.
15. 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.
16. 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

ACTIONS FOR ADMINISTERING AUTHORITIES

17. 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 it on the LGE website.

Tim Hazlewood
LGPC Training and Development Manager
21 April 2009

UNDERSTANDING...RETIREMENT BENEFITS

Course content covers:

1) Final Pay Calculations

- Whole-time, Part-time and Variable-time members
- Old 'Certificate of Protection' and its replacement

2) Types of Retirement

- What is Normal Retirement Date?
- Age/Normal Retirement
- Late Retirement
- Ill-Health Retirement
- Early Retirement and Actuarial Reductions
- Flexible Retirement
- Re-employment of a pensioner

3) Redundancy and Efficiency Retirements

- Pension Fund Benefits
- Augmentation
- Re-employment

4) Early leavers

- Preserved Benefits
- Requests for preserved benefits to be paid early

5) Other areas for consideration

- Notifying the leaver of their benefit options
- Standard Benefits? - converting pension into extra lump sum
- Pensions Increase
- A brief look at Employer discretions
- The Internal Dispute Resolution Procedure (IDRP)

Workshop locations & dates:

28 May	London 1	Local Government House
3 June	London 2	Victoria Park Plaza Hotel
4 June	Birmingham	Jurys Inn Hotel
9 June	Cardiff	Marriott Hotel
11 June	Peterborough	Marriott Hotel
16 June	Leeds	Marriott Hotel
18 June	Liverpool	Marriott Hotel

UNDERSTANDING...DEATH & SURVIVORS' BENEFITS

Course content covers:

- 1) Death Grants**
 - In Service / Deferred / Pensioner
 - Absolute Discretion & Expression of Wish
- 2) Death & Additional Voluntary Contributions**
- 3) Widows pension:**
 - In Service / Deferred / Pensioner
- 4) Widower's pension:**
 - In Service / Deferred / Pensioner
- 5) Civil Partner's pension:**
 - In Service / Deferred / Pensioner
- 6) The effect of Guaranteed Minimum Pensions**
- 7) Nominated Cohabiting Partners' pensions:**
 - The process of nominating
 - The criteria for nomination
 - Evidence!
 - The benefits payable
- 8) Childrens' pensions:**
 - Eligible Children
 - Benefits payable and for how long

Workshop locations & dates:

23 June	Durham	Durham County Cricket Club
25 June	Birmingham	Jurys Inn Hotel
30 June	London	Local Government House
7 July	Exeter	Thistle Hotel
9 July	Cardiff	Marriott Hotel
14 July	Liverpool	Marriott Hotel
16 July	Leeds	Marriott Hotel

UNDERSTANDING... PENSION SHARING ON DIVORCE

Course content covers:

1. Background and Overview
2. Earmarking Orders
3. The 4 stages in the Pension Sharing process
 - Information to be provided at each stage
 - Deadlines for compliance
 - Penalties for non-compliance
4. Valuing a scheme member's benefits
5. Calculating the Pension Debit and Pension Credit
6. Implementation and Discharge of Liability
 - Pension Credit – how and when payable?
7. Charging
8. Death, Transfers in and Transfers out

Workshop locations & dates:

18 August	London 1	Layden House
20 August	Edinburgh	Apex International Hotel
25 August	Birmingham	Jurys Inn Hotel
27 August	London 2	Layden House
8 September	Leeds	Marriott Hotel
10 September	Exeter	Thistle Hotel
22 September	Cardiff	Marriott Hotel
24 September	Eastbourne	Chatsworth Hotel

Distribution sheet

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Local Government Pensions Committee
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CLG
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Website

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

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