

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. 231 - NOVEMBER 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 United Kingdom. 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 people to ensure that delegates get the most out of the learning experience.

### Details of workshops

4. The next topic-specific *Understanding* workshops are to be run in 2010 and cover 'Transfer Values', 'The Employer Role' and 'Guaranteed Minimum Pensions'.

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[www.lge.gov.uk](http://www.lge.gov.uk)

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part of the LGA group

5. All of these workshops have been run previously between 2007 and 2009 but will be updated for 2010 in line with changes in legislation and/or guidance issued since the workshops were last run. The practical exercises will have been refreshed and updated accordingly.
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 the case of "Transfer Values" only a few workshops are being run to satisfy the overflow of demand from the run of sell-out events in 2009. In putting together the entire schedule, the Secretariat has attempted to be as 'geographically' fair as possible.
7. 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.
8. Further details on course content, locations and dates can be found in **Appendix A** attached to this Circular.

#### **Intended Audience for 'Transfer Values'**

9. These workshops are particularly aimed at Administering Authority staff who deal with, or need to learn about, cash equivalent transfer values (CETVs) and inter-fund adjustments (IFAs). They are unsuitable for delegates with little or no experience of the LGPS. The logic and associated mathematics behind the methodology are complicated but the workshop attempts to explain both whilst also explaining the processes necessary to comply with overriding legislation and GAD Guidance. It is improbable that Employing Authority staff would benefit by attending.

#### **Intended Audience for 'The Employer Role'**

10. These workshops and the material outlines the basic structure of the LGPS and focuses on the employer's role and responsibilities. Therefore they will be of most value to employing authority staff, including those with little or no experience, who need to better understand the part they play in administering the LGPS.

## **Intended Audience for 'Guaranteed Minimum Pensions'**

11. These workshops are solely aimed at Administering Authority staff (including pensioner payroll staff) who deal with, or need to learn about, the overriding provisions about Guaranteed Minimum Pensions, how the mechanics actually work in the Local Government Pension Scheme, and the changes necessary from 6 April 2010 . It is improbable that Employing Authority staff would benefit by attending.

## **Cost and Booking**

12. The delegate rate for each workshop, inclusive of lunch, refreshments and all delegate materials is £185 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](http://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. Please note that all invoices will be sent **after** the event has taken place.
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 (as is the case with the extra transfer values events announced in this circular).
15. If you experience any difficulties in using the on-line events booking facility, please contact Elaine English, LGPC Executive Officer, by email [elaine.english@lge.gov.uk](mailto:elaine.english@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 it on the LGE website.

**Tim Hazlewood**  
**LGPC Training and Development Manager**  
**3 November 2009**

**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 in a separate Understanding workshop)*

**Workshop locations & dates:**

07 January	London	Victoria Park Plaza Hotel
12 January	Birmingham	Jurys Inn Hotel
14 January	York	Marriott Hotel

## UNDERSTANDING...THE EMPLOYER ROLE

### Course content covers:

- 1) **Joining the LGPS**  
Who can join and perhaps why they should
- 2) **How Membership Counts**  
In a Final Salary Scheme this is crucial
- 3) **Pay and Final Pay**  
In a Final Salary Scheme this is crucial too
- 4) **Changes in Circumstances**  
Breaks in service, changes in hours etc
- 5) **Regulatory Requirements – Actives**  
What you must do by law
- 6) **All Types of Retirement**  
A significant section looking at all the retirement benefits possible
- 7) **Early Leavers**  
What happens when people leave before retirement age
- 8) **Other Areas for Consideration**  
Including employer discretions, maximising tax-free cash and internal dispute resolution procedures (IDRP)

### Workshop locations & dates:

26 January	London	Victoria Park Plaza Hotel
28 January	Cardiff	Marriott Hotel
02 February	Birmingham	Jurys Inn Hotel
04 February	Liverpool	Marriott Hotel
09 February	Leeds	Marriott Hotel
11 February	Peterborough	Marriott Hotel

## **UNDERSTANDING... GUARANTEED MINIMUM PENSIONS**

### **Course content covers:**

- 1) The background to Contracting-Out and the 2010 changes**
- 2) The basis of calculating GMPs**
  - Accrual Rates
  - Earnings Factors
  - Method of revaluation of earnings factors
- 3) Revaluation of GMPs and Anti-Franking**
- 4) Increments where retirement deferred past State Pension Age**
- 5) The effect on Pensions Increase calculations**
  - At and after State Pension Age
  - GMPs accrued pre and post 1988
  - Interaction with State Additional Pension/Component
- 6) Survivor's GMPs**

### **Workshop locations & dates:**

02 March	London 1	Victoria Park Plaza Hotel
04 March	Exeter	Thistle Hotel
09 March	Liverpool	Marriott Hotel
11 March	Birmingham	Jurys Inn Hotel
16 March	Cardiff	Marriott Hotel
18 March	Durham	Cricket Club
23 March	Edinburgh	Apex City Hotel
25 March	London 2	Victoria Park Plaza Hotel
30 March	Leeds	Marriott Hotel

## **Distribution sheet**

Local authorities who have registered for notification of Circulars  
Pension managers (internal) of administering authorities  
Pension managers (outsourced) and administering authority client managers  
Officer advisory group  
Local Government Pensions Committee  
Trade unions  
CLG  
COSLA  
SPPA  
Regional Directors  
Private clients

## **Website**

Visit the LGE's website at: [www.lge.gov.uk](http://www.lge.gov.uk)

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