

The Local Government Pensions Committee
Secretary: Terry Edwards

CIRCULAR

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No. 241 - NOVEMBER 2010

PRACTITIONER & EMPLOYER TRAINING EVENTS

FORTHCOMING “UNDERSTANDING” WORKSHOPS IN 2011

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 early 2011 and cover ‘Retirement Benefits’, ‘Pensions on Divorce’ and ‘Death and Survivor Benefits’.

5. All of these workshops have been run previously, some several times between 2003 and 2009, but will be updated for 2011 in line with changes in legislation and/or guidance issued since the workshops were last run. For example, the Pensions on Divorce course will cover a whole new section on the application of a pension debit now that GAD guidance is available in this area; the Retirement Benefits course only skims the area of final pay (now the subject of a separate course) leaving more time to look at the various types of retirement benefits that exist and the options that surround them. Also, all practical exercises are being revisited and also refreshed and updated from old versions used in previous courses.
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 putting together the entire schedule, the Secretariat has attempted to be as 'geographically' fair as possible although, regrettably, a few locations that proved unpopular and therefore not economically viable in 2010 have been omitted.
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 'Retirement Benefits'

9. 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 'Pension Sharing on Divorce'

10. 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.

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.

Cost and Booking

12. The delegate rate for each workshop, inclusive of lunch, refreshments and all delegate materials is £195 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.local.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 Elaine English, LGPC Executive Officer, by email elaine.english@local.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
10 November 2010

UNDERSTANDING...RETIREMENT BENEFITS**Course content covers:**

- 1) Final Pay Calculations**
 - The basics of final pay calculations
 - 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
 - The Internal Dispute Resolution Procedure (IDRP)

Workshop locations & dates:

06 January	London 1	Victoria Park Plaza Hotel
11 January	Birmingham	Jurys Inn Hotel
13 January	Liverpool	Marriott Hotel
18 January	Peterborough	Marriott Hotel
20 January	Leeds	Marriott Hotel
25 January	London 2	Victoria Park Plaza Hotel
27 January	Exeter	Thistle Hotel
01 February	Cardiff	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
 - Cash Equivalent Transfer Value (CETV) basis
 - Cash Equivalent Valuation (CEV) basis
(for all Pensioners and some Active and Deferred members)
5. Calculating the Pension Debit and Pension Credit
 - Calculating the Debit and recording against 'tranches' of membership
 - Future application of the Pension Debit
 - Calculation of the Pension Credit
 - Paying the Pension Credit
6. Charging
7. Death, Transfers in and Transfers out
8. The Gender Recognition Act

Workshop locations & dates:

07 February	Birmingham	Jurys Inn Hotel
09 February	Leeds	Marriott Hotel
15 February	Liverpool	Marriott Hotel
17 February	Edinburgh	Apex City Hotel
22 February	London 1	Victoria Park Plaza Hotel
24 February	Cardiff	Marriott Hotel
15 March	Exeter	Thistle Hotel
17 March	London 2	Victoria Park Plaza 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:

22 March	London 1	Victoria Park Plaza Hotel
24 March	Birmingham	Jurys Inn Hotel
29 March	Liverpool	Marriott Hotel
31 March	Cardiff	Marriott Hotel
05 April	Peterborough	Marriott Hotel
07 April	London 2	Victoria Park Plaza Hotel
12 April	Leeds	Marriott Hotel
14 April	Exeter	Thistle Hotel

Distribution sheet

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Local Government Pensions Committee
Trade unions
DCLG
COSLA
SPPA
Regional Directors
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Website

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

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