

The Local Government Pensions Committee  
Secretary: Jeff Houston

## **CIRCULAR**

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**No. 275 – JANUARY 2014**

### **LGPS PRACTITIONER AND EMPLOYER TRAINING EVENTS**

- 1) “UNDERSTANDING” WORKSHOPS**
- 2) OUTLINE TRAINING PLAN FOR 2014**

#### **Purpose of this circular:**

1. This Circular has been issued to advise administering authorities and employers participating in the Local Government Pension Scheme of a number of workshops to be run at various locations across Great Britain, and to outline our proposals for training events throughout 2014. The events have been or will be organised by the Local Government Pension Committee (LGPC).

#### **1) “UNDERSTANDING” WORKSHOPS**

##### **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. The majority of these workshops are cycled to run every 18-24 months.

3. As many of these workshops are hands-on and contain practical exercises, the “class” size is usually kept to a maximum of 15-20 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 March and April 2014 and cover the subject of ‘Employer Discretions and Policies’.
5. This subject has been covered in workshops several times over the years and most recently in March 2012. It is one of the most popular cycled events aimed at scheme employers. As a result of the introduction of the new LGPS on 1 April 2014, the content of the workshop notes is the subject of a major revision to bring the information up to date. It is hoped that the training will assist employers in complying with their legal duty to have policies in place no later than 30 June 2014.
6. In order to continue the LGPC’s plan to deliver training as locally as practicable, the forthcoming workshop is 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.
7. With reference to events for Scottish administering authorities and employers, it was agreed at Scottish Pensions Liaison Group in December 2010 that demand should be canvassed in advance of any bespoke workshops in Scotland being organised. Any such events will be arranged separately and announced directly to Scottish administering authorities and via them to employers where necessary.
8. At the Understanding workshops, delegates have the benefit of an experienced tutor and a detailed set of notes they can take away for future reference. 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 the revised course content, locations and dates can be found in **Appendix A** attached to this Circular.

### **Intended Audience for ‘Employer Discretions and Policies’**

10. These workshops are particularly aimed at 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. There are no mathematical exercises but, instead, a series of discussion items for delegates to participate in. The course might be best described as more strategic than operational.

## **Cost and booking**

11. The delegate rate for each workshop, inclusive of lunch, refreshments and all delegate materials is £210 plus VAT at the standard rate.
12. 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 Association website at <http://www.local.gov.uk/web/lgaworkforcepensions/training-and-events>
13. Please be sure to note our cancellation policy contained in our Terms and Conditions which you will be asked to confirm you have read when completing your booking details on the booking events page. You will also 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 session 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, organise overflow events.
15. If you experience any difficulties in using the on-line website booking facility, please contact Elaine English, LGPS Executive Officer, by email [elaine.english@local.gov.uk](mailto:elaine.english@local.gov.uk)

## **2) TRAINING OUTLINE PLAN FOR 2014**

16. The normally cycled LGPC training events have been interrupted, necessarily, by training events on the new pension scheme being introduced on 1 April 2014 "LGPS2014". Events aimed at employers to assist them in gearing up for the changes were performed between August and November 2013 and events for practitioners started on 9 January 2014 and are continuing (please note that these events are full).
17. Of the cycled Understanding Workshops, it is expected that post Easter we will run "Retirement Benefits", "Death and Survivor Benefits" and "Transfer Values" to take us up to August 2014. All these course notes will require major updates to cater for moving to a CARE scheme whilst protecting existing Final Salary rights. It is also anticipated there will be some new events covering new features of the pension scheme such as "Revaluation" but these are likely to come much later (as they are important but less urgent).

18. In September we intend to perform training for Scottish Authorities akin to that already performed in England and Wales, i.e. workshops for employers and separate workshops for practitioners, regarding the new LGPS for Scotland from 1 April 2015.
19. Our popular residential course "Insight" which normally runs in May and September of each year will also require a major rewrite and, because of finite resources, it is most unlikely this can be done in time for the Spring 2014 course. We do hope however, that we will be in a position to run one event, possibly two, later in the calendar year.
20. Our programme of training for elected members and others who sit on Pension Committees will feature at its normal time in the calendar i.e. October to December 2014. The popular annual "Trustees" conference is also scheduled for 19<sup>th</sup>/20<sup>th</sup> June 2014, this year in Bournemouth.
21. All events will be advertised via LGPC Circular as soon as they are arranged and, to leave some leeway for other training needs that may crop up during the year, the preceding paragraphs should be read as indicative only.

**Tim Hazlewood**  
**Pensions Training and Development Manager**  
**31 January 2014**

**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, personal tax liability, anti-discrimination laws etc) in respect of:
    - Additional Pension
    - Full or Partial Flexible Retirement
    - Requests to retire pre-60
    - Release of Deferred Benefits early
    - Waiving actuarial reductions
    - Compensation (Discretionary Payments)
  
- 3) The other areas subject to written policies
  - Under LGPS2014
  - Retained ones under LGPS2008 etc.
  - And some you probably thought dead and buried!
  
- 4) Other Discretions
  - Not subject to a policy doesn’t infer “no-cost”
  - LGPS2014 - A look at some of the many discretions available
  - LGPS2014 - Maybe why you should / maybe why you shouldn’t
  - Injury Awards

\* The LGALGPC 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:**

18 March	Liverpool	Marriott Hotel
20 March	Exeter	Rougemont [Thistle] Hotel
25 March	London	etc Venues, Westminster
27 March	Birmingham	Jurys Hotel
01 April	Peterborough	Marriott Hotel
03 April	York	Marriott Hotel
08 April	Cardiff	Marriott Hotel
10 April	London	etc Venues, Westminster

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