



The Local Government Pensions Committee
Secretary: Jeff Houston

CIRCULAR

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No. 287 – DECEMBER 2014

LGPS PRACTITIONER AND 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 a number of workshops to be run at various locations across England and Wales. The events 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. 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 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 are to be run in February and March 2015 and cover the subjects of 'The Employer Role' and 'Transfer Values'. These subjects have been covered in workshops several times over the years but are subject to significant updates for 2015, not least as a result of the introduction of the new LGPS on 1 April 2014.
5. 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.
6. As these workshops are based on the new pension scheme in England and Wales from 1 April 2014 they are unsuitable for Scottish administering authorities and employers. Topic specific workshops on 'The Employer Role' and 'Transfer Values' would only follow in 2015 at the request of the Scottish Pensions Liaison Group, with demand being canvassed in advance. Any such events would be arranged separately and announced directly to Scottish administering authorities and via them to employers where necessary.
7. 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.
8. Further details on the expected course content, locations and dates can be found in **Appendix A** attached to this Circular.

Intended Audience for 'The Employer Role'

9. These workshops are aimed primarily at staff working for scheme employers in England and Wales who have operational responsibilities under the Local Government Pension Scheme (LGPS). Delegates do not necessarily need a thorough working knowledge of the LGPS itself but some experience of the scheme and its provisions would be useful.

Intended Audience for 'Transfer Values'

10. These workshops are primarily aimed at Administering Authority staff in England and Wales who deal with, or need to learn about, cash equivalent transfer values (Club and non-Club), inter-fund adjustments and aggregation. It is improbable that scheme employer staff would benefit by attending.

Cost and booking

11. The delegate rate for each workshop, inclusive of lunch, refreshments and all delegate materials is £220 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/lgapensions/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. Please also note that from May 2015 a new event system will be in place whereby all events must be paid for in advance via credit card.
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

Tim Hazlewood
Pensions Training and Development Manager
5 December 2014

Appendix A

UNDERSTANDING...THE EMPLOYER ROLE

Course content covers:

1) Joining the LGPS

Contractual enrolment and Auto-enrolment
One Scheme, two sections

2) CARE vs Final Pay

Pensionable pay (actual and assumed)
CARE accounts – how they work
The basics of final pay calculations for pre-14 membership

3) Absences

Child-related leave, authorised and unauthorised absences, strikes etc.

4) Additional Contributions

Additional Pension Contributions / Additional Voluntary Contributions

5) Regulatory Requirements

What you must do by law for your employees

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)

** This is not a comprehensive look at employer discretions. There is a separate dedicated workshop called 'Employer Discretions and Policies' that covers this in depth.*

Workshop dates, locations & venues:

03 February	Cardiff	Marriott Hotel
05 February	Birmingham	Jurys Hotel
10 February	London	Layden House
12 February	Peterborough	Marriott Hotel
17 February	Liverpool	Marriott Hotel
19 February	Exeter	Rougemont [Thistle] Hotel
24 February	York	Marriott Hotel

UNDERSTANDING... TRANSFER VALUES

Course content covers:

1. The Governing Legislation

2. Inter-Fund Adjustments

Options for aggregation
Administration
Methodology

3. Transfers Out

Overriding provisions and deadlines
Public Sector Transfer Club
Calculation Methodology
Accrued rights
GMPs
Protected, Unprotected and Taper membership
QROPS and Pension Liberation

4. Transfers In

Administration, deadlines and consequences
Pre/Post 1/4/14 relevant dates
From Club Schemes
From non-Club Schemes
More than a calculation!
Considerations on decision whether to transfer

5. Bulk Transfer Arrangements

A brief look at the differences

6. CEVs for Pension Sharing on Divorce (PSoD)

A brief look at the methodology*

* *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 dates, locations & venues:

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05 March	Exeter	Rougemont [Thistle] Hotel
10 March	London	Layden House
12 March	Peterborough	Marriott Hotel
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Distribution sheet

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