

The Local Government Pensions Committee
Secretary: Jeff Houston

CIRCULAR

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No. 290 – MARCH 2015

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 last topic-specific Understanding workshops were run in February and March 2015 and covered the subjects of 'The Employer Role' and 'Transfer Values'. Due to their popularity, some overflow courses have been scheduled for April 2015 – these have already been made available to persons on the "waitlist" and are now generally available for booking. The next topic-specific Understanding workshops are to be run in July 2015 and cover the subject of 'Pensions on Divorce'. All 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 Divorce workshops are to be held in a number of locations across the country. In putting together the 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 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.

Intended Audience for 'Pensions on Divorce'

11. These workshops are primarily aimed at Administering Authority staff in England and Wales 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 scheme employer staff would benefit by attending.

Cost and booking

12. The delegate rate for each workshop, inclusive of lunch, refreshments and all delegate materials is £230 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 Association website each event has a link attached to the date in order to book direct. The main events booking page for all LGA events are viewable at: <http://www.local.gov.uk/events>
14. 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
30 March 2015

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.*

Extra workshop dates, locations & venues:

16 April	London	Layden House, Farringdon
21 April	York	Marriott Hotel
28 April	Cardiff	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*

Extra workshop date, location & venue:

[23 April](#)

London

Layden House, Farringdon

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:

02 July	Exeter	Rougemont [Thistle] Hotel
07 July	Liverpool	Marriott Hotel
09 July	London	Local Government House
14 July	Cardiff	Marriott Hotel
16 July	Birmingham	Jurys Inn Hotel
21 July	York	Marriott Hotel
23 July	Peterborough	Marriott Hotel

Distribution sheet

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DCLG
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