

## LGPC Bulletin 208 – March 2021

Local Government Pensions Committee (LGPC)  
Secretary, Lorraine Bennett

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### Foreword

This bulletin contains important updates for administering authorities, scheme employers and software suppliers. It also provides a general update for all LGPS stakeholders.

This bulletin contains important articles on:

- [Exit payment reform](#)
- [SPPA Circular 2021/02 – Tiered contribution rates](#)
- [Countdown bulletin 54](#)

which need action by certain stakeholders.

If you have any comments or articles for future bulletins, please contact [query.lgps@local.gov.uk](mailto:query.lgps@local.gov.uk).

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## LGPS England & Wales Scheme Advisory Board

### Chair's statement on the RIAG

The newly established Responsible Investment Advisory Group (RIAG) met for the first time on 3 March 2021. It discussed a wide range of responsible investment related issues, including the Ministry for Housing, Communities and Local Government's (MHCLG's) proposals for Task Force on Climate-related Financial Disclosures (TCFD) reporting within the LGPS and the response to the LGPS All Party Parliamentary Group's inquiry into a "Just Transition".

The main role of the group will be to advise the Scheme Advisory Board (SAB) and the Investment Committee on all matters relating to responsible investment. It will also be responsible for assisting the SAB in developing and maintaining the online Responsible Investment A to Z website, which is expected to go live at the end of March 2021. The group will continue to meet on a six weekly cycle and will report directly to the Investment Committee.

### Employer flexibilities

Further to the article in [bulletin 206](#), on 2 March 2021, the MHCLG published [statutory guidance on employer flexibilities](#). The purpose of the guidance is to assist administering authorities and Scheme employers implement and operate the new employer flexibilities regulations. The SAB has also published its [Guide to Employer Flexibilities](#) that should be read in conjunction with the statutory guidance.

### Exit payment reform

In [bulletin 206](#) we updated you on the latest position on exit payment reform. On 4 March 2021, [MHCLG issued a letter to administering authorities and council chief executives](#) withdrawing their [earlier letter dated 28 October 2020](#). This latest letter confirms there will be no amendments to the LGPS following their recent [consultation on reforming local government exit pay](#). MHCLG confirms they will consult again before they make any regulation changes.

You can read the latest information about exit payment reform, including the SAB's comments on the letter from MHCLG, on the [Public Sector Exit Payments page](#) of the SAB's website.

### Looking ahead

The Government indicates that it intends to reintroduce measures to limit public sector exit payments 'at pace'. Our expectation is that the exit payment cap and amendment to the LGPS will be introduced at the same time, to avoid a repeat of the legal uncertainty.

Administering authorities should continue to provide strain cost estimates for future redundancies or business efficiency exits to employers. We recommend that you include warnings about possible future reforms to exit payments when you provide these estimates.

### **Useful resources**

The Local Government Association (LGA) and the SAB have produced various resources to help employers and administering authorities navigate the exit payment reforms. The guides are updated to reflect the latest changes on 10 March 2021.

- the [Public Sector Exit Payments](#) page of the SAB website
- exit cap information note for administering authorities that you can find on the [Administrator guides and documents](#) page of [www.lgpsregs.org](http://www.lgpsregs.org)
- exit cap information note for employers that you can find on the [Employer guides and documents](#) page of [www.lgpsregs.org](http://www.lgpsregs.org)
- [Public sector exit cap](#) page of [www.lgpsmember.org](http://www.lgpsmember.org), which replaces the member frequently asked questions
- the [Reform of Local Government Exit Payments](#) page of the LGA website
- the [Non-scheme consultation](#) page of [www.lgpsregs.org](http://www.lgpsregs.org)
- the [Scheme consultations](#) page of [www.lgpsregs.org](http://www.lgpsregs.org)
- the [Related legislation](#) page of [www.lgpsregs.org](http://www.lgpsregs.org).

### **Remote meetings legislation will not be extended**

The minister responsible for the LGPS, Luke Hall MP, [wrote to councils on 25 March 2021 explaining that the legislation allowing remote meetings will not be extended](#) beyond 7 May 2021. The letter sets out the different options available to councils and provides a link to the [Government's guidance for the safe use of council buildings](#).

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## **LGPS England & Wales**

### **New video on transferring out**

We have produced a new video in the 'Pensions made simple' series called 'Transferring your pension'. The video provides information about what members should consider if they are thinking about transferring their pension to a defined contribution scheme.

The video is available in English and Welsh and can be viewed on the [video page of the member website](#). The videos are hosted on Vimeo. If you want to embed the

videos on your fund's website the code to do this is available at <https://www.lgpsregs.org/resources/calccode.php>

We would like to thank the Communications Working Group for their input.

### **The Northamptonshire (Structural Changes) (Supplementary Provision and Amendment) Order 2021**

On 1 April 2021, new single tier unitary councils called North Northamptonshire Council and West Northamptonshire Council will be the sole local authorities for the local government areas of North Northamptonshire and West Northamptonshire. These will replace Northamptonshire County Council, Corby Borough Council, Daventry District Council, East Northamptonshire District Council, Kettering Borough Council, Northampton Borough Council, South Northamptonshire District Council and Wellingborough Borough Council.

[The Order](#), which comes into force on 1 April 2021, deals with the pension implications. For example, the LGPS fund maintained by Northamptonshire County Council will move to the newly created West Northamptonshire Council. On the termination of the councils set out in the last paragraph, no exit payment / credit will become due and the assets and liabilities of those councils will be allocated between the two new unitary councils.

We will update [the timeline regulations](#) in due course.

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## **LGPS Scotland**

### **GAD guidance – Purchase of Additional Survivor Benefits**

On 26 March 2021, Roddy MacLeod from the Scottish Public Pensions Agency (SPPA) emailed administering authorities telling them about the amended GAD guidance on purchasing additional survivor benefits.

The amended guidance incorporates the factors that took effect from 25 February 2020 and makes other minor changes concerning regulatory references. Administering authorities should have already recalculated the rates due from 1 April 2020 for existing contracts.

You can find the guidance on the [Actuarial guidance page](#) of the [SPPA website](#) and on the [Actuarial guidance page](#) of [www.scotlgpsregs.org](http://www.scotlgpsregs.org).

### **SPPA Circular 2021/02 – Tiered contribution rates**

On 10 March 2021, the SPPA circulated tiered contribution rates and guidance for 2021/22. Both the circular and guidance are available to view on the [SPPA circulars and guidance page](#) of [www.scotlgpsregs.org](http://www.scotlgpsregs.org).

### **Action for administering authorities**

Please share this information with your Scheme employers.

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## **HMRC**

### **Countdown bulletin 54**

On 25 March 2021, [HM Revenue and Customs \(HMRC\) published countdown bulletin 54](#) providing an update on the issuing of final data cuts to pension scheme administrators.

HMRC completed the issue of final data cuts by the end of July 2020. However, they were unable to issue data cuts to those schemes with nil output or where they were unable to trace the scheme administrator.

If your administering authority has not received its final data cut, please contact the customer relationship team by email to [CRM.schemereconciliationservice@hmrc.gov.uk](mailto:CRM.schemereconciliationservice@hmrc.gov.uk).

The deadline for requesting the final data cut is 31 July 2021.

HMRC will only issue final data cuts to:

- schemes that engaged with the scheme reconciliation service
- ceased schemes with an ongoing file in the scheme cessation area in April 2018.

### **Action for administering authorities**

If you have not received your final data cut, and you are not excluded from receipt, please contact [CRM.schemereconciliationservice@hmrc.gov.uk](mailto:CRM.schemereconciliationservice@hmrc.gov.uk) as soon as possible.

### **Managing pension schemes service newsletter**

On 19 March 2021, Rachel Abbey forwarded an email to administering authorities in England, Northern Ireland, Scotland and Wales on behalf of HMRC. The email confirmed publication of the [Managing pension schemes service newsletter - March 2021](#).

The newsletter contains information about the migration of the Pension schemes online service to the Managing pension schemes service and how users can prepare for this.

Please contact [teresa.bartram@hmrc.gov.uk](mailto:teresa.bartram@hmrc.gov.uk) if you would like to:

- express your interest in attending a virtual event to discuss the migration
- raise any specific questions about the migration at the virtual event
- suggest another way that you could provide feedback.

### **Pension schemes newsletter**

On 4 March 2021, HMRC published [pension schemes newsletter 128](#). Articles include:

- no changes to the annual allowance
- lifetime allowance frozen until April 2026
- changes to processes due to COVID-19 extended until 30 June 2021 (though HMRC has confirmed in an email to us that this doesn't apply to the accounting for tax return for the quarter ending on 30 June 2021 (due by 14 August 2021), so penalties / interest will apply if paid late)
- new features on the Managing pension schemes service available from 16 March 2021.

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## **HMT**

### **PSPS GMP indexation consultation – Government response**

On 23 March 2021, Jayne Wiberg emailed stakeholders notifying them that [the Government has published its response to the consultation on Guaranteed Minimum Pension \(GMP\) Indexation in Public Service Pension Schemes \(PSPS\)](#). For background information, please see the article in [bulletin 203](#).

The response concludes that the Government has decided to discount conversion as a long-term policy solution and make the interim solution the permanent solution for GMP indexation in PSPS. This approach will mean that PSPS will be directed to provide full indexation to those members (including survivors) with a GMP (or inherited GMP in the case of a survivor), reaching State Pension age (SPa) beyond 5 April 2021.

The accompanying HM Treasury Direction (issued under section 59A of the Social Security Pensions Act 1975) is being finalised and will be published by HM Treasury shortly. The Northern Ireland Executive will now need to decide how to proceed on



this matter. To date, the GMP in Northern Ireland public service pension schemes has been treated in the same way as in the public service pension schemes in Great Britain. Indexation of GMP is applied in an identical manner under an equivalent direction made by the Department of Finance under section 69 and section 69A of the Social Security Pensions (Northern Ireland) Order 1975 (read with the Pensions (Increase) Act (Northern Ireland) 1971).

Meanwhile administering authorities in England, Wales and Scotland should apply an increase of 0.5 per cent:

- on 6 April 2021 to the post-5 April 1988 GMP element of a pension in payment (by way of the GMP Increase Order 2021 [SI2021/163]), and
- on 12 April 2021 to the pre-6 April 1988 GMP element of a pension in payment (by way of the Pensions Increase (Review) Order 2021 [SI2021/275]) if the individual reached SPa after 5 April 2016, provided the member's pension increase (PI) date is before 6 April 2020. If the individual reached SPa after 5 April 2016 and their PI date is after 5 April 2020, then a pro-rata increase will apply to the pre-6 April 1988 GMP element of their pension in payment.

'The application of increases to LGPS pensions in payment technical guide' (found in the Administrator guides and documents pages of [www.lgpsregs.org](http://www.lgpsregs.org) and [www.scotlgpsregs.org](http://www.scotlgpsregs.org)) will be updated in due course to reflect the final position. Though there will be no changes to any of the examples as the examples already assumed that the interim solution would become the permanent solution for ease of explanation.

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## DWP

### **Government consultation to increase the General Levy**

In [bulletin 205](#) we let you know that the Department for Work and Pensions (DWP) launched [a consultation into the General Levy rates](#). The consultation closed on 27 January 2021.

The Government responded to the consultation on 4 March 2021 and laid the [Occupational and Personal Pension Schemes \(General Levy\) \(Amendment\) Regulations 2021](#) [SI2021/214]. The Regulations come into force on 1 April 2021 and confirm the increased rates that will apply for the next three years. The Regulations apply in England, Wales and Scotland. DWP pays the levy on behalf of public service pension schemes.

[The Occupational and Personal Pension Schemes \(General Levy\)\(Amendment\) Regulations \(Northern Ireland\) 2021](#) [SI 2021/60] make equivalent changes in Northern Ireland.

### **Pensions Minister calls for schemes to join industry forum**

On 11 March 2021, the Pensions Minister Guy Opperman, [wrote to about 90 different schemes](#), encouraging them to join the Pension Scams Industry Forum.

The Forum is a voluntary industry group that meets monthly to discuss pension scams threats and trends. There are currently 51 organisations participating and the data is used to inform Project Bloom, a multi-agency taskforce which coordinates efforts to combat scams.

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## **TPO**

### **Panels and Independent Financial Advisers guidance**

On 18 March 2021, the Pensions Ombudsman (TPO) published its [Panels and Independent Financial Advisers](#) guidance.

Historically, pension scheme administrators, trustees and employers have expressed concern about the scope of their responsibilities in providing financial advice to members and have hesitated in recommending or facilitating access to particular financial advisers. TPO's guidance on this topic sets out its approach to the provision of factual information in respect of independent financial advisers.

Anthony Arter, Pensions Ombudsman said:

“In these complex and challenging times, it is important that scheme members know where to turn for help when they are considering their pension options and/or are planning for their retirement. Obtaining independent financial advice is not always easy for members of pension schemes. Pension schemes have difficult decisions to make when they disseminate complex information. I am often asked for my views where a scheme ponders establishing a panel of independent financial advisers. My office has set out some information to assist schemes and their members, which I hope will be helpful.”

At the meeting of the National LGPS Technical Group on 5 March 2021, the group discussed the possibility of administering authorities having access to a panel of independent financial advisers ([see item 19 of the minutes](#)). The group has asked the Scheme Advisory Board (SAB) in England and Wales to consider this matter. Discussions are currently underway between the SAB and the National LGPS

Frameworks, on the feasibility of an Independent Financial Advice framework. This would be for providers who are willing to undergo LGPS specific training.

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## TPR

### Corporate strategy

On 10 March 2021, [the Pensions Regulator \(TPR\) published a blueprint for the future of pensions regulation setting out its 15-year vision to protect savers](#).

TPR's Corporate Strategy reflects a fundamental shift in pension saving in the UK and also focuses on the short-term challenge of protecting millions of savers as the country recovers from the COVID-19 pandemic. It contains five key priorities:

- security, protecting the money that savers invest in pensions
- value for money
- scrutiny of decision making
- embracing innovation
- bold and innovative regulation.

### Criminal sanctions consultation

On 11 March 2021, TPR commenced [a consultation on its new criminal sanctions policy](#). The policy sets out how TPR will use its new criminal offence powers to investigate and prosecute those who avoid employer debts to pension schemes or put savers' pensions at risk. The consultation closes on 22 April 2021.

### Guide published on providing support on financial matters

On 30 March 2021, TPR and the Financial Conduct Authority (FCA) jointly published a '[Guide for employers and trustees on providing support with financial matters without needing to be subject to FCA regulation](#)'.

The guide gives information on the things employers and pension schemes can do to support their members with financial matters without needing to be authorised by the FCA. The guide also covers things which could require FCA authorisation.

### New code of practice consultation

On 17 March 2021, [TPR launched its New Code of Practice consultation](#). The consultation closes on 26 May 2021.

The draft new code consolidates (with updates and amendments) most of the existing codes of practice (including the public service code of practice 14) into a [new online code](#) providing a single up-to-date and consistent source of information.

The other codes will be consolidated into the single code at a later date, subject to further consultation.

TPR will also be carrying out a series of engagement activities to provide more details about the new code and hear views from industry experts, including [a virtual workshop](#) at the end of April 2021.

We will be responding to the consultation in due course and will share our response in advance of the closing date.

### **Pension funds to step up reporting to stop scammers**

On 25 March 2021, [TPR called on the pensions industry to raise the alarm over suspected scams](#), following a concerning long-term drop in reporting.

Data from the national fraud and cybercrime reporting centre, Action Fraud, shows a steady fall in pension scam reports from 1,788 in 2014 to 358 in 2020, an almost 80 per cent reduction.

While there has been a slight rise in reporting so far in 2021, TPR is calling on the industry to be on high alert for criminal or suspicious activity and to sign up to its [Pledge campaign to help combat pension scams](#) (see [bulletin 204](#) for further information).

### **Strengthening powers**

On 18 March 2021, [TPR published a consultation seeking views on the proposed drafting of two sets of regulations concerning TPR powers, following changes introduced by the Pension Schemes Act 2021](#). The consultation closes on 29 April 2021. Occupational pensions policy is a devolved matter for Northern Ireland. It is anticipated that Northern Ireland will make corresponding regulations.

The draft regulations, expected to come into force in October 2021, are:

- The Pensions Regulator (Contribution Notices) (Amendment) Regulations 2021 which introduce the ‘employer resources test’ making powers to prescribe how the resources of a sponsoring employer are to be determined. This will provide an alternative test, which will work alongside the existing regime, to assess whether an act or failure to act has occurred for determining whether a section 38 Contribution Notice can be issued.
- The Pensions Regulator (Information Gathering Powers and Miscellaneous Amendments) Regulations 2021. These regulations prescribe the information that interview notices should contain, modifies how inspection powers may

be utilised in multi-employer schemes and sets out the fixed or escalating penalty rates for non-compliance with information gathering requests.

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## Other news and updates

### Budget 2021

The Chancellor, Rishi Sunak, delivered the Budget on 3 March 2021. The main areas affecting pensions are mentioned below:

#### Lifetime allowance frozen until 2026

The lifetime allowance is frozen at £1,073,100 until the end of the 2025/26 tax year. As the allowance is not reducing, the Government has confirmed there is no need for transitional protection.

#### No response on Pensions Tax Administration Call for Evidence

There was no response to the Pensions Tax Administration Call for Evidence. During the summer of 2020, the Government sought views on how different methods of tax relief operated by pension schemes affect the take-home pay of low-earning individuals. [Bulletin 203](#) contains further information.

#### Consultation on charge cap announced

The Government announced they will publish a consultation on whether certain costs within the charge cap affect pension schemes' ability to invest in a broader range of assets. [The consultation was published on 19 March 2021](#). In due course, the Department for Work and Pensions will publish draft regulations to smooth out certain performance over a multi-year period.

#### First green gilt to be launched later in 2021

The Government will issue its first sovereign green bond in the summer of 2021. A green gilt framework will be published in June 2021, detailing the types of expenditure that will be financed. A UK Infrastructure Bank will be launched this year, as will a green retail savings product through National Savings and Investments in the summer.

#### Bulletin 207 - annual update

On 19 March 2021, we published Bulletin 207 containing the annual updates. You can find the bulletin on the [LGPC Bulletins](#) page of [www.lgpsregs.org](http://www.lgpsregs.org) and the [LGPC Bulletins](#) page of [www.scotlgpsregs.org](http://www.scotlgpsregs.org).

You can also find links to the legislation related to the annual updates in the Annual update Statutory Instruments section of the [Related legislation](#) page of [www.lgpsregs.org](http://www.lgpsregs.org) or the [Related legislation](#) page of [www.scotlgpsregs.org](http://www.scotlgpsregs.org).

## **CJRS extended**

On 3 March 2021, the Government announced an extension to the Coronavirus Job Retention Scheme (CJRS), which is now set to end on 30 September 2021. Under the scheme, furloughed employees receive 80 per cent of their current salary for hours not worked, up to a maximum of £2,500 per month. Up to the end of June, the Government will fund the entire amount. In July, the employer will fund 10 per cent. In August and September, the employer will fund 20 per cent. Also, employers must cover National Insurance and employer pension contributions for hours not worked.

## **Communications working group**

The group met virtually on 9 March 2021 and discussed:

- the new member website
- digital engagement guide
- McCloud and the exit cap
- annual work plan for 2021/22.

The minutes will be published shortly on the [Communications working group page](#) of [www.lgpsregs.org](http://www.lgpsregs.org) and the [Communications working group page](#) of [www.scotlgpsregs.org](http://www.scotlgpsregs.org).

## **DSARs quick pensions guide**

Administering authorities might find the Squire Patton Boggs '[pensions quick guide to Data Subject Access Requests](#)' (DSARS) useful when responding to requests from claims management companies. It sets out the legislation administering authorities must follow, together with some practical 'dos and don'ts'.

## **Local Government Pensions Committee**

The Committee met virtually on 8 February 2021 and discussed:

- exit payments
- McCloud
- good governance project
- responsible investment
- employer flexibilities.

Draft minutes of the meeting can be found on the [LGPC meeting page](#) of [www.lgpsregs.org](http://www.lgpsregs.org) and the [LGPC meeting page](#) of [www.scotlgpsregs.org](http://www.scotlgpsregs.org).

## **LGPS mortality data**

On 28 January 2021, the Scheme Advisory Board in England and Wales published LGPS mortality data to the end of November 2020. The data covers all LGPS

administering authorities in England, Wales, Scotland and Northern Ireland and can be found on the [SAB COVID-19 Mortality page](#). It shows the total deaths as a percentage of pensioner membership and does not account for cause of death.

### **MaPS reveals plans to launch MoneyHelper**

On 18 March 2021, the Money and Pensions Service (MaPS) revealed plans to launch [a single offering for consumers called MoneyHelper](#). This will replace the Money Advice Service, the Pensions Advisory Service and Pension Wise. Pension Wise will continue as a named service under the MoneyHelper umbrella.

MoneyHelper will bring all three legacy brands and services together in one place, providing a single destination for money and pensions guidance. It is due to be launched by MaPS in the summer of 2021.

### **McCloud data collection**

We would like to remind you that in July 2020, the McCloud implementation group produced a collection of documents to assist administering authorities with the process of collecting the historical data they will need to calculate the underpin:

- data collection – key points for employers
- data collection – questions and answers for employers
- data collection guide for administrators
- Standard data collection template and notes.

You can find the documents on the [Administrator guides and documents page](#) of [www.lgpsregs.org](http://www.lgpsregs.org) and the [Administrator guides and documents](#) page of [www.scotlgpsregs.org](http://www.scotlgpsregs.org).

The McCloud implementation group is made up of representatives from the Local Government Association, Scottish Public Pensions Agency, Northern Ireland Local Government Officers Superannuation Committee, administering authorities, actuaries and software suppliers. The group recommended that administering authorities collect hours and service break data for all those with scheme membership after 31 March 2014 (31 March 2015 for Scotland and Northern Ireland). If a member was not in the scheme in an employment on 31 March 2012, they may still qualify for protection if a pension transfer or interfund takes place. The [Scheme Advisory Board in England and Wales sought legal advice](#) about the lawful basis on which administering authorities could rely when collecting and storing remedy data from employers.

### **National LGPS Frameworks**

## **Launch of the Global Custody Services Framework**

The Global Custody Services Framework is now available for use by all LGPS Funds and Pools (and other public sector schemes).

If you would like copies of the supporting documentation (including provider catalogues and guidance notes) please email the National LGPS Frameworks team: [NationalLGPSframeworks@norfolk.gov.uk](mailto:NationalLGPSframeworks@norfolk.gov.uk). You can also access information on the [National LGPS Frameworks website](#).

## **Re-let of the Stewardship Advisory Services**

The current National LGPS Framework for Stewardship Advisory Services is due to expire in October 2021. This is a very important area and the Frameworks are very keen to begin the re-let as soon as possible and are looking for volunteers to be Founders.

The market has developed since the previous framework and the expertise of practitioners in helping to shape an appropriate lot structure containing services that are relevant to the LGPS Funds and Pools going forward is invaluable.

If you are able to help shape this replacement framework by acting as a Founder, the National LGPS Frameworks would be glad to hear from you (even if you are unable to act as a Founder on this occasion). An initial meeting is planned for towards the middle/end April 2021 with a view to having a replacement framework in place by early 2022.

If you would like to know more about what being a Founder involves or have any other queries, please contact:

- [jo.quarterman@norfolk.gov.uk](mailto:jo.quarterman@norfolk.gov.uk) (telephone: 01603 223950)
- [leon.thorpe@norfolk.gov.uk](mailto:leon.thorpe@norfolk.gov.uk) (telephone: 01603 495922).

## **National LGPS Technical Group**

The group met virtually on 5 March 2021 and discussed:

- McCloud
- Exit Payments
- Claims Management Companies and Independent Financial Advisers
- Additional Voluntary Contributions
- Pensions Ombudsman guidance.



Minutes of the meeting can be found on the [Technical Group page](#) of [www.lgpsregs.org](http://www.lgpsregs.org) and the [Technical Group page](#) of [www.scotlgpsregs.org](http://www.scotlgpsregs.org).

### **Non-club transfer out technical guide**

On 23 March 2021, Jayne Wiberg let you know that we had published clean and tracked changes version 1.1 of the Non-club transfer out technical guide. This can be found in the Administrator guides and documents pages of [www.lgpsregs.org](http://www.lgpsregs.org) and [www.scotlgpsregs.org](http://www.scotlgpsregs.org), under Transfers Out.

Since initial publication on 15 February 2021 we have made a number of minor amendments to the guide:

- Amended the paragraph titled ‘What happens if the member disputes the value of a cash equivalent transfer value?’ to make clear that where a dispute occurs, the statutory timescales for a member to make an election to transfer and for the administering authority to pay the transfer are automatically extended.
- Amended the paragraph titled ‘When is a member entitled to a cash transfer sum (CTS)’ to make clear that only members who leave active membership of the LGPS after 31 March 2008 in England and Wales, or after 5 April 2006 in Scotland, are entitled to a cash transfer sum providing they meet the qualifying conditions.
- Inserted a new paragraph titled ‘What are the qualifying conditions a member must meet to be entitled to a CTS?’.
- Made minor amendments to section 10 (Regulatory references).

### **PASA launches Data Management Plan guidance**

On 22 March 2021, the Pensions Administration Standards Association (PASA) launched its [Data Management Plan guidance](#).

The guidance sets out, at a high level, the purpose of a data management plan and the information which it may be expected to include such as processing, security and improvement. PASA encourages all trustees to review the completeness, accuracy and appropriateness of their data and integrate a data management plan as part of their wider risk management framework.

### **Pensions Dashboards**

## **Blogs**

On 12 March 2021, [the Pensions Dashboards Programme \(PDP\) released a blog](#) reporting on the progress made in creating an onboarding strategy and what pension providers need to do next.

## **Call for Input**

On 18 February 2021, the Pensions Dashboards Programme (PDP) published a [Call for Input from data providers on the identity approach](#). The Call for Input closes on 2 April 2021.

The Local Government Association responded on 12 March 2021. You can find the response on the [Non-scheme consultations page](#) of [www.lgpsregs.org](http://www.lgpsregs.org) and the [Non-scheme consultations page](#) of [www.scotlgpsregs.org](http://www.scotlgpsregs.org).

## **PASA publishes guidance**

In March 2021, the Pensions Administration Standards Association (PASA) published [guidance on how to start getting ready for pensions dashboards](#). This is the first of a series of releases of PASA guidance for UK pension schemes, trustees and providers on how to start getting ready for pensions dashboards.

## **Public sector website accessibility**

Existing websites of public sector bodies that were published before 23 September 2018 must comply with the [Public Sector Bodies \(Websites and Mobile Applications\) \(No. 2\) Accessibility Regulations 2018](#) from 23 September 2020.

Websites published or substantially changed on or after 23 September 2018 must have complied since 23 September 2019. Mobile apps must comply from 23 June 2021.

We provided information about the regulations in [Bulletin 190](#).

Regulation 8 requires public sector bodies to publish an accessibility statement and keep that statement under regular review. The Government has published [a sample accessibility statement \(for a fictional public sector website\)](#) on [www.gov.uk](http://www.gov.uk).

If you plan to publish a portable document format (PDF) version of any of our scheme guides and factsheets, you may need to take additional steps to ensure that they are compliant. You can find more information online about:

- how to [create accessible PDFs](#)
- [creating accessible PDFs in Adobe Acrobat](#).

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## Training

### Practitioner and employer training in 2021

We will be delivering one day practitioner training courses covering Aggregation and Transfers in 2021. Aggregation is fully booked. We are operating a waiting list and plan to schedule additional dates. Places are currently available on the Transfers course on 29 June, 1 July, 5 July and 8 July.

We are also delivering Employer role training. We have already added extra dates for this popular course and further dates will be scheduled for those on the waiting list in the Autumn.

Please visit the [Local Government Association events page](#) for details of training courses that are currently open for booking. Use the 'Filter by topics' field to select Pension events.

If you are not able to book a place on your chosen course, please email [elaine.english@local.gov.uk](mailto:elaine.english@local.gov.uk) and let her know which course you wish to attend.

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## Legislation

### Statutory Instruments

The [Occupational and Personal Pension Schemes \(General Levy\) \(Amendment\) Regulations 2021](#) [Statutory Instrument 2021/214].

[The Northamptonshire \(Structural Changes\) \(Supplementary Provision and Amendment\) Order 2021](#) [Statutory Instrument 2021/272].

See [bulletin 207](#) for the annual update statutory instruments.

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## Useful links

[LGA Pensions page](#)

[LGPS member website \(England and Wales\)](#)

[LGPS member website \(Scotland 2015\)](#)

[LGPS Advisory Board website \(England and Wales\)](#)

[LGPS Advisory Board website \(Scotland\)](#)

[LGPS Regulations and Guidance website \(England and Wales\)](#)

[LGPS Regulations and Guidance website \(Scotland\)](#)

[Public Sector Transfer Club](#)

[Recognised Overseas Pension Schemes](#) that have told HM Revenue and Customs that they meet the conditions to be a Recognised Overseas Pension Scheme and have asked to be included on the list.

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## **LGPS pensions section contact details**

If you have a technical query, please email [query.lgps@local.gov.uk](mailto:query.lgps@local.gov.uk) and one of the team's LGPS pension advisers will get back to you.

### **Jeff Houston (Head of Pensions)**

Telephone: 07786 681936

Email: [jeff.houston@local.gov.uk](mailto:jeff.houston@local.gov.uk)

### **Lorraine Bennett (Senior Pensions Adviser – LGPC Secretariat)**

Telephone: 07766 252847

Email: [lorraine.bennett@local.gov.uk](mailto:lorraine.bennett@local.gov.uk)

### **Jayne Wiberg (Pensions Adviser – LGPC Secretariat)**

Telephone: 07979 715825

Email: [jayne.wiberg@local.gov.uk](mailto:jayne.wiberg@local.gov.uk)

### **Rachel Abbey (Pensions Adviser – LGPC Secretariat)**

Telephone: 07827 307003

Email: [rachel.abbey@local.gov.uk](mailto:rachel.abbey@local.gov.uk)

### **Steven Moseley (Pensions Adviser – LGPC Secretariat)**

Telephone: 07780 227059

Email: [steven.moseley@local.gov.uk](mailto:steven.moseley@local.gov.uk)

### **Karl White (Pensions Adviser (Training) – LGPC Secretariat)**

Telephone: 07464 652886

Email: [karl.white@local.gov.uk](mailto:karl.white@local.gov.uk)

### **Bob Holloway (Pensions Secretary – LGPS Scheme Advisory Board (E&W))**

Telephone: 07919 562847

Email: [robert.holloway@local.gov.uk](mailto:robert.holloway@local.gov.uk)

**Joanne Donnelly (Senior Pensions Secretary – LGPS Scheme Advisory Board (E&W))**

Telephone: 07464 532613

Email: [joanne.donnelly@local.gov.uk](mailto:joanne.donnelly@local.gov.uk)

**Liam Robson (Pensions Analyst – LGPS Scheme Advisory Board (E&W))**

Telephone: 0207 664 3328

Email: [liam.robson@local.gov.uk](mailto:liam.robson@local.gov.uk)

**Elaine English (LGPS Executive Officer)**

Telephone: 07909 988968

Email: [elaine.english@local.gov.uk](mailto:elaine.english@local.gov.uk)

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## Further information

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