

LGPC Bulletin 243 – October 2023

This bulletin contains updates for all LGPS stakeholders. It includes important articles on:

- SCAPE discount rate and actuarial factors fourth batch – apply the new factors in accordance with the transitional arrangements table for [England & Wales](#) and [Scotland](#)
- [McCloud compensation cases](#) (England and Wales) – send depersonalised details to DLUHC
- [McCloud survey](#) – complete the survey by 23 November 2023
- [Interfund transfers and the underpin](#) - apply the approach set out by DLUHC and SPPA for interfund transfers
- [Templates for member correspondence and disclosure article](#) – use the templates in member correspondence and disclosure article when telling members about the changes
- [Pensions Dashboards survey](#) – complete the survey by 23 November 2023.

which need action by certain stakeholders.

If you have any comments or articles for future bulletins, please contact query.lgps@local.gov.uk.

Index

Local Government Association	4
Recruiting for a Programme Support Officer	4
LGPS England & Wales Scheme Advisory Board (SAB)	4
Academy conversions guidance	4
DLUHC consultation on investment reforms	4
Knowledge and Skills survey	5
LGPS-Live – 1 November	5
Website	5

Your LGPS contacts – stay connected.....	5
LGPS England & Wales.....	6
LGPS statistics for 2022/23 published	6
SCAPE discount rate and actuarial factors – fourth batch	6
LGPS Scotland	8
SAB annual report 2021/22.....	8
SCAPE discount rate and actuarial factors – fourth batch	8
HMRC.....	9
Newsletter 153.....	9
Public service pensions remedy newsletter	10
McCloud	10
Compensation cases.....	10
Dedicated areas of member websites.....	10
Initial prioritisation policy	11
Interfund transfers and the underpin	11
McCloud survey	12
Teachers’ excess service – TPS communications in England and Wales	13
Templates for member correspondence and disclosure article.....	13
Timeline regulations.....	14
Pensions dashboards.....	14
Blog on common questions.....	14
Dashboards survey.....	14
National LGPS Technical Group – AVCs and dashboards	15
PDP connection forum	15
PDP webinar	16
TPR blog on dashboard checklist	16
TPO.....	16
October 2023 update	16
Other news and updates	16
Member website receives accessibility accreditation	16

Club memorandum.....	16
National LGPS Technical Group minutes published	17
September 2023 CPI rate announced.....	18
Training	18
2024 LGPS Governance Conference.....	18
2024 training programme	18
Wider landscape	19
New CEO at Money and Pensions Service (MaPS).....	19
Teachers Pension Scheme grant guidance updated	19
Legislation.....	19
Northern Ireland Statutory Instruments	19
Useful links	19
LGPS pensions section.....	20
Raising a query	20
Team contacts	20
Further information.....	21
Copyright.....	21
Disclaimer	21

Local Government Association

Recruiting for a Programme Support Officer

We are recruiting for a Programme Support Officer. This is an administrative support role which can be home, or office (London) based. The closing date for applications is 8 November 2023. Interviews will be held the week commencing 13 November 2023.

For more information and to apply see [the Jobtrain website](#).

Contact [Lorraine Bennett](#) for an informal chat about the role.

LGPS England & Wales Scheme Advisory Board (SAB)

Academy conversions guidance

On 19 October 2023, the SAB published [guidance on academy conversions](#).

The guidance is published in response to a recommendation in the [Section 13 Report](#) on the 2019 fund valuations, produced by the Government Actuary's Department (GAD).

The guidance explains the common actuarial approaches LGPS administering authorities use when a local authority school converts to an academy. It was developed in a collaborative way by a working group. The group included representatives from GAD, the Department for Levelling Up, Housing and Communities (DLUHC), the Department for Education, fund practitioners, fund actuaries, academy school representatives and trade unions.

The Board thanks all those who contributed to its production.

DLUHC consultation on investment reforms

On 2 October 2023 the SAB published its [full response to the investment consultation](#).

We covered the consultation in [Bulletins 240 and 243](#). The consultation contained proposals in a range of areas, including:

- setting a target date for the migration of all listed assets to pools
- a proposal to move to fewer pools - with a target size of £50 billion
- a requirement for funds to have a plan to invest up to 5 per cent of assets to support levelling up in the UK

- a proposal for funds and pools to dedicate 10 per cent of assets to private equity investments.

The Board's response was shaped by a working group comprising of councillors, scheme representatives and practitioners from the Board's membership, led by Board Chair, Cllr Roger Phillips.

The SAB's Secretariat thanks all who contributed to its production.

Knowledge and Skills survey

The SAB Compliance and Reporting Committee issued a survey for completion by pension committee and local pension board members. It should take no more than eight minutes to complete and closes on 6 November 2023.

The survey seeks to gather information on the experience of pension committee and local pension board members in obtaining the required knowledge and skills for their role. It builds on a survey issued earlier this year which also captured the views of officers. The data collected will not be shared on an individual or identifiable basis.

LGPS-Live – 1 November

The next LGPS-Live webinar is taking place on 1 November between 3.30pm and 5.00pm. The SAB Secretariat will deliver a SAB update along with a panel discussion on governance issues and best practice in keeping your pension board and committee's knowledge and skills up to date.

LGPS-Live is a webinar series focusing on the key issues for administering authorities and pools. Recent topics include McCloud, audit issues and the gender pensions gap.

To watch recordings of previous episodes and to register for future ones, visit the [LGPS-Live website](#).

Website

[The SAB's website](#) provides information about its work. Use the links below to find out more about:

- [latest news](#)
- [SAB meeting and agenda papers](#)
- [committee meetings and agenda papers](#)
- [Responsible Investment Advisory Group meetings and agenda papers.](#)

Your LGPS contacts – stay connected

The SAB secretariat uses the Your LGPS Contacts database to keep practitioners informed about its ongoing and future workstreams. Unfortunately, it often gets a high number of undeliverable messages. The Secretariat asks that all administering authorities review their political and finance contacts as soon as possible.

Administering authorities are responsible for maintaining their contacts details on [‘Your LGPS Contacts’](#). Authorities should regularly review their details so they remain accurate and up to date.

Action for administering authorities

Review and update the information on [‘Your LGPS contacts’](#).

LGPS England & Wales

LGPS statistics for 2022/23 published

On 25 October 2023, the Department for Levelling up and Communities (DLUHC) published the [LGPS statistics for England and Wales: 2022 to 2023](#).

Highlights include:

- total expenditure was £15.2 billion, an increase of 5.1 per cent on 2021/22
- total income was £17.3 billion, an increase of 8.5 per cent on 2021/22
- employers’ contributions amounted to £8.4 billion, an increase of 7.8 per cent on 2021/22
- employee contributions were £2.8 billion, an increase of 9.5 per cent on 2021/22
- the market value of the LGPS funds at the end of March 2023 was £357.2 billion, a decrease of 1.9 per cent
- there were 6.2 million scheme members on 31 March 2023: 2 million active members, 1.9 million pensioners and 2.3 million deferred members
- there were 87,129 retirements, a decrease of 8 per cent compared with 2021/22.

SCAPE discount rate and actuarial factors – fourth batch

On 2 October 2023, Jayne Wiberg emailed administering authorities confirming that DLUHC has issued the fourth batch of factors. The new factors came into force from 2 October 2023, except the Club transfer factors, which are effective from 1 October 2023.

This completes the review of the factors after the change to the SCAPE discount rate in March 2023.

The transitional arrangements table sets out how administering authorities must implement the new factors. These are:

- Club transfers out: tables 1 to 6 titled 'Club 2023 tables'. If the guarantee date is before 1 October 2023 and the member elects within the guarantee period, use the old factors. Otherwise use the new factors.
- Club transfers in: tables 1 to 6 titled 'Club 2023 tables'. If the guarantee date is before 1 October 2023, use the old factors. Otherwise use the new factors. You should always use the same version of the factors as the sending scheme. If you think they have used the wrong version please query this with them.
- Purchase of additional pension – election made on or after 1 April 2014: tables x-711 to x-720. If the member elected, or the employer decided to award additional pension before 2 October 2023, use the old factors. Otherwise, use the new factors. For members who elect to pay the additional contributions by regular contributions before 2 October 2023 and the contract continues after March 2024, recalculate these using the new factors from 1 April 2024.
- Purchase of additional pension – election made on or after 1 April 2012 and before 1 April 2014: tables x-705 to x-708. If the contract continues after March 2024, recalculate the contributions using the new factors from 1 April 2024.
- Purchase of additional pension – election made on or after 1 April 2008 and before 1 April 2012: tables x-701 to x-704. If the contract continues after March 2024, recalculate the contributions using the new factors from 1 April 2024.
- Conversion of accumulated AVCs to transfer credits: table x-801. Where the member elected before 2 October 2023, use the old factors. Otherwise use the new factors.
- Use of accumulated AVCs to provide additional pension: tables x-802 to x-803, x-806 to x-807. Where the member elected before 2 October 2023, use the old factors. Otherwise use the new factors. We do not expect tables x-802 and x-803 to be used. This is because these only affect members who left active membership before 1 April 2014, and who immediately elected to use their AVCs to purchase additional pension.
- Purchase of additional survivor benefits: tables x-808 to x-811. If the contract continues after March 2024, recalculate the contributions using the new factors from 1 April 2024.

We have updated the APC calculators on the [member website](#) with the new factors.

You can find links to the factor spreadsheets, transitional arrangements table and guidance on the [Actuarial guidance page](#) of www.lgpsregs.org.

Action for administering authorities

Apply the new factors in accordance with the transitional arrangements table.

LGPS Scotland

SAB annual report 2021/22

The Scottish Scheme Advisory Board (SAB) has published its [annual report for 2021/22](#).

The report is for LGPS members, employers, and other stakeholders.

It covers:

- the work of the Board over the last financial year
- a summary of the financial position of LGPS funds in Scotland
- statistics on membership, benefits, contributions and investments.

SCAPE discount rate and actuarial factors – fourth batch

On 3 October 2023, Craig Finlay, Policy Officer at the Scottish Public Pensions Agency (SPPA), emailed administering authorities with the fourth batch of actuarial factors. Craig then sent an updated version of the transitional arrangements table.

The new factors came into force from 3 October 2023, except the Club transfer factors, which are effective from 1 October 2023.

This completes the review of the factors after the change to the SCAPE discount rate in March 2023.

The transitional arrangements table sets out how administering authorities must implement the new factors. These are:

- Club transfers out: tables 1 to 6 titled 'Club 2023 tables'. If the guarantee date is before 1 October 2023 and the member elects within the guarantee date, use the old factors. Otherwise, use the new factors.
- Club transfers in: tables 1 to 6 entitled 'Club 2023 tables'. If the guarantee date is before 1 October 2023, use the old factors. Otherwise, use the new factors. You should always use the same version of the factors as the sending scheme. If you think they have used the wrong version, please query this with them.

- Purchase of additional pension – election made on or after 1 April 2015: tables x-711 to x-720. If the member elected or the employer decided to award additional pension before 3 October 2023, use the old factors. Otherwise, use the new factors. For members who elected to pay the additional contributions by regular payments before 3 October 2023 and the contract continues after March 2024, recalculate these using the new factors from 1 April 2024.
- Purchase of additional pension – election made on or after 1 April 2012 and before 1 April 2015: tables x-705 to x-708. If the contract continues after March 2024, recalculate the contributions using the new factors from 1 April 2024.
- Purchase of additional pension – election made before 1 April 2012: tables x-701 to x-704. If the contract continues after March 2024, recalculate the contributions using the new factors from 1 April 2024.
- Use of accumulated AVCs to provide additional pension: tables x-805 to x-806. If the member elected before 3 October 2023, use the old factors. Otherwise, use the new factors.
- Purchase of additional survivor benefits: tables x-801 to x-804. If the contract continues after March 2024, recalculate the contributions using the new factors from 1 April 2024.

We have updated the APC calculators on the [member website](#) with the new factors.

You can find links to the factor spreadsheets, transitional arrangements table and guidance on the [Actuarial guidance](#) page of www.scotlgpsregs.org.

Action for administering authorities

Apply the new factors in accordance with the transitional arrangements table.

HMRC

Newsletter 153

HMRC published [newsletter 153](#) on 26 October 2023. The newsletter includes updates on the Managing Pension Schemes service. These cover:

- migrating to the service
- using the service to create, compile and view event reports in-year for the tax year 2023/24 onwards
- using the service to submit pension scheme returns for tax years from 2023/24.

Public service pensions remedy newsletter

HMRC has published [the remedy newsletter – October 2023](#).

The newsletter introduces the '[Calculate your public service pension adjustment service](#)'. This is for members who need to correct their tax position because of the McCloud remedy. The service will help members to:

- work out any repayments they are due for a lifetime allowance or annual allowance charge they have previously paid
- work out new, reduced or extra lifetime allowance or annual allowance charges that they may have to pay
- submit information for HMRC to review.

The newsletter also announces the launch of:

- [interactive guidance for members](#) to check if they are affected by the McCloud remedy
- [full guidance on the remedy for members](#)
- [full guidance on the remedy for administrators](#).

The guidance for administrators covers the pension tax rules they need to follow when implementing the McCloud remedy.

McCloud

Compensation cases

The Department for Levelling Up, Housing and Communities (DLUHC) would like to know if administering authorities receive any applications for McCloud compensation.

For example, an authority might receive an application from a member who overpaid an annual allowance charge that HMRC will not refund.

Action for administering authorities

Send depersonalised details of each case to lqpensions@levellingup.gov.uk.

Dedicated areas of member websites

We have created new areas in the member websites dedicated to the McCloud remedy for England & Wales and Scotland. The new pages include:

- a short video

- frequently asked questions
- an interactive ‘Am I affected?’ tool
- examples of how members might be affected
- detailed information about how the remedy will affect different types of members.

Please publicise the new McCloud pages to your members and employers:

- [LGPS \(England and Wales\) McCloud for members](#)
- [LGPS \(Scotland\) McCloud for members](#).

Thanks to Meirion Jones from Gwynedd Pension Fund for helping us produce the Welsh language version of the video.

Initial prioritisation policy

On 12 October 2023, on behalf of DLUHC, we emailed administering authorities in England and Wales. The email included a link to DLUHC’s initial policy on how to prioritise cases affected by the McCloud remedy.

The Scottish Public Pensions Agency (SPPA) agreed to use the same policy for administering authorities in Scotland. On 16 October 2023, on SPPA’s behalf, we emailed authorities to circulate their version of the policy.

The policies are not yet final. They will be discussed with the McCloud statutory guidance working group. DLUHC and SPPA will also consult on the policies before a final version is issued early next year.

You can view each policy on the:

- [Administrator guides and documents page \(England and Wales\)](#)
- [Administrator guides and documents page \(Scotland\)](#).

Interfund transfers and the underpin

Certain transfers for members with underpin protection are on hold until the actuarial guidance for transfers is updated for the McCloud remedy. DLUHC and SPPA confirm:

- administering authorities can continue paying interfund transfers for members with underpin protection using the methodology in the current actuarial guidance
- authorities will not need to review these payments when the guidance is updated.

The sending authority must make sure they provide the receiving authority with the information they need to perform accurate underpin calculations. The sending authority should have:

- loaded any hours changes and service breaks for the remedy period,
- validated that information, and
- if the member is over age 65, supplied the provisional underpin amount, provisional assumed benefits and the underpin date.

It should not be necessary for the receiving authority to take any additional steps to verify the information they receive.

On 24 October 2023, Rachel Abbey emailed administering authorities in England and Wales to tell them about this approach. Kimberley Linge (SPPA) emailed Scottish administering authorities on the same day to say the approach also applies in Scotland.

You can find the actuarial guidance on the:

- [Actuarial guidance page \(England and Wales\)](#)
- [Actuarial guidance page \(Scotland\)](#).

Action for administering authorities

Apply the approach set out by DLUHC and SPPA for interfund transfers.

McCloud survey

On 20 October 2023 Jayne Wiberg, on behalf of the National LGPS Technical Group, emailed administering authorities with a McCloud survey. The survey closes on 23 November 2023.

The survey gathers information about administering authorities progress in implementing the McCloud remedy.

All results are published anonymously and shared with the relevant Scheme Advisory Boards and the Pensions Regulator. You can see results of previous surveys on the:

- [Technical group page \(England and Wales\)](#)
- [Technical group page \(Scotland\)](#).

We strongly urge authorities to complete the survey so the Technical Group has a full picture of the implementation progress across England & Wales, Scotland and Northern Ireland.

If you have not received the survey and believe you should have done so, please contact jayne.wiberg@local.gov.uk.

Action for administering authorities

Complete the survey by 23 November 2023.

Teachers' excess service – TPS communications in England and Wales

The Teachers' Pension Scheme (TPS) has issued its first communications to employers in England and Wales about the McCloud remedy for teachers with excess service. Administering authorities may start to receive queries from employers about this issue.

A teacher has excess service if they have a part time teaching post as well as a full-time role. Unprotected teachers in this group will become retrospectively eligible for membership of the LGPS for the period from 1 April 2015 to 31 March 2022. You can read more about how the McCloud remedy will operate for this group in [Bulletin 229](#).

The [October 2023 TPS employer bulletin](#) directs employers to the [Transitional Protection and members with LGPS linked excess service](#) page of their website. You may also find the [member page for teachers with excess service](#) useful. This includes links to additional pages of information for members who may be affected.

Templates for member correspondence and disclosure article

We are working with the Communications Working Group to produce templates for administering authorities to use to communicate with their members about the McCloud remedy. Authorities can find the initial draft on the LGPS administrator websites in the:

- [Administrator guides and documents page \(England and Wales\)](#)
- [Administrator guides and documents page \(Scotland\)](#).

The first draft includes paragraphs administering authorities can add to existing letters to members protected by the underpin from 1 October 2023:

- 'compulsory' retirement quote letter – where the retirement date is fixed, such as redundancy/efficiency retirement, ill health retirement or age 75

- ‘optional’ retirement quote letter – where the member is under age 75 and may choose to delay payment to a later date
- retirement estimates provided on the member’s request
- deferred benefits calculation.

We have also included an article to inform members about the changes. The article satisfies the requirements set out in the Occupational and Personal Pension Schemes (Disclosure of Information) Regulations 2013. Administering authorities must inform all members who might be affected by the changes as soon as possible and, in any event, by no later than 31 December 2023.

Action for administering authorities

Include the template paragraphs within your communication to members.

Use the disclosure article to inform members about the changes.

Timeline regulations

We have updated the [England and Wales Timeline regulations](#) and the [Scotland Timeline regulations](#) to include the changes that came into force on 1 October 2023.

Pensions dashboards

Blog on common questions

The Pensions Dashboards Programme (PDP) published a [blog addressing some of the common dashboard questions](#).

The blog, written by Chris Curry, Principal of PDP, covers:

- How is connection guidance different to the connection deadline?
- When will guidance be published, and how will PDP engage with industry?
- Are there any examples of how dashboards will look?
- Will smaller schemes, 1 to 99 members, be required to connect to dashboards in the future?

Dashboards survey

On 20 October 2023 Jayne Wiberg, on behalf of the National LGPS Technical Group, emailed administering authorities with a Pensions Dashboards survey. The survey closes on 23 November 2023.

The survey gathers information about administering authorities' progress in implementing the Pensions Dashboards

All results are published anonymously and shared with the relevant Scheme Advisory Boards and the Pensions Regulator. You can see results of previous surveys on the:

- [Technical group page \(England and Wales\)](#)
- [Technical group page \(Scotland\)](#).

We strongly urge administering authorities to complete the survey so the Technical Group has a full picture of the implementation progress across England & Wales, Scotland and Northern Ireland.

If an authority has not received the survey and believes they should have done so, please contact jayne.wiberg@local.gov.uk.

Action for administering authorities

Complete the survey by 23 November 2023.

National LGPS Technical Group – AVCs and dashboards

At its meeting of 29 September 2023, the National LGPS Technical Group agreed to form a sub-group to look at AVCs and dashboards.

The sub-group will work with all LGPS AVC providers to establish common approaches on matching and providing value data.

We will support the sub-group, which comprises representatives from software providers and administering authorities. Progress from the sub-group will be published in the National LGPS Technical Group minutes on the:

- [Technical group page \(England and Wales\)](#)
- [Technical group page \(Scotland\)](#).

If an authority has any questions about the sub-group and its work, please contact jayne.wiberg@local.gov.uk.

PDP connection forum

PDP hosts a virtual connection forum via MS Teams around every eight to ten weeks. This is an informal platform that is not recorded or minuted.

Attendees are provided with updates on PDPs progress and connection. The forum intends to facilitate discussion and questions and answers on relevant topics, such as data readiness, connection, standards, partial matching etc.

To sign up, email eventsdpd@maps.org.uk.

PDP webinar

On 1 November 2023, PDP will host a webinar providing an update on pensions dashboards.

PDP's principal, Chris Curry, will present alongside others from PDP to provide detail on their progress.

[Register for the webinar](#).

TPR blog on dashboard checklist

The Pensions Regulator (TPR) has published [a blog encouraging schemes to follow their dashboard checklist](#).

The blog also warns schemes they need to start preparing for dashboards now, as it will take time and involve a lot of work. Schemes should not lose focus of this while they wait for their target connection dates.

TPO

October 2023 update

The Pensions Ombudsman (TPO) has published its October 2023 update. The [TPO update](#) contains various articles that may be of interest to administering authorities.

Other news and updates

Member website receives accessibility accreditation

The [member website for England and Wales](#) been awarded the Shaw Trust Accessibility Accreditation. This means it has been tested by people with a wide range of disabilities and found to be accessible. All assessments are carried out in line with the Web Content Accessibility Guidelines (WCAG) 2.1 A and AA criteria.

Although, the [Scottish member website](#) was not tested separately, it is also accessible as it is a copy of the England and Wales website.

Club memorandum

On 2 October 2023 Jayne Wiberg emailed administering authorities confirming the Cabinet Office has published a revised Club Memorandum, effective from 1 October 2023.

The revisions are mostly about the McCloud remedy. For members with McCloud protection, the Memorandum explains:

- the information that must be exchanged
- how to calculate the transfer
- how to treat contribution differences.

The Memorandum also covers:

- how to deal with transfers between schemes with different revaluation dates
- confirmation that the 12-month time limit can be extended
- how to handle added CARE pension (this has changed from what we reported in [Bulletin 240](#)). Added CARE pension is only included in Club calculations if it has identical benefits as the rest of the CARE pension in the sending scheme. This means it must have the same contingent survivor pension and in-service revaluation. For transfers from the LGPS, added CARE pension is non-club because it does not count towards survivor pensions. The only exception is added pension in LGPS Scotland to cover lost pension while on unpaid leave. This added pension does count towards survivor pensions and should be included in Club calculations.

You can find the new version of the Memorandum (including a track changes version) on the:

- [Other Government documents page \(England and Wales\)](#)
- [Other Government documents page \(Scotland\)](#).

National LGPS Technical Group minutes published

On 5 October 2023, we published the minutes of the National LGPS Technical Group meeting held on 29 September 2023. Topics discussed included:

- dashboards, in particular AVCs and dashboards
- McCloud remedy
- interfunds
- annual report guidance and key performance indicators.

The next meeting is on 8 December 2023.

You can find the minutes on the:

- [Technical group page \(England and Wales\)](#)
- [Technical group page \(Scotland\)](#).

September 2023 CPI rate announced

On 18 October 2023, the Office for National Statistics announced the [Consumer Prices Index \(CPI\) rate of inflation for September 2023 as 6.7 per cent](#).

Government policy in recent years has been to base increases under the Pensions (Increase) Act 1971 and revaluation of pension accounts under section 9 of the Public Service Pensions Act 2013 on the rate of CPI in September of the previous year. We await confirmation from Government that the revaluation and pensions increase that will apply to LGPS active pension accounts, deferred pensions and pensions in payment in April 2024 will be 6.7 per cent.

Training

2024 LGPS Governance Conference

Booking is open for the LGPS Governance Conference 2024. Places are quickly selling this year, so we recommend you book early to avoid disappointment.

The conference will take place on 18 and 19 January 2024 at the Principal Hotel in York. You can attend the conference in person or join us online.

The conference is aimed at councillors and others who attend pension committees/panels and local pension boards. Past delegates include trade union and employer representatives as well as officers who attend and support committees.

Cost

In person - £525 plus VAT. The price is inclusive of overnight accommodation and all meals.

Online - £400 plus VAT.

You can book and view the programme using the links below.

- [book to attend in person](#)
- [book to attend virtually](#).

Alternatively, you can view the programme and book via the [conference flyer](#). The booking page for all LGA events is www.local.gov.uk/events.

2024 training programme

We are pleased to announce we have set our [2024 training programme](#).

We will be running a busy schedule of online and in-person courses for both practitioners and employers.

The courses with confirmed dates will be open for booking on the [LGA events page](#) from mid-December 2023. We will send an email to administering authorities when booking opens.

Wider landscape

New CEO at Money and Pensions Service (MaPS)

On 16 October 2023, MaPS announced in [a press release](#) the appointment of Oliver Morley as its new Chief Executive Officer (CEO).

Oliver is the CEO of the Pension Protection Fund and will join MaPS on 1 February 2024.

Teachers Pension Scheme grant guidance updated

On 17 October 2023, the Government updated its [guidance on teachers' employer contribution pension grants](#). The guidance covers the grant for the financial year 2023 to 2024.

Legislation

Northern Ireland Statutory Instruments

[The Local Government Pension Scheme \(Amendment No. 2\) Regulations \(Northern Ireland\) 2023](#) [2023/149]

[The Parental Bereavement Leave and Pay \(Consequential Amendments to Subordinate Legislation\) \(No. 2\) Regulations \(Northern Ireland\) 2023](#) [2023/157]

Useful links

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

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

[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 HMRC that they meet the conditions to be a ROPS and have asked to be included on the list.

LGPS pensions section

Raising a query

If you have a technical query, please email query.lgps@local.gov.uk and one of the team's LGPS pension advisers will get back to you. To avoid delays in receiving a response, please do not email advisers directly.

Team contacts

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Further information

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