

LGPC Bulletin 252 - June 2024

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

- McCloud and annual benefits statements (England and Wales)
- transitional arrangements for paying PCELSs (Scotland)
- McCloud protection and non-Club CETV calculations
- McCloud implementation statutory guidance published (England and Wales)
- Concurrent adjustments (England and Wales)
- TPR nudge campaign for pensions dashboards

which need action by certain stakeholders.

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

Index

LGPS England & Wales	3	
McCloud ABS consultation	3	
McCloud implementation statutory guidance	5	
Updated trivial commutation actuarial guidance	5	
Aggregation and concurrency	5	
LGPS Scotland		
PCELS update	6	
Ill health certificates	7	
Pensions dashboards		
PASA Spring 2024 dashboards update	7	
TPR nudge campaign	8	
McCloud	8	

	Non-Club CETVs for members with McCloud protection	8
	New versions of McCloud non-Club transfer calculator published	10
	Public service pensions remedy newsletter	10
L	.GPS England & Wales Scheme Advisory Board (SAB)	10
	SAB statement on Minister's letter to LGPS funds on efficiencies	10
	Publication of the Scheme Annual Report	10
	New LGPS informer document launched	11
	Good Governance	11
	The Pensions Regulator's (TPR) General Code	12
	Code of Transparency data system early market engagement exercise	12
	Opt out survey now closed	13
	SAB view of ESFA as Guarantor of Academy Schools	13
	Gender pensions gap research – call for volunteers	13
	SAB website	
TPO		14
	Volunteers' week	14
	Dominic Harris Blog on the TPO operating model	14
C	Other news and updates	14
	Abolition of the LTA guide – version 2.3	14
	Guidance on data presence and accuracy	15
	HM Treasury revaluation issue 2021 and 2022	15
	National LGPS Technical group	15
T	raining	16
	Fundamentals training 2024	16
	Annual conference – save the date	17
	Training programme 2024	17
Wider landscape		
	Finance (No. 2) Act 2024	18
L	egislation	18
	Acts	18

Useful links	18
LGPS pensions section	19
Raising a query	19
Team contacts	19
Further information	20
Copyright	20
Disclaimer	21

LGPS England & Wales

McCloud ABS consultation

The Department for Levelling Up, Housing and Communities (DLUHC) launched a limited technical consultation on potential changes to the LGPS regulations concerning McCloud protection and annual benefit statements (ABS). DLUHC emailed the details to relevant stakeholders on 4 June 2024. The consultation closes on 9 July 2024. DLUHC is consulting on whether underpin information is included in ABSs for Scheme years 2023/24 and 2024/25.

The consultation does not indicate the approach that any future government will take. Decisions will be taken by new Ministers after the general election.

ABSs for active, deferred and deferred pensioner members

Current legislation requires administering authorities to include estimated underpin information for qualifying active members in ABSs for 2023/24 onwards. Underpin information is the estimated final guarantee amount and estimated survivor guarantee amount. For deferred and deferred pensioner members, the rules are less specific.

Before preparing 2023/24 ABSs, for all CARE accounts the authority would need to:

- identify whether the account qualifies for underpin protection
- obtain, validate and load all relevant McCloud service data
- revisit past transfers in and aggregations that qualify for underpin protection to ensure they are correctly and fully recorded for McCloud
- calculate the provisional assumed benefits and provisional underpin amount for deferred members, deferred pensioner members and active members who are over their final salary scheme normal retirement age.

Also, the authority's software would have to be able to calculate and include the estimated underpin information in the statements.

The consultation contains draft regulations that would mean administering authorities do not need to include estimated underpin information in the 2023/24 ABSs. This would implement the approach set out in paragraph 118 of DLUHC's response to the 2020 McCloud consultation. Administering authorities would have the discretion to provide this information for certain members or classes of members if they are able to. The amendment would be backdated to 1 October 2023, so that it captures 2023/24 ABSs that were sent before the regulations are made.

DLUHC is also seeking views on a further change which would extend this to the 2024/25 ABSs. If Ministers decide to take this approach, authorities will have discretion not to include the estimated underpin information for certain members or classes of members if they consider it reasonable to do so. Where such a determination has been made for a member, underpin information would not need to be included in ABSs until the 2025/26 statements are issued.

Authorities using this discretion would need to make the determination before 31 July 2025 and tell all affected members in the ABS for 2024/25. To avoid the risk that this discretion could be used too broadly and delay the McCloud remedy, DLUHC are consulting on whether to issue guidance on the circumstances in which it may be appropriate to use the discretion for 2024/25 and, if so, what those circumstances are.

Pension credit members ABSs

Authorities are required to revisit pension credit calculations where the pension debit member qualified for underpin protection and the pension sharing order effective date was between 1 April 2014 and 30 September 2023. The authority needs to recalculate the cash equivalent, taking into account underpin protection, and, if it is higher than the original, recalculate the credit. We will provide more information on this in the next instalment of the McCloud technical guide. Before we can issue that, we are waiting for the amended GAD guidance on divorce and the GAD note on revisiting past cases.

Technically, ABSs for pension credit members for 2023/24 onwards should reflect the recalculated amount.

As administering authorities are unable to recalculate these pension credits, the same proposed discretions applying to active, deferred and deferred pensioner members for ABSs 2023/24 and 2024/25 would also apply to pension credit members for those years.

McCloud implementation statutory guidance

DLUHC has issued final statutory guidance on McCloud implementation. The guidance is intended to support administering authorities implement the McCloud remedy by providing:

- the Government's view on the approach that should be taken in certain types of cases to achieve consistent application of the remedy across the LGPS
- additional guidance on how certain technical issues that may arise should be approached.

DLUHC conducted a closed consultation on the guidance between 1 March and 12 April 2024.

We have published the guidance on www.lgpsregs.org on the following pages:

- Administrator guides and documents page use the 'subject' filter to find all McCloud documents
- <u>LGPS Regulations 2013</u> in the 'statutory guidance' section.

Updated trivial commutation actuarial guidance

DLUHC issued new actuarial guidance on trivial commutation which is in force from 17 June 2024. The guidance does not contain any new factors, but does provide additional information about how the McCloud remedy affects trivial commutation calculations.

You can find the guidance on the Actuarial guidance page of www.lgpsregs.org.

Aggregation and concurrency

At the National Technical group meeting on 7 June 2024, the group discussed LGPS regulation changes. You can read the <u>Technical group's recommended</u> regulation changes that they agreed to pursue.

The group decided not to pursue an earlier recommendation concerning concurrent aggregations. Regulation 10(8) of the LGPS (Transitional Provisions, Savings and Amendment) Regulations 2014 requires an adjustment to the pre 1 April 2014 service in the terminated job when concurrent membership ends only if both the terminated and ongoing pension accounts include membership built up before 1 April 2014. Technical group had previously recommended a change to require an adjustment to the pre 1 April 2014 service in cases where the ongoing pension account included only post-31 March 2014 membership.

As there will be no changes to this provision, administering authorities should follow the regulations as they stand.

The Scottish Public Pensions Agency is considering the issue for LGPS Scotland.

Members with underpin protection

If a member is protected by the underpin, the provisional underpin amount is based on the pension the member would have built up if 'the member had accrued membership under the 2008 Scheme rather than the 2014 Scheme'. When a concurrent employment ends, it will be necessary to calculate a concurrent adjustment for any 'notional' final salary service built up in the remedy period. This is the case irrespective of the date the membership in the terminated or ongoing post started.

Action for administering authorities

Review your concurrent aggregation processes to ensure that they are in line with the regulations.

LGPS Scotland

PCELS update

Craig Finlay, Policy Officer at the Scottish Public Pensions Agency (SPPA), sent an email to administering authorities on 6 June 2024 about the payment of pension commencement excess lump sums (PCELS) from the LGPS.

The email confirmed that SPPA is currently considering the long-term policy on whether to allow PCELSs to be paid from the LGPS, and if so, what the limits should be.

The email also set out SPPA's view on what administering authorities should do in the meantime:

[...] paragraph 132 of Schedule 9 to the Finance Act 2024 contains transitional provisions that allow administrators to pay PCELSs in the period before scheme rules are updated. Under this clause, where a scheme had a rule relating to a member's entitlement to a lifetime allowance excess lump sum (LTAELS), that rule continues to have effect, as if it was a rule relating to the entitlement to a PCELS.

Prior to the LTA's abolition, the LGPS in Scotland allowed members to take some or all of their benefits exceeding the lifetime allowance as a LTAELS,

subject to contracting out limits (as set out in actuarial guidance). Therefore, until the new LGPS rules on access to PCELSs are in place, where a member has used up all of their LSA (or their lump sum and death benefit allowance), administering authorities must offer members the ability to take all or some of the benefits that would have been in excess of the LTA as a PCELS (to be taxed at their marginal rate). This will be subject to any overall conditions that apply to PCELSs, including that a member must become entitled to a relevant pension at the same time a PCELS is paid (so if the member has no LSA remaining, they can't commute all of their pension to take a PCELS – at least £1 of annual pension has to be paid).

We have updated the 'Abolition of the LTA' technical guide to include examples. You can find the latest version of the guide (version 2.3) on the <u>Administrator guides</u> and <u>documents</u> page of <u>www.scotlgpsregs.org</u>.

Action for administering authorities

Review and apply the transitional arrangements set out in SPPA's email.

III health certificates

On 17 June 2024, Steven Moseley emailed administering authorities letting them know that we have published version 1.1 of the ill health certificates.

The new version reflects the revised <u>ill health statutory guidance</u> published by SPPA in March 2024.

The new version of the certificates (including a tracked changes version) is available on the <u>Administrator guides and documents</u> page of <u>www.scotlgpsregs.org</u>.

Action for administering authorities

Review the changes and update your certificates.

Pensions dashboards

PASA Spring 2024 dashboards update

On 13 May 2024, the Pensions Administration Standards Association (PASA) published their <u>Spring update on dashboards</u>. The update looks at AVCs, a matrix of synthetic test cases, matching and administration readiness.

TPR nudge campaign

TPR is about to recommence their programme of nudge communications to schemes.

Your 'key dashboards contact', can expect to receive a series of five emails in the run up to the 'connect by' date of 31 October 2025. For public service pension schemes the emails will commence in July 2024. Please use the link within the nudge emails to nominate further contacts.

The nudge emails will contain key messages about where TPR expects administering authorities to be in the dashboards implementation process.

In November 2024, authorities can expect to receive their first dashboards readiness survey from TPR. The survey covers nine key areas including:

- awareness of duties
- preparation for connection
- data preparation
- · compliance and
- engagement.

All responses will be kept anonymous. We strongly recommend you complete the surveys to enable TPR to create a picture of the dashboards implementation progress across the public sector.

Action for administering authorities

Make sure you have registered your 'key dashboards contact' and use the link within your first nudge email to nominate further contacts.

McCloud

Non-Club CETVs for members with McCloud protection

We have received a number of queries concerning the calculation of a non-Club cash equivalent transfer value (CETV) for a member protected by the McCloud remedy. It is clear that not all administering authorities are following the instructions in the GAD guidance on individual incoming and outgoing transfers. You can find the relevant information in:

 Sections 4.5 to 4.15 of the <u>GAD transfers guidance for England and Wales</u> dated 24 January 2024 Sections 4.5 to 4.15 of the <u>GAD transfers guidance for Scotland</u> dated 29 February 2024.

We expect DLUHC / SPPA to publish revised versions of the guidance shortly that will include updated examples. Please make sure you are referring to the latest version of the guidance by visiting the:

- Actuarial guidance (England and Wales) page of www.lgpsregs.org
- Actuarial guidance (Scotland) page of www.scotlgpsregs.org.

Any adjustment to the non-Club CETV for a member with McCloud protection is based on the cash equivalent value of the revalued provisional underpin amount and provisional assumed benefits. If the cash equivalent value of the provisional underpin amount is higher, the difference is added to the CETV payable. In some cases, there will also be an addition relating to the survivor pension.

It is not always possible to tell whether there should be an addition to the non-Club CETV based on the provisional figures calculated on the underpin date. For members with an NPA greater than 65, a higher factor is used to work out the cash equivalent value of the provisional underpin amount than is used for the provisional assumed benefits. Only by calculating the cash equivalent values can authorities be certain whether the CETV should increase.

There are no longer any interim arrangements for interfund payments. If you are making an interfund payment to a different administering authority in respect of a member with McCloud protection, that payment should include any addition to the CETV that results from their underpin protection.

We have produced a spreadsheet to calculate the McCloud element of a non-Club CETV. You can find the spreadsheet and all McCloud documents we have produced by using the 'Subject' filter on the:

- Administrator guides and documents (England and Wales) page of www.lgpsregs.org
- Administrator guides and documents (Scotland) page of www.scotlgpsregs.org.

Action for administering authorities

Review your transfer, divorce and interfund processes to make sure your non-Club CETV calculations are correct for members with McCloud protection.

Make sure you are using the latest version of the McCloud CETV calculator – see the next article

New versions of McCloud non-Club transfer calculator published

On 26 June 2024, we published new versions of the 2024/25 spreadsheets for calculating the McCloud element of a non-Club CETV. We have corrected an error in the previous version that stopped calculations for members with an underpin date in the current year being processed.

You can find version 1.1 of the McCloud non-Club calculator on the:

- Administrator guides and documents (England and Wales) page of www.lgpsregs.org
- Administrator guides and documents (Scotland) page of www.scotlgpsregs.org.

Public service pensions remedy newsletter

HMRC published the latest <u>public service pensions remedy newsletter</u> on 14 June 2024. The newsletter covers:

- the interim process for members while the 'Calculate your public service pension adjustment service' is unavailable
- planned improvements to the 'Calculate your public service pension adjustment service' and proposed release dates. HMRC plans to re-open the service with some improvements in place in mid-July 2024, with further updates in September 2024
- a request for volunteers to email <u>publicservicepensionsremedy@hmrc.gov.uk</u> if they would like to influence the future development of the service.

LGPS England & Wales Scheme Advisory Board (SAB)

SAB statement on Minister's letter to LGPS funds on efficiencies

Administering authorities in England have been encouraged to reply to the Minister's letter dated 15 May 2024 by responding directly to officials in the DLUHC pensions team. This will help them brief new ministers after the general election on 4 July 2024. The Board has issued a <u>statement and drafted suggested text for authorities to include in their response</u>.

Publication of the Scheme Annual Report

The SAB has published its <u>eleventh Scheme Annual Report</u>. The aim of the Scheme Annual Report is to provide a single source of information about the status

of the LGPS for its members, employers, and other stakeholders. This report combines information supplied in the England and Wales LGPS fund annual reports, as of 31 March 2023 for the reporting year 2022/23.

New LGPS informer document launched

The SAB and the Institute of Chartered Accountants in England and Wales (ICAEW) have published <u>an informer document</u> to explain the timeline and information flow for the triennial valuation and accounting/audit purposes.

The document is intended to be a practical document that explains:

- how the LGPS works in practice
- key information flows between employing bodies, pension funds and actuaries
- the content and purpose of annual accounting reports and triennial valuations
- key accounting requirements for employing bodies
- the role of external auditors.

The primary audience for this informer is Scheme employers and their external auditors. Pension fund officers and actuaries will also find the document useful. ICAEW and the SAB have also created a video on the Informer, in which Jack Bower (ICAEW) and Becky Clough (LGPS SAB) discuss why it was developed and how to use it.

The SAB secretariat wishes to thank all the participants listed on page three of the document, in particular Peter Worth of Worth Technical Accounting Solutions Ltd, members of the Compliance and Reporting Committee Audit Working Group and those who attended the audit roundtable for all their input into the document.

Any feedback should be sent to: sabsecretariat@local.gov.uk

Action for administering authorities

Please share the new audit informer document with Scheme employers and ask them to share it with their auditors.

Good Governance

We reported in <u>Bulletin 251</u> that the SAB's working group and DLUHC had made significant progress on the draft regulations and consultation document to implement the Good Governance recommendations. The General Election on 4 July 2024 means it is very unlikely that we will have clarity for some months (possibly towards the end of this calendar year). The SAB will ensure that the implementation of the Good Governance recommendations is raised as a priority with the Minister when the new Government is formed.

The Pensions Regulator's (TPR) General Code

We reported in <u>Bulletin 251</u> that DLUHC's implementation of the Good Governance recommendations should help resolve some of the ambiguity in the General Code ('the Code') for the LGPS but that administering authorities should not delay reviewing their own compliance, while awaiting the consultation. For example, there is overlap in the Good Governance recommendations with the requirements in the following TPR Code modules:

- the governing body
- funding and investment
- administration
- · communications and disclosure
- reporting to TPR.

Further delays to the Good Governance consultation reinforce the view that authorities should be planning and reviewing their own compliance with the Code.

The Board is aware that many authorities have started to plan and report to their governance bodies on how they intend to review their own compliance against the Code and some have completed their compliance review. All authorities will have different starting positions and will need differing action plans and timescales to be able to demonstrate full compliance. There is no regulatory timescale to comply within the Code, but having a clear action plan setting out how and when the administering authority is planning to address Code compliance has been strongly encouraged by TPR. The Board suggests that Code compliance should be an agenda item for upcoming pension committee and local pension board meetings if it has not already been considered.

Code of Transparency data system early market engagement exercise

To support compliance with the LGPS Code of Transparency, the SAB is now researching the longer-term future of the data compliance system that supports it. As part of this work, the Secretariat is launching an early market engagement exercise to explore the possible future iterations of the data system and estimated costs.

The <u>code of transparency compliance system</u> allows:

- the SAB to have oversight of compliance with the Code of Transparency
- funds to run a suite of reports
- funds to compare their costs with funds of a similar size.

The early market engagement exercise will be launching soon. Once it is live, the details of the areas we are exploring will be available on our website. Please send any queries to sabsecretariat@local.gov.uk.

Opt out survey now closed

In <u>Bulletin 251</u>, we reported that the SAB had issued a short survey to local government employers in England on opt outs in the LGPS. The survey was sent to the main HR/personnel contacts within the LGA's member councils and closed on 7 June 2024.

The SAB has analysed the 53 responses to the survey. A <u>paper outlining the main findings and suggesting next steps for action</u> has been submitted to the Cost Management, Benefit Design and Administration Committee for its meeting on 1 July 2024. It is hoped the data collected can improve understanding of the membership of the LGPS and why some people choose to opt out. The SAB Secretariat would like to thank all employers who took the time to respond to the survey.

SAB view of ESFA as Guarantor of Academy Schools

The Education and Skills Funding Agency (ESFA) is the <u>ultimate guarantor of academy schools</u>. In the light of this, the SAB has been asked to confirm its view that the ESFA is a body whose rights and/or liabilities under the Scheme may be the subject of decisions made by the administering authority. This is most likely to arise in connection with decisions relating to the exit of an academy school, eg whether exit payments or credits are due under regulation 64 of the LGPS Regulations 2013. As the ESFA is a body whose rights and/or liabilities under the Scheme may be the subject of decisions made by the administering authority, ESFA should be kept informed and is entitled to make representations as to its interests.

Gender pensions gap research – call for volunteers

Thank you to the fund officers for sharing the SAB's request for volunteers with employers. The SAB secretariat has had two meetings with volunteers. The meetings are to discuss the proposals and barriers for further research. Those who are still interested can contact the SAB by emailing sabsecretariat@local.gov.uk.

SAB website

The SAB's website provides information about its work and the meeting agendas and reports for the SAB and its Committees. Use the links below to find out more about:

- a summary of the last SAB meeting
- latest news
- SAB meeting and agenda papers
- Committee meetings and agenda papers
- Responsible Investment Advisory Group meetings and agenda papers.

TPO

Volunteers' week

The week beginning 3 June 2024 was national volunteers' week. To celebrate, the Pensions Ombudsman (TPO) published testimonials from some of its current volunteers.

You can read the testimonials on the News page of TPO's website.

Dominic Harris Blog on the TPO operating model

In this <u>blog from the pensions ombudsman</u>, Dominic Harris talks about:

- how the TPO operating model review will benefit the industry and members
- changes that mean a member must exhaust a scheme's formal complaints process before bringing a case to TPO.

Other news and updates

Abolition of the LTA guide – version 2.3

On 25 June 2024, we published version 2.3 of the Abolition of the lifetime allowance (LTA) guide.

We have updated the guide to:

- confirm that HMRC has published a tool members can use to check if they can apply for a transitional tax-free amount certificate (TTFAC)
- clarify what happens when a TTFAC is cancelled or is inaccurate
- provide information about paying supplementary pensions increase this is a new relevant benefit crystalisation event (RBCE)
- confirm the Scottish Public Pensions Agency (SPPA) transitional provisions for paying a pension commencement excess lump sums (PCELS) from LGPS Scotland.

You can find the latest version of the guide on the:

- Administrator guides and documents (England and Wales) page of www.lgpsregs.org
- Administrator guides and documents (Scotland) page of www.scotlgpsregs.org.

We have received several queries about how to calculate a PCELS for a member with contracted out rights. There is no statutory guidance setting out how this should be done. If you would like help with any live cases, please email query.lgps@local.gov.uk and we will do our best to help.

Guidance on data presence and accuracy

In June 2024, the Pensions Administration and Standards Association (PASA) published new guidance titled 'Data Presence v Accuracy'.

The guidance sets out why data should not just be present but accurate. It provides suggestions on how administrators can improve and maintain their data accuracy.

This guidance may prove particularly helpful when preparing data for submission to the pensions dashboards ecosystem.

HM Treasury revaluation issue 2021 and 2022

<u>Bulletin 249</u> covered the HM Treasury revaluation issue for years 2021 and 2022 in the Firefighters' Pension Scheme and the Armed Forces Pension Scheme.

Regulation changes are necessary to correct the issue. So far, the following have been amended:

- Firefighters' CARE Scheme (England) (amendments took effect from 27 March 2024)
- Firefighters' CARE Scheme (Scotland) (amendments took effect from 2 February 2024)
- Firefighters' CARE Scheme (Northern Ireland) (amendments take effect from 5 July 2024)
- Armed Forces CARE scheme (UK) (amendments took effect from 6 May 2024).

We will provide a further update when the regulations for the Firefighters' Pension Scheme in Wales are updated.

National LGPS Technical group

On 13 June 2024, the minutes of the National LGPS Technical group meeting held on 7 June 2024 were published.

Topics discussed included pensions dashboards, McCloud, AVCs, regulatory amendments and amendments to the terms of reference.

The minutes can be found on the:

- Technical Group page (England and Wales) of www.lgpsregs.org, and
- <u>Technical group page (Scotland) of www.scotlgpsregs.org.</u>

Training

Fundamentals training 2024

We are pleased to announce that our 2024 Fundamentals training is now open for booking.

Fundamentals is a three day training course aimed at councillors and others who attend pension committees and local pension boards. The course provides a scheme overview and covers current issues in relation to administration, investment and governance in the LGPS. Attending all three days will help delegates meet the relevant requirement for knowledge, skills and understanding required in statute or encouraged by relevant guidance. All sessions are delivered by experts in their field.

See the <u>Fundamentals 2024 draft course programme</u> for full details. The timings shown apply to the in-person sessions.

We are running the training online using Zoom and in person in London and York. We will deliver each day of the online sessions over two half days. You only need to complete one booking for each day, this will automatically book you on both the half days. It is not possible to book for a half day.

Cost

In person: £290 plus VAT per day (includes lunch and refreshments)

Online: £250 plus VAT per day.

Booking your place

We recommend early booking as places are limited. You can book online through the <u>Local Government Association (LGA) events website</u>. Only member councils of the LGA can pay by invoice. All other organisations must pay by credit/debit card.

Each event listed below has a link to the booking page for that day.

Fundamentals day 1: York 10 October 2024

Fundamentals day 1: London (LGA offices) 16 October 2024

Fundamentals day 1: Online 23 and 30 October 2024

Fundamentals day 2: York 5 November 2024

Fundamentals day 2: London (LGA offices) 13 November 2024

Fundamentals day 2: Online 21 and 28 November 2024

Fundamentals day 3: York 4 December 2024

Fundamentals day 3: London (LGA offices) 10 December 2024

Fundamentals day 3: Online 12 and 17 December 2024

Annual conference – save the date

Our annual conference is taking place on 30 and 31 January 2025 at the Highcliff Marriott Hotel in Bournemouth. It retains its popular lunchtime to lunchtime schedule. We are currently finalising the programme and securing speakers.

Booking will open later in the year. If you would like to be notified when booking opens, please <u>register your interest online</u>.

Training programme 2024

All 2024 training events are available to book via the <u>LGA events website</u>. The link for each course contains the course programme, pricing and booking link.

Bookings are on a first come, first served basis. Each topic is capped at five delegates per organisation over the course of the training programme.

If you are unable to book a place on a course, or would like more than five places, email training.lgps@local.gov.uk with details of the course you would like to attend. Please include how many places you require and the format - online or in person. We will keep a waiting list and consider running additional training if the demand is high enough.

We also accept requests for commissioned training. If you would like us to run training for your authority, or a group of authorities, please email training.lgps@local.gov.uk.

Aggregation training (England and Wales)

• 1 August 2024 - online

Employer role training (England and Wales)

- 13 August 2024 London
- 29 August 2024 online

- 1 October 2024 online
- 7 November 2024 online
- 6 December 2024 online

Survivor benefits training (England and Wales)

All courses are currently at capacity.

Transfer training (England and Wales)

All courses are currently at capacity.

Insight training (England and Wales)

All courses are currently at capacity.

Action for administering authorities

Share information about the employer role training with your Scheme employers.

Discuss potential for commissioned training at Pension Officer Group meetings.

Wider landscape

Finance (No. 2) Act 2024

The Finance (No. 2) Act 2024 received Royal Assent on 24 May 2024.

The Act amends the rules concerning collective money purchase (CMP) schemes. The amendment ensures that HMRC's regulation-making powers cater for the range of situations which may arise when a CMP scheme discharges its liabilities on winding up.

Legislation

Acts

Finance (No. 2) Act 2024 [c.12]

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)

Current LGPS job vacancies

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

Joanne Donnelly (Head of Pensions)

Telephone: 07464 532613

Email: joanne.donnelly@local.gov.uk

Lorraine Bennett (Senior Pensions Adviser – LGPC Secretariat)

Telephone: 07766 252847

Email: lorraine.bennett@local.gov.uk

Jayne Wiberg (Pensions Adviser - LGPC Secretariat)

Telephone: 07979 715825

Email: jayne.wiberg@local.gov.uk

Rachel Abbey (Pensions Adviser – LGPC Secretariat)

Telephone: 07827 307003

Email: rachel.abbey@local.gov.uk

Steven Moseley (Pensions Adviser – LGPC Secretariat)

Telephone: 07780 227059

Email: steven.moseley@local.gov.uk

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

Telephone: 07464 652886

Email: karl.white@local.gov.uk

Lisa Clarkson (Pensions Adviser (Employer) – LGPC Secretariat)

Telephone: 07464 532596

Email: lisa.clarkson@local.gov.uk

Toni Durrant (LGPS Training and Development Adviser) – LGPC Secretariat)

Telephone: 07385224553

Email: toni.durrant@local.gov.uk

Daniella Howell (Programme Support Officer (Pensions) – LGPC Secretariat)

Telephone: 07966 441903

Email: daniella.howell@local.gov.uk

Jeremy Hughes (Senior Pensions Secretary - LGPS Scheme Advisory Board (E&W))

Telephone: 07960 513946

Email: jeremy.hughes@local.gov.uk

Ona Ehimuan (Pensions Secretary (Governance and Digital) – LGPS Scheme Advisory Board (E&W))

Telephone: 07501 088144

Email: ona.ehimuan@local.gov.uk

Becky Clough (Board Support and Policy Officer – LGPS Scheme Advisory Board England & Wales)

Telephone: 07795 410793

Email: becky.clough@local.gov.uk

Sarah Tingey (Research and Data Analyst – LGPS Scheme Advisory Board England & Wales)

Telephone: 07548 952802

Email: sarah.tingey@local.gov.uk

Further information

Copyright

Copyright remains with Local Government Association (LGA). This bulletin may be reproduced without the prior permission of LGA provided it is not used for commercial gain, the source is acknowledged and, if regulations are reproduced, the Crown Copyright Policy Guidance issued by HMSO is adhered to.

Disclaimer

The information contained in this bulletin has been prepared by the LGPC Secretariat, a part of the Local Government Association (LGA). It represents the views of the Secretariat and should not be treated as a complete and authoritative statement of the law. Readers may wish, or will need, to take their own legal advice on the interpretation of any piece of legislation. No responsibility whatsoever will be assumed by the LGA for any direct or consequential loss, financial or otherwise, damage or inconvenience, or any other obligation or liability incurred by readers relying on information contained in this bulletin.

Whilst every attempt is made to ensure the accuracy of the bulletin, it would be helpful if readers could bring to the attention of the Secretariat any perceived errors or omissions by emailing query.lgps@local.gov.uk.