

## LGPC Bulletin 256 – October 2024

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

- [McCloud administration guide - version 2](#)
- [Training service](#)
- [Feedback on LGPS informer document](#) (England & Wales)
- [November meeting of pension committee chairs](#) (England & Wales)

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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## LGA - LGPS job opportunities

### Lead Pensions Adviser

We are recruiting for a Lead Pensions Adviser. This is a newly created role and can be home, or office (London) based. The successful candidate will provide technical guidance and support to LGPS administering authorities and employers, as well as specialist advice to Government departments on the development and implementation of pension policy changes.

For more information and to apply see [the Jobtrain website](#). Contact [Lorraine Bennett](#) for an informal chat about the role.

The closing date for applications is 5pm, 24 November 2024. Interviews will be held virtually the week of 2 December 2024.

### Training and Development Adviser

We are also recruiting for an LGPS Training and Development Adviser. This role can be home based or office (London) based. The successful candidate will join the training section of the LGPS team. They will be responsible for developing and delivering training to pension administrators, employers, councillor and local pension board members. They will also assist in the delivery of an LGPS specific qualification.

For more information and to apply see [the Jobtrain website](#). Contact [Lisa Clarkson](#) for an informal chat about the role.

The closing date for applications is 5pm, 24 November 2024. Interviews will be held virtually the week of 2 December 2024.

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## LGPS England and Wales

### LGPS statistics for 2023/24 published

On 24 October 2024, the Ministry for Housing, Communities and Local Government (MHCLG) published the [LGPS statistics for England and Wales: 2023 to 2024](#).

Highlights include:

- total expenditure of £17.1 billion, an increase of 11.9 per cent on 2022/23
- total income of £20.7 billion, an increase of 19.3 per cent on 2022/23

- employer contributions of £10.5 billion, an increase of 24.6 per cent on 2022/23 - this reflects early payment of employer contributions following the triennial valuation
  - employee contributions of £3.0 billion, an increase of 8.3 per cent on 2022/23
  - the market value of LGPS funds on 31 March 2024 was £391.5 billion, an increase of 9.0 per cent since 31 March 2023
  - 99,505 retirements in 2023/24, an increase of 6.3 per cent on the number of retirements in 2022/23.
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## LGPS Scotland

### **Draft LGPS (Remediable Service) (Amendment) (Scotland) Regulations 2024 – LGA / LGPC response**

On 18 October 2024, we responded to the Scottish Public Pensions Agency's (SPPA) consultation on the draft Local Government Pension Scheme (Remediable Service) (Amendment) (Scotland) Regulations 2024. The consultation ran from 2 September 2024 to 28 October 2024.

The draft regulations aim to implement the proposals about annual benefit statements and McCloud, set out in [SPPA Circular 2024/05](#). The regulations also propose further minor technical amendments.

The consultation documents, including our response, are available on the [Scheme consultations](#) page of [www.scotlgpsregs.org](http://www.scotlgpsregs.org).

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## Other news and updates

### **Communications Working Group minutes published**

We have published the minutes from the Communications Working Group meeting held on 3 October 2024. At the meeting the group discussed:

- the member websites – recent changes and suggestions for future updates
- member engagement – resources for new scheme entrants, LGPS promotion project, pension awareness week
- the McCloud remedy – latest news, letter templates, member webinars, plans for the annual benefit statement subgroup
- the latest on pensions dashboards and abolition of the lifetime allowance.

You can find the minutes for past meetings and the group's workplan on the:

- [Communications working group \(England and Wales\)](#) page of [www.lgpsregs.org](http://www.lgpsregs.org) and
- [Communications working group \(Scotland\)](#) page of [www.scotlgpsregs.org](http://www.scotlgpsregs.org).

## **National LGPS Technical Group minutes**

On 14 October 2024 we published the minutes of the National LGPS Technical Group meeting held on 4 October 2024.

The group discussed:

- Pensions dashboards
- McCloud
- increasing the grant of probate limit
- replacement of the group by the new National Pension Officer Group – see next article.

You can find the minutes for past meetings on the Technical group pages of [www.lgpsregs.org](http://www.lgpsregs.org) and [www.scotlgpsregs.org](http://www.scotlgpsregs.org).

## **National Pension Officer Group**

On 4 October 2024, standing members of the National LGPS Technical Group agreed to replace the group with a new group called the National Pension Officer Group (NPOG). NPOG will focus on providing a strategic approach to scheme administration issues along with practical advice.

NPOG will be made up of two representatives from each regional pension officer group and will include attendance from the LGA. Attendance at the group by other representatives, such as software suppliers, MHCLG, SPPA and actuarial firms, will be by invite only for specific agenda items. All meetings will be in person and held at the LGA offices in Westminster.

The Chair, Vice Chair and group Secretary will be elected at the first meeting of NPOG on 6 December 2024.

## **September 2024 CPI rate announced**

On 16 October 2024, the Office for National Statistics announced the [Consumer Prices Index \(CPI\) rate of inflation for September 2024 as 1.7 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 2025 will be 1.7 per cent.

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## McCloud

### Club transfers – extension of 12-month time limit

On 24 October 2024, the Cabinet Office emailed public sector pension scheme stakeholders about the 12 month time limit for Club transfers.

Paragraph 4.1 of the [Club memorandum](#) provides that individuals must elect to proceed with a Club transfer within 12 months of becoming eligible to join their current scheme. However, a transfer can take place after the 12 month time limit if there are exceptional circumstances that have prevented the member from making an election within 12 months, and both the sending and receiving schemes agree.

The email from Cabinet Office states:

“It has long been our policy that, if both schemes agree, that time limit can be extended if there are exceptional circumstances to justify it.

The purpose of this email is to advise that, in its capacity as secretariat to the Club, the Cabinet Office's view is that complying with the 2015 Remedy can be considered as 'exceptional circumstances' for the purposes of extending the 12 month time limit.”

If administering authorities need to extend the 12 month time limit due to the above exceptional circumstance, they will still need to agree any extension with the receiving scheme.

### McCloud administration guide – version 2

On 11 October 2024, we published the second instalment of the McCloud administration guide (version 2). This can be found in the Administrator guides and document pages of [www.lgpsregs.org](http://www.lgpsregs.org) and [www.scotlgpsregs.org](http://www.scotlgpsregs.org).

The second instalment covers other calculations that are impacted by the underpin, such as transfers in, and revisiting past calculations. We have also significantly amended the section on which accounts qualify for protection, taking into account the clarification from Government set out in section 5 of the [McCloud Implementation Statutory guidance](#). We have also made minor amendments to the rest of the guide.

We published the guide in two instalments due to the breadth and complexity of the McCloud remedy project.

The first instalment published in November 2023 included an overview, which pension accounts qualify for underpin protection and how you perform provisional and final underpin calculations.

### **Action for administering authorities**

Review version 2 of the McCloud administration guide and implement appropriate changes to your calculations and processes.

### **McCloud webinars**

During October 2024 we delivered four McCloud webinars for administrators. Two covered transfers and two covered McCloud more generally. Each webinar lasted up to 90 minutes and provided an opportunity for attendees to ask the LGA pensions team questions.

Feedback was very positive. We will consider running more McCloud webinars next year if there is enough demand.

### **New version of GAD interest calculators (England and Wales)**

GAD has issued new versions of the calculators for administering authorities in England and Wales to use in retrospective McCloud calculations.

The changes have been made in response to a request from an administering authority that relates to the number of days used to convert an annual interest rate into a daily rate. The original calculator used 365.25 days. This remains the default, but users can switch to 365 days by using a dropdown menu on the 'Assumptions' tab.

GAD has updated the 'macros' and 'no macros' versions of the spreadsheet and the user guide. You can find version 2.0 of all three in the McCloud section of the [Actuarial guidance](#) page on [www.lgpsregs.org](http://www.lgpsregs.org).

### **Survey on re-visiting Club transfers for McCloud - England and Wales**

On 21 October 2024, Rachel Abbey contacted all administering authorities in England and Wales to ask them to complete a McCloud survey.

GAD is gathering data about how public service pension schemes are planning to approach revisiting past transfers between Club schemes. It is important that as many LGPS administering authorities as possible complete the survey so that GAD



will take their views and plans into account when they produce any cross-scheme guides or other resources.

Please contact [rachel.abbey@local.gov.uk](mailto:rachel.abbey@local.gov.uk) if you require the link to the survey, or if you have any questions about it. **The survey closes on 3 November 2024.**

### **Teachers excess service update**

We meet regularly with representatives from MHCLG, the Department for Education and Capita to discuss the operation of the McCloud remedy for teachers with excess service. You can read more about how the remedy will apply to these members in [Bulletin 229](#).

The early stages of the process involve Teachers' Pensions (TP) identifying members in scope and verifying their excess service with employers. Employers were contacted in stages based on region. The [updated timetable for excess service cases](#) confirms when initial communications and reminders have been or will be sent.

Some employers have completed these early stages and are ready to move on to the next steps. We are not ready to start the next steps yet. In broad terms, the next steps will be:

1. LGPS administering authorities to contact employers that have not yet verified the data supplied by TP. To move on to this step, administering authorities will need to know which schools have teachers with excess service, and which have not yet responded to TP requests.
2. LGPS administering authorities gather the data they need to set up an LGPS record for members in scope from employers. Members will be protected by McCloud so authorities will need to collect both CARE and final salary information.
3. LGPS administering authorities request employee and employer contributions plus interest from TP.

The same spreadsheet can be used for steps 2 and 3 above. We are waiting for the final version of the spreadsheet to be approved by TP. We will share it with you as soon as it is approved. Using the same spreadsheet for both steps should reduce the risk of errors that could occur when copying data from one spreadsheet or system to another.

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## Pensions dashboards ('dashboards')

### DWP Ministerial Statement on dashboards

On 22 October 2024, DWP published a [written statement](#) on dashboards. The statement confirms the Government's commitment to the [existing timetable](#) for connecting schemes to the ecosystem. This is expected to begin in April 2025 with an overall legislative deadline of 31 October 2026.

The statement also describes the progress made by the Pensions Dashboards Programme (PDP) and the Government's confidence in the PDP to deliver against the timescales. PDP has been instructed to focus its efforts on the connection and launch of the MoneyHelper dashboards service before turning to the work of connecting commercial dashboards. This is to facilitate helping the public to realise the benefits of using a dashboard at the earliest opportunity.

### PASA dashboards toolkit

On 14 October 2024, the Pensions Administration Standards Association (PASA) published the first content in its new '[Dashboards Toolkit](#)'. The Toolkit will be updated over time with the first release including a:

- questionnaire for trustees to issue to their AVC providers in advance of connecting their scheme AVCs to dashboards
- checklist and suggested list of activities for administrators to connect to and maintain AVC data
- list of AVC providers and their connection methods – this will be of particular interest to administering authorities. Some providers have indicated they will only use the 'single source' approach whilst others will only use the 'multiple source' approach. Several providers have indicated they will use either.

### PDP progress update webinar – 6 November 2024

On 6 November 2024, PDP will deliver a [progress update webinar](#).

### PDP publishes further resources

PDP has published further resources covering:

- [guidance on the step-by-step connection journey](#) for organisations connecting directly to the ecosystem
- [support for testing connection to the ecosystem](#) - including the system test pack and guides
- more answers to [queries on connection timelines and registration codes](#).

To keep up to date with PDP publications [subscribe to their monthly newsletter](#).

### **TPR data quality engagement – from October 2024**

From 15 October 2024, the Pensions Regulator (TPR) will contact pension schemes, in scope of dashboards, to make sure they have the right processes and controls in place around their data. They will challenge those schemes that are unable to demonstrate how they meet TPR’s record-keeping expectations and provide information about regulatory action that may be taken.

Data quality is critical to the success of dashboards. Without good data, savers may not be able to find all their pensions or get an accurate picture of the value of their savings to help them plan for retirement.

TPR’s record-keeping expectations can be found in their [General Code](#), in force since March 2024.

### **TPR dashboards readiness survey – November 2024**

TPR will send all scheme managers two surveys at key points in their journey to their ‘connect by’ date, as set in [DWP’s guidance](#).

All PSPS schemes can expect to receive the first survey in November 2024.

It is important the surveys are completed and submitted. All survey responses are anonymous. They provide TPR with useful insights into industry readiness, and where any gaps in awareness and understanding may lie, in order to inform their approach.

### **TPR dashboards webinar – 26 November 2024**

TPR is hosting a [webinar on 26 November 2024 at 2:30pm](#). Industry experts will provide essential insights into dashboards duties and guidance on where schemes should be with their preparations. The webinar will also include a live Q and A session, giving the opportunity to engage directly with a panel of experts.

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## Training

### **LGPS Governance Conference 2025**

The LGPS Governance Conference is open for booking. It is taking place on 30-31 January 2025 at the Bournemouth Highcliff Marriott Hotel. You can join us in person or online.

The Conference is aimed at councillors and others who attend pension committees/panels and local pension boards. Previous attendees also include trade union and employer representatives, as well as officers.

You can view the programme and book on the [LGPS Governance Conference 2025 booking page](#). In person places are limited so we recommend booking early to avoid disappointment.

### **Fundamentals Training**

Our 2024 Fundamentals training is underway with events for day one having taken place in York, London and online.

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 LGPS administration, investment and governance. 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.

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 one half day.

Booking remains open for the below dates in this training series.

### **Booking your place**

We recommend early booking as places are limited. You can book online through the [LGA events website](#). 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 2: Online 21 and 28 November 2024](#)

Registration closes 13 November 2024.

[Fundamentals day 3: York 4 December 2024](#)

Registration closes 19 November 2024.

[Fundamentals day 3: London \(LGA offices\) 10 December 2024](#)

Registration closes 25 November 2024.

[Fundamentals day 3: Online 12 and 17 December 2024](#)

Registration closes 4 December 2024.

## **Training service**

All training events are available to book via the [LGA events website](#). 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.

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](mailto:training.lgps@local.gov.uk).

Our survivor benefits and insight training courses for 2024 are currently at capacity. However, there are still places available on:

### **Employer role training (England and Wales)**

- [6 December 2024 – online](#)

If you would like to be placed on the waiting list for any of our courses, email [training.lgps@local.gov.uk](mailto:training.lgps@local.gov.uk) with details of the course you would like to attend. Please also include how many places you require and the format - online or in person.

### **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.

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## LGPS England & Wales Scheme Advisory Board (SAB)

### Feedback on LGPS informer document

We reported in [Bulletin 252](#) that the SAB and the Institute of Chartered Accountants in England and Wales (ICAEW) had launched an [LGPS informer document](#) to explain the timeline and information flow for the triennial valuation and accounting and audit purposes.

Following publication, both the SAB and ICAEW welcome any feedback from scheme employers, their auditors and funds about:

- how the informer has been used and by whom
- whether the document is useful and meets its intended aim. If not, why not?
- what could be improved and whether there are further areas or topics which could be explored in an update to this document or via a new publication.

### Action for administering authorities

Please send feedback on the document to [sabsecretariat@local.gov.uk](mailto:sabsecretariat@local.gov.uk) and ask your auditors and employers to do the same.

### Funding Strategy Statement guidance - update

In [Bulletin 251](#) we reported that the SAB has been working on updating the guidance for funds to follow when reviewing their Funding Strategy Statement (FSS). This project is now close to completion and we hope the guidance will be available before the end of the calendar year.

Draft replacement guidance was approved at the joint Chartered Institute of Public Finance and Accountancy (CIPFA) and SAB Compliance and Reporting Committee (CRC) meeting on Monday 21 October 2024. The next steps are for the document to be approved by CIPFA's Public Financial Management Board on 7 November 2024 and for the Board to give its final approval at its meeting on 25 November 2024. It is hoped the Minister will adopt it as statutory guidance before the end of the calendar year.

The Board and the SAB secretariat team want to express their appreciation and thanks for the time and expertise provided by all members of the working group to create the guidance.

## **November meeting of pension committee chairs**

In [Bulletin 255](#), we reported that the SAB secretariat has arranged another meeting with pension committee chairs, chaired by SAB Chair, Cllr Roger Phillips. This followed an earlier meeting held in June 2024 to discuss pooling and other matters that are currently topical within the LGPS.

The meeting was originally scheduled for 14 October 2024 but has been pushed back until 5 November 2024 to accommodate the attendance of both Local Government Minister Jim McMahon and Pensions Minister Emma Reynolds.

On 10 October 2024, Joanne Donnelly sent an email to pension committee chairs advising of the date change and to remind chairs who had not responded about the event. So far, 63 funds have confirmed their attendance; however, we would appreciate the support of fund officers to check in with their chairs and encourage them to respond if they haven't done so already.

The meeting will take place online on 5 November 2024 at 6pm. It will last up to 90 minutes. An agenda will be issued beforehand to facilitate discussion.

### **Action for administering authorities**

Highlight the 10 October 2024 email from Joanne Donnelly with your pension committee chair and ask them to respond to [joanne.donnelly@local.gov.uk](mailto:joanne.donnelly@local.gov.uk) to be added to the meeting invitation.

## **SAB statement and investigation into further opinion on fiduciary duty**

The SAB is aware that a number of administering authorities have received letters alleging they are acting unlawfully by holding, and failing to divest from, investments in companies which have been linked to the ongoing situation in the Middle East.

To help administering authorities assess these accusations and respond appropriately, the SAB has sought leading Counsel advice on behalf of the Scheme. Specifically, SAB asked Counsel for an opinion on the allegation that funds might face future criminal action by the International Court of Justice or have liability in domestic law under the Terrorism Act 2000 or the International Criminal Court Act 2001, as a result of holding such investments. The [legal advice](#) is available on the [legal opinions and summaries page](#) of the SAB website.

The Secretariat hopes the advice will help authorities in responding to this, or similar, letters but advises authorities to seek their own legal advice in relation to their specific circumstances and investments. The advice is also limited to the question of whether any specific criminal liability attaches to the holding of these investments, and not whether it is appropriate for funds to choose to divest.

## **Submit your fund annual report for 2023/24 - reminder**

The SAB publishes fund annual reports on its website and uses the data in them to compile the Scheme Annual Report. Administering authorities should send completed reports for 2023/24 to [sabsecretariat@local.gov.uk](mailto:sabsecretariat@local.gov.uk) – these can be draft or final reports.

## **SAB website**

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

- [a summary of the last Board meeting](#)
  - [latest news](#)
  - [SAB meeting and agenda papers](#)
  - [committee meetings and agenda papers](#)
  - [Responsible Investment Advisory Group meetings and agenda papers.](#)
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## **HMRC**

### **Pension schemes newsletter 163**

On 24 October 2024, HMRC published [pension schemes newsletter 163](#). Of particular interest to administering authorities are articles covering:

- the abolition of the lifetime allowance – also see our next article covering the newly laid regulations
  - new payroll data reporting items for pension commencement excess lump (PCELS) sum and stand-alone lump sum
  - change to the process for taxing PCELS
  - 2024/25 pension scheme return.
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## **HMT**

### **The Pensions (Abolition of LTA Charge etc) (No 2) & (No 3) Regulations 2024**

On 7 and 9 October 2024, the [Pensions \(Abolition of Lifetime Allowance Charge etc\) \(No 2\) Regulations 2024](#) and the [Pensions \(Abolition of Lifetime Allowance Charge \(No 3\) Regulations 2024](#) were laid. At the time of publishing this bulletin the No 3 regulations are still in draft.

Both sets of regulations will come into force on 18 November 2024 and have effect from the tax year 2024/25.



The regulations amend the Taxes Management Act 1970, the Income Tax Earnings and Pensions Act 2003, the Finance Act 2004 and secondary legislation. The changes include:

- minor corrections relating to LTA protections
- new provisions covering Transitional Tax-Free Amount Certificates (TTFAC) and the calculation to determine the value of member's benefits when paying a Trivial Commutation Lump Sum (TCLS).

You can view a full list of the changes in [pension schemes newsletter 163](#). We will update the Abolition of the LTA administrator guide when we have reviewed the legislation.

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## TPO

### **Deputy Pensions Ombudsman appointment extended**

The Department for Work and Pensions (DWP) has extended Anthony Arter's appointment as the Deputy Pensions Ombudsman for a further three months from 16 October 2024. This is to ensure continuity of service while a recruitment exercise for a new Deputy is concluded.

### **Ombuds Day**

The 10 October 2024 was Ombuds Day. The Pensions Ombudsman (TPO) celebrated this day with a [blog raising awareness and understanding of TPO services](#).

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## TPR

### **Scams awareness week**

In October 2024, in association with the Pension Scams Action Group (PSAG) the Pensions Regulator (TPR) launched a [new video](#) featuring a critical care nurse who was scammed out of her retirement pension. This follows the publication of the [case report](#) detailing how 245 victims were defrauded in a £13.5 million scam.

TPR encourages administrators to:

- consider if they are doing enough to protect members
- educate their members by sharing the [new video](#)
- take the [pledge to combat pension scams](#)
- [avoid and report pension scams](#) to action fraud.

## Unlocking power of digital, data and technology

On 22 October 2024, TPR published its [digital, data and technology strategy](#). The strategy is a blueprint for how TPR and the industry should adapt to, and embrace, changing technology and a changing pensions market to drive better outcomes for savers.

It aims to:

- reduce unnecessary burden on pension schemes
- enable effective market competition
- help TPR innovate and create an environment which encourages pension schemes to do the same in savers' interests.

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## Legislation

### Statutory Instruments

- The Pensions (Abolition of LTA Charge etc) (No 2) Regulations 2024 [SI [2024/1012](#)]
- The Pensions (Abolition of LTA Charge etc) (No 3) Regulations 2024 [SI [2024/draft](#)]

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## 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.

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## LGPS pensions section

### Raising a query

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

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

Telephone: 07766 252847

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

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

Telephone: 07979 715825

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

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

Telephone: 07827 307003

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

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

Telephone: 07780 227059

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

#### **Lisa Clarkson (Senior Training & Development Adviser – LGPC Secretariat)**

Telephone: 07464 532596

Email: [lisa.clarkson@local.gov.uk](mailto:lisa.clarkson@local.gov.uk)

#### **Toni Durrant (Training & Development Adviser – LGPC Secretariat)**

Telephone: 07385224553

Email: [toni.durrant@local.gov.uk](mailto:toni.durrant@local.gov.uk)

#### **Karl White (Training & Development Adviser – LGPC Secretariat)**

Telephone: 07464 652886

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

#### **Holly De-Buriette (Programme Support Officer (Pensions) – LGPC Secretariat)**

Email: [holly.de-buriette@local.gov.uk](mailto:holly.de-buriette@local.gov.uk)

**Jeremy Hughes (Senior Pensions Secretary - LGPS SAB England & Wales)**

Telephone: 07960 513946

Email: [jeremy.hughes@local.gov.uk](mailto:jeremy.hughes@local.gov.uk)

**Becky Clough (Board Support & Policy Officer – LGPS SAB England & Wales)**

Telephone: 07795 410793

Email: [becky.clough@local.gov.uk](mailto:becky.clough@local.gov.uk)

**Ona Ehimuan (Pensions Secretary (Governance and Digital) – LGPS SAB England & Wales)**

Telephone: 07501 088144

Email: [ona.ehimuan@local.gov.uk](mailto:ona.ehimuan@local.gov.uk)

**Sarah Tingey (Research & Data Analyst – LGPS SAB England & Wales)**

Telephone: 07548 952802

Email: [sarah.tingey@local.gov.uk](mailto:sarah.tingey@local.gov.uk)

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