

The Local Government Pensions Committee
Secretary: Jeff Houston

CIRCULAR

Please pass on sufficient copies of this Circular to your Treasurer/Director of Finance and to your Personnel and Pensions Officer(s) as quickly as possible

No. 264 – NOVEMBER 2012

LGPS PRACTITIONER AND EMPLOYER TRAINING EVENTS

“UNDERSTANDING” WORKSHOPS

Purpose of this circular:

1. This Circular has been issued to advise administering authorities and employers participating in the Local Government Pension Scheme of a number of workshops to be run at various locations across Great Britain. These events have been organised by the Local Government Pension Committee (LGPC).

Background

2. For a number of years the LGPC has held numerous one-day topic-specific Understanding workshops covering various aspects of the Local Government Pension Scheme and associated compensation provisions. The majority of these workshops are cycled to run every 18-24 months.
3. As many of these workshops are hands-on and contain practical exercises, the “class” size is usually kept to a maximum of 12/15 people to ensure that delegates get the most out of the learning experience.

Details of workshops

5. The next topic-specific Understanding workshops are to be run between January and March 2013 and cover the subjects 'Death & Survivor Benefits', 'Pension Sharing on Divorce' and 'Guaranteed Minimum Pensions'.
6. All of these workshops have been run previously, some several times between 2003 and May 2011, but they will be updated for 2013 in line with changes in legislation and/or guidance issued since the workshops were last run. In addition, all practical exercises are being revisited, refreshed and updated where necessary.
7. In order to continue the LGPC's plan to deliver training as locally as practicable, the forthcoming workshops are to be held in a number of locations across the country. In putting together the entire schedule, the Secretariat has attempted to be as 'geographically' fair as possible, including the use of not only constantly popular locations but also some that have been suggested by past delegates.
8. With reference to events for Scottish administering authorities and employers, it was agreed at Scottish Pensions Liaison Group in December 2010 that demand should be canvassed in advance of any bespoke workshops in Scotland being organised. Any such events will be arranged separately and announced directly to Scottish administering authorities and via them to employers where necessary.
9. At the Understanding workshops, delegates have the benefit of an experienced tutor and a detailed workbook they can take away for future reference. Each workshop will involve several practical exercises and all necessary delegate material, including calculators, will be provided. The workshops will start at 10:00 a.m. and finish no later than 4:00 p.m., with lunch and refreshment breaks included as well as coffee/tea on arrival from 9:30 a.m. As the workshops are delivered "locally" this should avoid the time and expense of overnight stays for many delegates.
10. Further details on course content, locations and dates can be found in **Appendix A** attached to this Circular.

Intended Audience for 'Death and Survivor Benefits'

11. These workshops are primarily aimed at Administering Authority staff in England and Wales who deal with, or need to learn about, the benefits provided on and following the death of a scheme member. It is possible that some "hands-on" Employing Authority staff may also benefit by attending. The workshop will cover benefits under the new and old Local Government Pension Schemes because, as potential delegates should be aware, the regulations under which a person's retirement benefits were calculated generally govern the benefits payable on their death.

Intended Audience for ‘Pension Sharing on Divorce’

12. These workshops are solely aimed at Administering Authority staff who deal with, or need to learn about, the overriding provisions on pension sharing on divorce and how the mechanics of this works in the Local Government Pension Scheme. It is improbable that Employing Authority staff would benefit by attending.

Intended Audience for ‘Guaranteed Minimum Pensions’

13. These workshops are solely aimed at Administering Authority staff (including pensioner payroll staff) who deal with, or need to learn about, the overriding provisions about Guaranteed Minimum Pensions and how the mechanics actually work in the Local Government Pension Scheme. As well as covering all aspect of GMPs, the course covers in detail the changes from 6 April 2010 following the commencement of SPA equalisation and the knock-on effect to pensions increase calculations from then on. Anti-franking rules are covered including the later earnings addition which will feature more and more in retirement calculations because of the shift in State Pension Age. It is improbable that Employing Authority staff would benefit by attending.

Cost and booking

14. The delegate rate for each workshop, inclusive of lunch, refreshments and all delegate materials is £199 plus VAT at the standard rate.
15. Early booking is highly recommended as places are limited. Bookings are made via the on-line events booking facility which is part of the Local Government Group website at www.lge.gov.uk. Please be sure to note our cancellation policy contained in our Terms and Conditions which you will be asked to confirm you have read when completing your booking details on the booking events page. You will also need full delegate details to hand including the address to which the invoice for payment is to be sent. Purchase order numbers must also be provided if required by your organisation to pay invoices.
16. If the session at your preferred location is full and you do not wish to book on one at an alternative location, you are advised to enter your name on the reserves’ list at your preferred location. It is important to do so as, not only will you have a priority warning should any cancellations occur, but it also enables the LGPC to judge demand for future events or, on occasion, organise overflow events.
17. If you experience any difficulties in using the on-line website booking facility, please contact Elaine English, LGPS Executive Officer, by email elaine.english@local.gov.uk

ACTIONS FOR ADMINISTERING AUTHORITIES

18. All Administering Authorities are urged to copy this Circular to all employers in their Fund or bring the Circular to the attention of employers by directing them to it on the LGA website.

Tim Hazlewood
Pensions Training and Development Manager
19 November 2012

UNDERSTANDING...DEATH & SURVIVORS' BENEFITS

Course content covers:

- 1) **Death Grants**
 - In Service / Deferred / Pensioner
 - Absolute Discretion & Expression of Wish
- 2) **Death & Additional Voluntary Contributions**
- 3) **Widows pension:**
 - In Service / Deferred / Pensioner
- 4) **Widower's pension:**
 - In Service / Deferred / Pensioner
- 5) **Civil Partner's pension:**
 - In Service / Deferred / Pensioner
- 6) **The effect of Guaranteed Minimum Pensions**
- 7) **Nominated Cohabiting Partners' pensions:**
 - The process of nominating
 - The criteria for nomination
 - Evidence!
 - The benefits payable
- 8) **Childrens' pensions:**
 - Eligible Children
 - Benefits payable and for how long

Workshop locations & dates:

08 January	Exeter	Rougemont [Thistle] Hotel
15 January	London	St Ermin's Hotel
17 January	Leeds	Marriott Hotel
22 January	Birmingham	Jurys Inn Hotel
24 January	Cardiff	Marriott Hotel
29 January	Liverpool	Marriott Hotel
31 January	Durham	Marriott Hotel

UNDERSTANDING... PENSION SHARING ON DIVORCE

Course content covers:

1. Background and Overview
2. Earmarking Orders
3. The 4 stages in the Pension Sharing process
 - Information to be provided at each stage
 - Deadlines for compliance
 - Penalties for non-compliance
4. Valuing a scheme member's benefits
 - Cash Equivalent Transfer Value (CETV) basis
 - Cash Equivalent Valuation (CEV) basis
(for all Pensioners and some Active and Deferred members)
5. Calculating the Pension Debit and Pension Credit
 - Calculating the Debit and recording against 'tranches' of membership
 - Future application of the Pension Debit
 - Calculation of the Pension Credit
 - Paying the Pension Credit
6. Charging
7. Death, Transfers in and Transfers out
8. The Gender Recognition Act

Workshop locations & dates:

05 February	London	St Ermin's Hotel
07 February	Peterborough	Marriott Hotel
12 February	Liverpool	Marriott Hotel
14 February	Cardiff	Marriott Hotel
19 February	Birmingham	Jurys Inn Hotel
21 February	Leeds	Marriott Hotel
26 February	Exeter	Rougemont [Thistle] Hotel

UNDERSTANDING... GUARANTEED MINIMUM PENSIONS

Course content covers:

- 1) The background to Contracting-Out and the changes necessary to cater for the changes in State Pension Age**
- 2) The basis of calculating GMPs**
 - Accrual Rates
 - Earnings Factors
 - Method of revaluation of earnings factors
- 3) Revaluation of GMPs and Anti-Franking**
- 4) Increments where retirement deferred past 'pensionable age'**
- 5) The effect on Pensions Increase calculations**
 - At and after 'pensionable age'
 - GMPs accrued pre and post 1988
 - Interaction with State Additional Pension/Component
- 6) Survivor's GMPs**

Workshop locations & dates:

05 March	London	St Ermin's Hotel
07 March	Cambridge	Double Tree by Hilton Hotel
12 March	Cardiff	Marriott Hotel
14 March	Birmingham	Jurys Inn Hotel
19 March	Leeds	Marriott Hotel
21 March	Liverpool	Marriott Hotel
28 March	Exeter	Rougemont [Thistle] Hotel

Distribution sheet

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Pension managers (outsourced) and administering authority client managers
Officer advisory group
Local Government Pensions Committee
Trade unions
DCLG
COSLA
SPPA
Regional Directors
Private clients
Website

Visit the LGA's website at: www.lge.gov.uk

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