

LGPS Administrator Training

Session overview	Date/time
<p>Introduction to the LGPS</p> <ul style="list-style-type: none"> • Brief history of the LGPS • Roles and responsibilities – administering authority, scheme employers and other interested parties • Benefit structure – covering the 80ths, 60ths and CARE elements and a brief overview of the main benefits • How CARE works 	<p>22 March 2023 14.00 - 15.30</p>
<p>Governance</p> <ul style="list-style-type: none"> • Overview of governance structure • Role of the Pension Committee and Pension Board • Role of external organisations and interested parties 	<p>4 April 2023 10.00 - 11.30</p>
<p>Overview of membership and importance of data</p> <ul style="list-style-type: none"> • Overview of the importance of clean data • The impact poor data has on various aspects of administration and management of the Fund, including: <ul style="list-style-type: none"> - Pre 2014 final salary accrual - CARE accrual - Additional pension contributions - Service breaks - Annual benefit statements and pension savings statements - Funding valuations 	<p>20 April 2023 10.00 - 11.30</p>

Session overview	Date/time
<p>Hot topics</p> <ul style="list-style-type: none"> • An overview of relevant hot topics in the LGPS, currently including: <ul style="list-style-type: none"> – Good Governance – New Fair Deal – Regulator Code of Practice – Cyber security/scams – Pension Dashboards – McCloud – Goodwin – Revaluation of LGPS CARE pensions 	<p>10 May 2023 10.00 - 11.30</p>
<p>Internal Dispute Resolution Procedure</p> <ul style="list-style-type: none"> • Overview of LGPS 'first instance decisions' • LGPS pension dispute provisions • Role of the Pensions Ombudsman and the Early Resolution Service • Key learnings from Pensions Ombudsman determinations 	<p>24 May 2023 14.00 - 15.30</p>
<p>Transfers/Divorce</p> <ul style="list-style-type: none"> • An overview of the transfer rules, covering: <ul style="list-style-type: none"> – Transfers in and out from and to Club schemes and non-Clu scheme – Pension debits and credits following divorce 	<p>7 June 2023 10.00 - 11.30</p>
<p>Aggregation</p> <ul style="list-style-type: none"> • A high-level overview of aggregation, including the application of the various aggregation categories • Second session running through examples 	<p>22 June 2023 14.00 - 15.30 + 6 July 2023 14.00 - 15.30</p>
<p>Final Pay and APP</p> <ul style="list-style-type: none"> • Provide an appreciation of the different definitions of pensionable pay and how this relates to the assessment of final pay and assumed pensionable pay • Provide the fundamental tools to calculate final pay and assumed pensionable pay • Ensure an understanding of the employer and administering authority responsibilities and how these impact scheme members • Second session running through examples 	<p>31 August 2023 10.00 - 11.30 + 13 September 2023 14.00 - 15.30</p>

Session overview

Date/time

Retirement and Survivor benefits

- A high-level overview of the different means by which LGPS benefits can be paid, such as:
 - Age
 - Redundancy/efficiency
 - Voluntarily early
 - Flexible
 - Ill health
 - Death grants
 - Late retirement
 - Survivors - different types, qualifying conditions

28 September 2023

10.00 - 11.30

Ill health

- A more in-depth look at the ill health retirement provisions and the application of the various tiers, covering:
 - Employer and administering authority responsibilities
 - The decision-making process
 - The role of the Independent Registered Medical Practitioner (IRMP)
 - Overview of the tier 3 review process

12 October 2023

14.00 - 15.30

Outsourcing

- A general look at outsourcing in order to provide:
 - A broad overview of the main pension issues associated with employer outsourcing
 - An understanding of the scheme employer, service provider and administering authority responsibilities
 - A high level overview of the pension related risks associated with outsourcing
 - An understanding of the admission agreement process
 - Case studies - the “good” and “bad” approach to outsourcing

24 October 2023

10.00 - 11.30

Annual and lifetime allowance

- Overview of the current pension tax system
- High level run-through of annual allowance assessments, including scheme pays
- High level run-through of lifetime allowance assessments, including impacts of lump sum commutation
- Overview of member requirements/expectations

9 November 2023

14.00 - 15.30

