



Avon Pension Fund
Administered by Bath & North East Somerset Council

LOCAL GOVERNMENT PENSION SCHEME REGULATIONS 1997

STATEMENT OF POLICY CONCERNING EXERCISE OF DISCRETIONARY FUNCTIONS

ORGANISATION ... BATH SPA UNIVERSITY COLLEGE
(Please Print)

Regulation 7

(Allowing an employee to opt out of the LGPS and re-join more than once).

Details of Policy Concerning Resolution

A second return application for LGPS membership will be accepted automatically but a third or further option will be rejected on the grounds of unwarranted administrative effort and cost.

Date 25.6.98
Certified by [Signature]
Designation DIRECTOR

When complete please return to:

Mr B C Tanner, Pension Fund Manager, Avon Pension Fund, PO Box 9, Riverside, Temple St., Keynsham, Bristol, BS31 8LF





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Regulation 9

(Provision of widower's pension in respect of service between 1972-1988).

Details of Policy Concerning Resolution

The service of married female members from 1 April 1972 to 5 April 1988 which is covered by an election will be treated as service to be used in determining the amount of a widower's pension. The University College also agrees to accept late elections from any eligible female member. It will be assumed that such female employees will wish to elect unless they notify the University College to the contrary.

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Regulation 15 Employer's discretion to reduce member's contribution rate

If a member has at least 40 years total membership in local government employment an employer may grant the employee a contributions holiday or a reduction in contributions.

Details of Policy Concerning Resolution

Regulation 15

(To reduce or waive employee contributions for those with 40 or more years local government membership).

The University College will waive an employee's pension contributions when he/she has achieved 40 years local government membership of the local government pension scheme and is unable to accrue additional pensionable service, however should the employee continue in employment beyond the age of 60, contributions will be reinstated where further service could be accrued to a maximum of 45 years at age 65.

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Regulation 31 Elections for early payment of benefits (Members leaving between the ages of 50 and 60)

An election by a member aged 50 or over but under 60 to receive early payment of benefits is not effective without the consent of the employer or former employer.

If the age and total membership of the member do not satisfy the 'Rule of 85, the benefits are subject to actuarial reduction.

An employer may determine on compassionate grounds that unreduced benefits should be paid.

Details of Policy Concerning Resolution

Applications for early release of benefits from employees between the ages of 50 to 59 inclusive will only be accepted in cases where it can be demonstrated as being in the University College's best interests; or where there are compassionate grounds for the early release of pension benefits (see below).

In cases where the early release of pension benefits is approved, actuarial abatement will be applied to the pension benefits if the sum of the employee's age and pensionable service is less than 85 years.

Compassionate Grounds

Where an employee makes application on compassionate grounds for early payment of benefits after age 50 with no early retirement reduction (where the 85 year rule is not satisfied), the University College will examine each case on its merits taking into consideration, inter alia:

- The likely period the "compassionate grounds" will last into the future.
- The nature and reason for the employee leaving.
- The member's or deferred pensioner's age and period of LGPS membership.
- What income the person is receiving from other sources.

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Regulations 52 & 143 Increase of the total membership of a member leaving employment at or after the age of 50

An employer may resolve to increase the total membership of a member who leaves employment at or after reaching the age of 50.

A resolution may only be passed during the period of one month before the date of leaving or 6 months after that date.

If benefits have been awarded under the Local Government (Discretionary Payments) Regulations 1996 or ill health enhancement has been awarded membership cannot be increased under this Regulation.

An employer may resolve to convert a period of service credited under the Local Government (Discretionary Payments) Regulations 1996 to increased membership.

Details of Policy Concerning Resolution

The University College notes the new discretion to augment an employee's pension benefits on retirement but has no intention to make general use of this discretionary power. However, the University College may wish to consider its use in exceptional cases in the future, where there may be potential advantage to both employer and employee.

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BATH & NORTH EAST SOMERSET



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Regulation 53 Increase of the total membership of a new member

An employer may resolve to increase a new member's total membership, but such a resolution may only be passed within 6 months of the date he/she became a member.

Details of Policy Concerning Resolution

The University College has no intention to make general use of the discretionary power to augment an employee's service within 6 months of joining the scheme but may wish to consider its use in exceptional cases in the future.

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Regulation 67 Establishment of shared cost AVC schemes

An employer may resolve to establish such an arrangement (SCAVC)

The resolution must specify who is and who is not eligible to participate in the SCAVC.

It must also specify whether the SCAVC may be used to provide death benefits.

The employer must also specify amount of the contributions which he will contribute to the SCAVC.

Details of Policy Concerning Resolution

The current facility to allow members of the Local Government Pension Scheme to make Additional Voluntary Contributions, which is provided by Equitable Life Assurance Company will continue. The University College does not intend to set up a Shared Cost AVC scheme in the foreseeable future.

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