

# LGPS Employer Newsletter

Avon Pension Fund, Local Government Pension Scheme  
Administered by Bath & North East Somerset Council  
ISSUE 06 WINTER 2011



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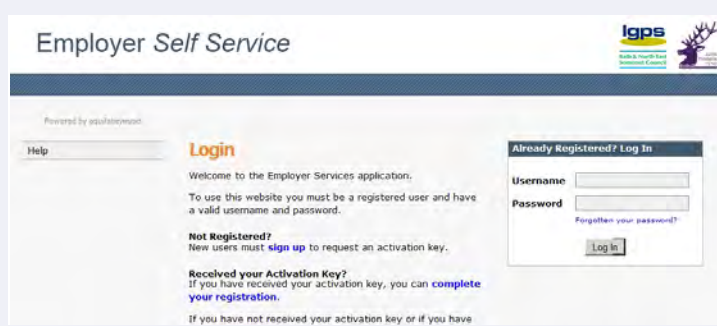
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## Employer Self-Service (ESS) facility - LGPS 53 Authorised Contacts form



So that APF has an up-to-date record of Scheme Employers' authorised contacts for pensions, it is also an Audit requirement that a new LGPS 53 form is completed every two years.

Any Scheme Employer which needs to complete and return a new LGPS 53 form can download one from the Forms section of the Employers Area of the APF website.

Scheme Employers are reminded that they must complete a new LGPS 53 form in order to use Avon Pension Fund's (APF) Employer Self-Service (ESS) facility. The form has been updated to include a section for Scheme Employers to nominate officers to have 'online access' to the electronic services provided by APF.

### Employer Self-Service

<https://employers.avonpensionfund.org.uk/>

### Employer Forms

<http://www.avonpensionfund.org.uk/employers/forms.htm>



**Employers Website Link**

**Avon Pension Fund, Floor 3 South, Riverside,  
Temple Street, Keynsham, BS31 1LA**

Tel: 01225 477000  
Fax: 01225 395258  
Email: [apf\\_communications@bathnes.gov.uk](mailto:apf_communications@bathnes.gov.uk)  
Web: [www.avonpensionfund.org.uk](http://www.avonpensionfund.org.uk)



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## Your organisation's Lead Officer for pensions

The Pensions Administration Strategy, which outlines the way in which Scheme Employers and Avon Pension Fund (APF) work together to provide a seamless, efficient and cost-effective pensions service for stakeholders, specifies that Scheme Employers will appoint a Lead Officer to be their primary liaison with the Fund.

The Lead Officer's role is to ensure that APF is provided with all of the information it needs to administer the LGPS, and that information which APF sends to the Scheme Employer is communicated to appropriate key officers within the Scheme Employer, in a timely manner.

If your organisation has not yet appointed a Lead Officer to be your primary liaison with the Fund you can download an **LGPS 53A** 'Appointment of a Lead Officer' form from the Forms section of the Employers Area of the APF website.

**Avon Pension Fund**  
LOCAL GOVERNMENT PENSION SCHEME  
10th & North Gate Somerset Council  
11th & South, Riverside, Temple Street, Keynsham, BS31 1LA  
Tel: 01225 477000 - Fax: 01225 562250 - Email: [apf@avonpensionfund.gov.uk](mailto:apf@avonpensionfund.gov.uk)  
Web: [www.avonpensionfund.org.uk](http://www.avonpensionfund.org.uk)

**APPOINTMENT OF LEAD OFFICER FOR THE LGPS** LGPS 53A-2011

In accordance with the Pensions Administration Strategy each Scheme Employer will appoint a Lead Officer for the LGPS (Local Government Pension Scheme).

**Role of the Lead Officer** – to be primary liaison between the Scheme Employer and Avon Pension Fund and facilitate the operation of a seamless, efficient and cost-effective pensions service for stakeholders.

**Responsibilities of the Lead Officer** – to ensure that Avon Pension Fund is provided with all of the information it needs to administer the LGPS, and that information which Avon Pension Fund sends to the Scheme Employer is communicated to appropriate key officers within the Scheme Employer, in a timely manner.

NAME OF SCHEME EMPLOYER: \_\_\_\_\_  
NAME OF LEAD OFFICER: \_\_\_\_\_  
JOB TITLE: \_\_\_\_\_  
DIRECT LINE TELEPHONE NUMBER: \_\_\_\_\_  
MOBILE TELEPHONE NUMBER: \_\_\_\_\_  
EMAIL ADDRESS\*: \_\_\_\_\_  
\*This email address must be monitored by an authorised contact of the Scheme Employer in the absence of the Lead Officer.

SIGNATURE OF LEAD OFFICER: \_\_\_\_\_  
Authorisation of Lead Officer appointment  
I hereby appoint the above-named to be Lead Officer for the LGPS\*

NAME: \_\_\_\_\_  
JOB TITLE: \_\_\_\_\_  
SIGNED: \_\_\_\_\_ DATE: \_\_\_\_\_  
\*This section must be signed by an officer of the Scheme Employer of Director level or equivalent.

COMPANY STAMP

LGPS53A(02/12/11).doc

## Academies training session on the Role of the Scheme Employer

Avon Pension Fund (APF) holds training sessions on the role of the Scheme Employer as a pensions administrator several times a year; and also at the request of Scheme Employers as resources permit.

APF is holding a training session aimed at the Finance, HR and Payroll officers of new Academies on the afternoon of **31st January 2012** in Keynsham. This session will also be appropriate for new Finance, HR and Payroll officers of existing Academies who require continuity training.

The session will be informal and consist of a presentation which covers Pensions Risk, the main roles and responsibilities of a Scheme Employer and administrative processes which should be followed, and delegates will have the opportunity to ask any questions they may have.

Academies should email [LGPS\\_Feedback@bathnes.gov.uk](mailto:LGPS_Feedback@bathnes.gov.uk) with the contact details of any Finance, HR and Payroll officers they wish to send on the training session. APF will then email delegates to confirm that they have a place and provide details of the session.

## Employers' Conference 2012

The 2012 Employer's Conference will take place on **Wednesday 8th February 2012** at the Novotel hotel in Bristol.

As the pensions agenda is currently dominated by the Government's proposals to reform public sector pensions, and the forthcoming auto-

enrolment requirements, we plan to include items at the Employers' Conference to update Scheme Employers on these areas.

A formal invitation to attend the 2012 Employers' Conference will be sent to your organisation in the near future with a copy of the programme.

## End of Year – 31st March 2012

'End of Year' is the term used to describe the exercise in which Scheme Employers and Avon Pension Fund (APF) work together to update the records of our Members who have paid into the occupational pension scheme during the year. APF will shortly contact each Scheme Employer to request details of the pensionable pay and pension contributions for each of their LGPS Members in a prescribed format so that it can be uploaded onto the Altair pensions system. Further information on End of Year procedures can be found in **Factsheet 25** in the Employers' Area of the APF website.

APF uses the data provided by Scheme Employers at 'End of Year' to issue a statutory Annual Benefit Statement (ABS) to each Member; which outlines the value of the pension rights they have built up in the LGPS. **End of Year 31st March 2012 is different to previous End of Year exercises because APF needs Scheme Employers to provide Member data by 30th April 2012** so that we can update and 'data-cleanse' Member pension records and issue ABSs by 6 October 2012, in line with HM Revenue & Customs' 'Annual Allowance' reporting requirements.

It is crucial that each Member's record is correct at End of Year otherwise the ABS they receive will not be an accurate reflection of the true value of their pension rights. In situations where a Member has received an incorrect ABS from an occupational pension scheme which over-stated the value of their pension rights, and the Member has acted in reliance on that information, past decisions of the Ombudsman have required the Member to be paid that over-stated benefit. If a Scheme Employer provides incorrect information to APF which results in additional costs falling on the Fund, any such cost will be recharged

## Avon Pension Fund Local Government Pension Scheme Employer Factsheet 25

### Administering the Local Government Pension Scheme

### End of Year Procedures

**End of Year Data - Year End 31st March XXXX - Annual Return**  
In February of each year the Avon Pension Fund will write to Scheme Employers to request data for their Members records. A summary of the required data is given below.

#### Electronic Submission of Year End Data

For those Scheme Employers who intend to submit their end of year data in electronic format (i.e. by EDI) the method of data submission will be as follows:

to that Scheme Employer in line with LGPS (Administration) Regulation 43.

**Are your LGPS Members' records up-to-date with hours per week and breaks in Membership?** Scheme Employers can prepare now for End of Year by using the reports in APF's Employer Self-Service facility (ESS) to check that each of your LGPS Members' records holds the correct hours per week; and also that any periods of unpaid leave (such as strike days) have been recorded as a break in LGPS Membership, if the Member has not paid pension contributions to reinstate those periods. If any of your LGPS Members' pension records need to be updated you must notify APF of the change on an **LGPS 3** form, or via your Electronic Data Interface (EDI) return.

<http://www.avonpensionfund.org.uk/employers/factsheets/index.htm>

## Member Pension Clinics 2012 – On Hold

For a number of years Avon Pension Fund has offered scheme employers the opportunity of hosting a pension clinic event for its members. Due to the current uncertainty surrounding pension scheme reform and the impact on members accrued future benefits, APF will not be generally offering employers members individual clinics during 2012. Should you wish to discuss this matter further please contact Geoff Cleak – Pension Benefits Manager.

## Hutton Road show/Presentations to Members

The fund is currently in the process of contacting employers with a view to arranging a series of presentations to scheme members on the effects of the proposed new scheme changes following recommendations by Lord Hutton. Presentations will last up to one hour and will include a Q & A session.

It is now anticipated that presentations will commence with employers from mid-February 2012 and run through to the end of March. In order to maximise attendance at these events APF will be available to hold sessions both during lunch breaks and after normal working hours. If you are interested in hosting a session for scheme members please contact Geoff Cleak for further information (email: [geoff\\_cleak@bathnes.gov.uk](mailto:geoff_cleak@bathnes.gov.uk) ).

## Monitoring Outsourcing Contracts

Scheme Employers which have entered into an Admission Agreement for their contractor to become a Transferee Admission Body in the Avon Pension Fund are reminded that they must proactively monitor adherence to the Admission Agreement and any pensions requirements of the commercial contract.

Important points which the outsourcing Scheme Employer must monitor include:

- Ensuring that the Finance, HR and Payroll officers of the Transferee Admission Body attend training with Avon Pension Fund.
- The admission of new employees working on the service contract to the LGPS (where the Admission Agreement is open).
- Where the Admission Agreement is covered by a Bond, that amount of the Bond is reviewed regularly and the Bond is renewed before it expires.
- That the last employee entitled to join the LGPS under the Admission Agreement has ceased employment, resulting in the ending of the Admission Agreement.
- That Avon Pension Fund is notified in good time that the commercial contract (and therefore the Admission Agreement) is coming to an end. Where pensions risk is borne by the contractor, this must be 18 months before the end of the commercial contract so that the Employer Contribution Rate can be adjusted to ensure, so far as possible, that there is neither a deficit or surplus at the end of the Admission Agreement.

Background information on pension requirements in outsourcing exercises can be found in the Outsourcings (TUPE) section of the Employers' Area of the APF website.

[http://www.avonpensionfund.org.uk/employers/outsourcing\\_tupe/index.htm](http://www.avonpensionfund.org.uk/employers/outsourcing_tupe/index.htm)

## Avon Pension Fund Annual Report 2010/11

Avon Pension Fund has recently issued the '**2010/2011 Annual Report**'. A copy has been emailed to each Scheme Employer and can also be downloaded from our website at <http://www.avonpensionfund.org.uk/financeandinvestments/annualreport/default.htm>

To download this document in PDF format visit:  
<http://www.avonpensionfund.org.uk/employers/newsletter/index.htm>