

Monthly Report

October 2023

LB Barnet Pension Fund

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1. Performance summary

Work completed

KPI's for the period - 01.10.23 to 31.10.23							
WORKTYPE	TOTAL CASES SEPTEMBER	TOTAL CASES OCTOBER	TARGET DAYS FOR EACH CASE	TARGET MET CASES	MINIMUM TARGET PERCENT	TARGET MET PERCENT	AVERAGE TIME TAKEN (Days)
AVC In-house (General)	3	4	20	4	85	100	2
Change of Address	21	27	20	27	85	100	1.74
Change of Bank Details	13	10	20	10	85	100	1.5
Death Grant to Set Up	4	5	10	4	85	80	65.2
Death In Retirement	18	15	10	13	85	86.67	7.73
Death on Deferred	1	3	10	3	85	100	6.71
Deferred Benefits Into Payment Actual	27	40	10	38	90	95	4.78
Deferred Benefits Into Payment Quote	28	37	35	36	85	97.3	29.84
Deferred Benefits Set Up on Leaving	90	144	20	90	85	62.5	103.09
Dependant Pension To Set Up	9	11	5	7	90	63.64	9.09
Divorce Quote	4	4	40	4	85	100	8
DWP request for information	1	1	20	1	85	100	3
General Payroll Changes	18	19	20	19	85	100	1.26
Initial letter Death in Retirement	18	15	10	14	85	93.33	11.13
Initial letter Death on Deferred	1	3	10	3	85	100	1.33
Interfund Linking In Actual	32	24	35	4	85	16.67	129.79
Interfund Linking In Quote	20	20	35	20	85	100	33.05
Interfund Out Actual	16	17	35	14	85	82.35	28.26
Interfund Out Quote	12	33	35	22	85	66.67	25.64

Life Certificate	7	0					
Monthly Posting	73	88	10	86	95	97.73	1.91
Pension Estimate	1	1	10	1	90	100	5
Phone Call Received	179	157	3	152	95	96.82	4
Refund Actual	18	20	10	20	90	100	2.4
Refund Quote	74	49	35	48	85	97.96	6
Retirement Actual	24	14	10	13	90	92.86	4.21
Retirement Quote	0	21	10	18	85	85.71	6
Transfer In Actual	4	0					
Transfer In Quote	16	21	35	20	85	95.24	22.76
Transfer Out Payment	0	1	35	1	85	100	5
Transfer Out Quote	27	9	35	8	85	88.89	16.56
Update Member Details	164	698	20	688	100	98.57	5.7
Totals	923 85.86%	1511				89.93%	

Comment – The KPI for Death Grant to Set Up was not met this month due to one case being processed outside the target days.

Comment – The KPI for Deferred Benefits Set Up on Leaving was not met due to the Team dealing with older cases. New work splits in the team have been introduced so that some of the Team are dealing with business-as-usual cases and some are now processing and checking the older cases to reduce the backlog.

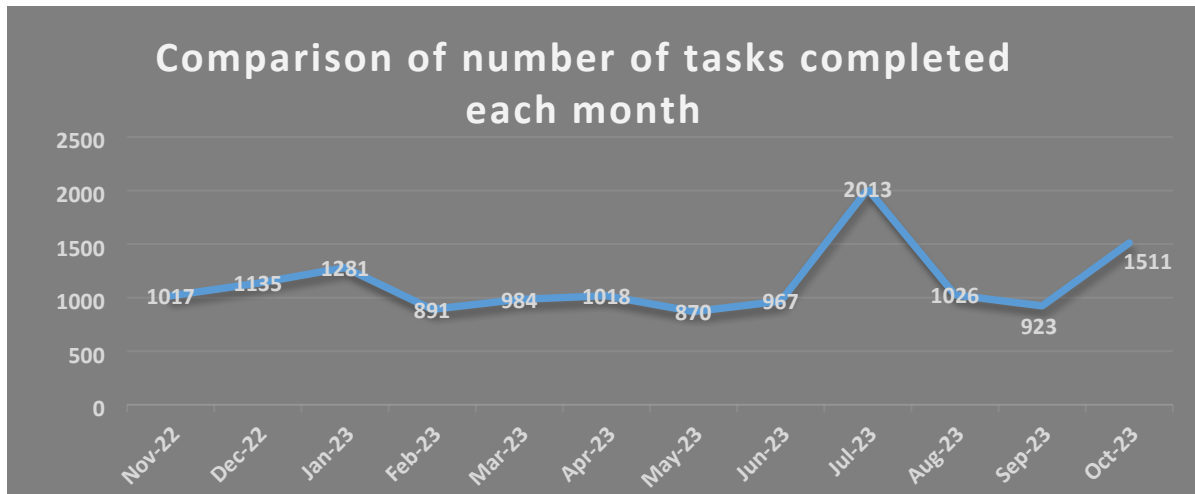
Comment - The KPI for Dependant Pension To Set Up was not met this month due to four cases which were all processed outside the target days. The dependants were all from the same family and it took some time to acquire all the information needed for each beneficiary before payment could be made.

Comment - The KPI for Interfund Linking In Actual was not met this month due to the Team have been processing older cases first for ABS purposes. There has also been an increase in the number of cases the Team have checked overall as they have increased resource and training of the new staff is going well.

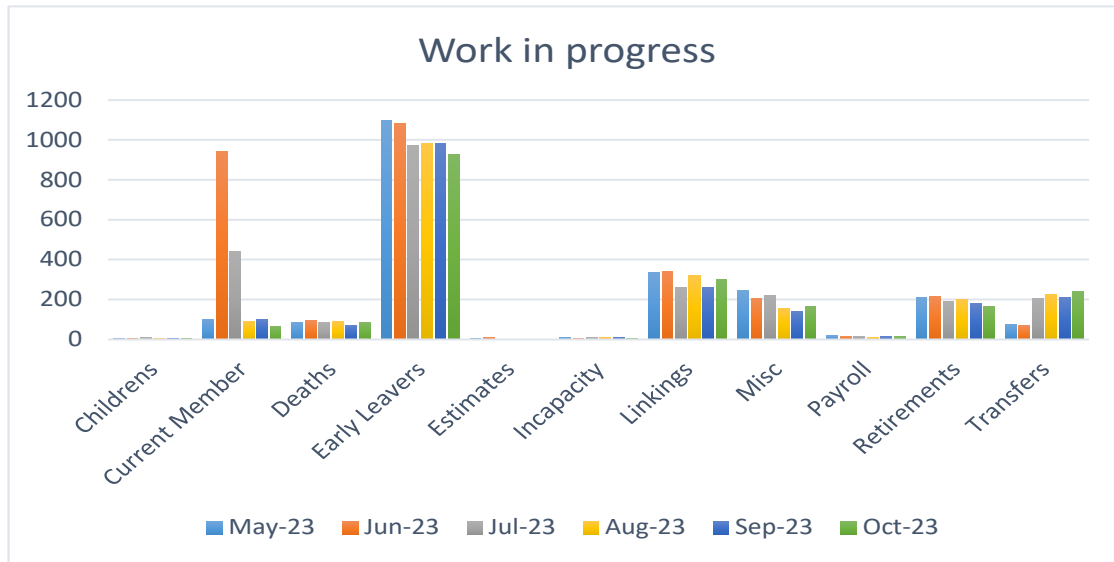
Comment – The KPI for Interfund Out Actual and Interfund Out Quote was not met this month as processing had been paused due to removal of GAD factors. There was also a delay by GAD in providing revised factors, these then had to be uploaded in UPM. The Team

are now working their way through the cases in the date order by which they had been put on hold.

Comment - The KPI for Update Member Details was not met this month due to a few cases which were processed outside the target days. However, overall the forms are dealt with well within the process target.

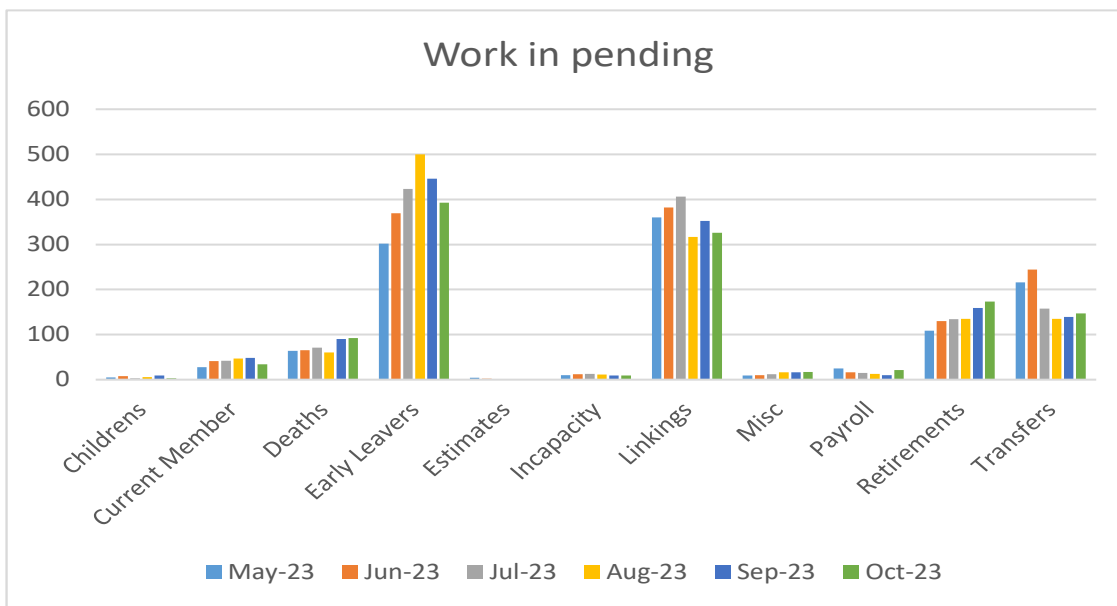


2. Work in progress



	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23
Childrens	3	5	7	3	4	5
Current Member	100	942	439	91	100	65
Deaths	84	93	84	87	72	83

Early Leavers	1,097	1,083	972	979	985	925
Estimates	5	7	0	1	1	1
Incapacity	9	6	7	7	7	6
Linkings	335	342	261	319	262	303
Misc	246	207	222	156	140	167
Payroll	19	16	15	9	13	13
Retirements	208	214	188	202	183	166
Transfers	77	68	205	227	208	238
Totals	2,183	2,983	2,400	2,081	1,975	1,972



	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23
Childrens	5	8	3	6	9	3
Current Member	28	41	42	47	48	34
Deaths	64	65	71	60	90	92
Early Leavers	302	369	423	500	446	393
Estimates	4	2	1	0	0	0
Incapacity	10	12	13	11	9	9
Linkings	360	382	406	317	352	326
Misc	9	10	12	16	16	17
Payroll	25	16	15	13	10	21

Retirements	109	130	134	135	159	173
Transfers	216	244	158	135	139	147
Totals	1,132	1,279	1,278	1,240	1,278	1,215

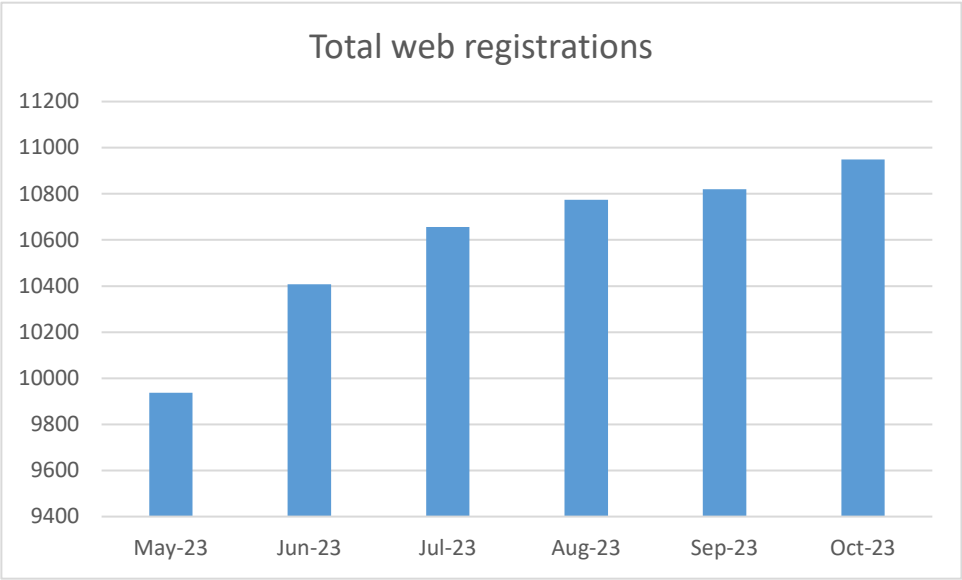
The tables above show processes grouped together and each group consists of a number of processes as shown below.

Childrens	Children's education review & children's pension age review
Current Member	Transfer in quote, changes to circumstances (breaks/hours etc.), annual allowance breach, AVC change, monthly postings mover, APC buying extra, divorce quote, query on record, waiting for documents, GMP notification
Deaths	Death in retirement, death in service, death on deferred, death grant to set up, death overpayment to recover, death notification
Early Leavers	Leaver notification, deferred benefit, refund quote, preserved refund
Estimates	Pension estimate, deferred estimate
Incapacity	Incapacity case
Linkings	Linking quote, linking actual, interfund linking quote, interfund linking actual
Misc	Member portal query, post received, phone log, age 75 approaching, enquiry needing a response, Finance Team referral
Payroll	Life certificate received, returned credit, BACS recall, 100 th birthday, Tracesmart, suspend Tier 3, update bank details, payroll changes, GMP notification
Retirements	Deferred retirement quote, retirement quote, Tier 3 ill health review
Transfers	Interfund out, transfer out, AVC transfer out

3. Member web registrations

The numbers of members signed up to member web are:

Status	Previous month	Current month
Active	4,155	4,179
Pensioner	3,873	3,915
Deferred	2,792	2,854
Total number	10,820	10,948



4. Administration update

a) New Academies/Schools

Completed 0

Ongoing 0

New enquiries this month - 0

b) New Admission Bodies

Completed 2

Ongoing 7

New enquiries this month – 1

Name	Start date	Current position	Date completed
Harrison Catering Services (Compton School)	30/10/2023	Request for admission – taking over contract from Caterlink. New employer record and process set up – 30/10/2023.	

Ongoing

Name	Start date	Current position	Last action taken	Date completed
Innovate (Blessed Dominic)	01/09/2019	Contact forms issued to the employer – 23/11/2022. Contacts set up – 09/12/2022. Contacts set up but new employer process not with Finance. PFR new employer process	Data uploaded to Hymans data portal – query raised with Hymans as unable to complete submission – 27/09/2023.	

		set up – 14/02/2023. Finance new employer process completed 23/02/2023. Awaiting contribution postings. Members records have been updated. Hymans require 2022 valuation data to be submitted. Contribution postings now up to date – 25/07/2023. Data to be submitted to Hymans.	Hymans to investigate as per meeting – 04/10/2023.	
Innovate (St James)	01/08/2019	Admission agreement with school for signing as per meeting with Mark – 13/09/2022. We have not received any contributions. Still outstanding as per Mark at meeting – 27/10/2022. E-mailed Richard Clarke (Finance) to confirm that we should move forward with getting contributions in and posted for this employer – 06/12/2022. Chased up – 17/01/2023. Data to be provided to Hymans as at 31/03/2022. Can't proceed yet as contributions not posted. Finance chasing up missing contributions from 01/09/2019 to 31/03/2020. Posting process for September 2019 has now come through and this has been ok'd for Finance to proceed with postings – 28/02/2023. The Finance Team queried with the employer on 08/06/2023 as we have received two identical January 2020 returns so this may have been uploaded twice by accident. Query responded to and postings are now being updated. They are currently updated to	Data uploaded to Hymans data portal – query raised with Hymans as unable to complete the submission – 27/09/2023. Hymans to investigate as per meeting – 04/10/2023.	

		March 2020. Monthly postings are now up to date – 18/07/2023. Data to be submitted to Hymans.		
Tenon (St Michaels)	01/04/2021	Member details sent to Mark Fox so he can issue a draft admission agreement – 16/06/2022. Admission agreement with Employer/School to sign and return. Agreed with Mark Fox at December meeting to proceed with new employer process. New employer contacts set up on employer record – 12/01/2023. Forms still with employer. Last e-mail from employer confirming request has been passed onto their payroll – 27/01/2023. Requested to provide data to Hymans as at 31/03/2022 at February 2023 meeting but authorised contact not yet set up so new employer process not yet passed to Finance for postings to proceed. The PFR confirmed	Mark Fox confirmed they will commence paying contributions in November – 19/10/2023.	

		on 06/03/2023 that he is chasing this up as we have received no response.		
Olive Dining (Holly Park School)	01/04/2023	Mark Fox emailed forms to employer for completion – 04/05/2023. New employer set up on UPM. Employer has provided details of employees involved – 26/07/2023. Data submitted to Hymans – 31/08/2023. Updated to active employer and new employer process referred to the Employer Relations Team – 27/09/2023.	Member records updated – 05/10/2023. Actual rate confirmed – 31/10/2023.	31/10/2023
Olive Dining (Danegrove School)	01/05/2023	Mark Fox has sent employer forms. He has requested confirmation of the member's involved – 20/06/2023. Employer has provided details of employees involved – 26/07/2023. Data submitted to Hymans – 31/08/2023. Updated to active employer and new employer process referred to the Employer Relations Team – 27/09/2023.	Member records updated – 05/10/2023. Actual rate confirmed – 31/10/2023.	31/10/2023
LBL After School Club (Manorside Primary)	01/09/2023	Provisional employer requested – 10/07/2023. Queries raised with regards to which posts are transferring as there are multiple employments – 31/08/2023.	Changed to active employer. Member records updated. Actuarial assessment completed – 19/10/2023. Querying company number to complete Pensions Regulator data.	
Capita CSG	01/12/2023	Potential new admission agreement required for group of staff within this employer WEF 01/12/2023. Data submitted to Hymans – 30/08/2023.		

Nourish Catering (Whitefield Secondary School)	01/08/2023	E-mail to IT to set up new employer – 30/08/2023. New employer process referred to Employer Relations Team – 27/09/2023.	Data submitted to Hymans – 30/10/2023.	
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c) Employers ceasing participation

Completed 2

Ongoing 6

Name	Date ceased	Current position	Last action taken	Date completed
Atlas Cleaning (St Michaels)	31/03/2021	Data to be submitted to Hymans for cessation. Members transferred to Tenon. Richard Quinn has been chasing the employer for outstanding leaver notifications – 01/06/2022. Leaver notifications received. Three members are involved. 1. Has a retirement quote but has not yet responded. 2. Linking quote on another record. 3. Pay figure requested – 21/07/2022. Referred to Service Centre – 05/01/2023. Confirmation that further information requested from employer for two of these leavers – 09/01/2023. Copy of e-mails sent to Mark Fox.	Three leavers till outstanding: <ol style="list-style-type: none"> 1. Linking outstanding to another post where a leaver notification has not yet been received. 2. Linking quote offered and deadline has now passed. 3. Pay figure requested but not received. <p>These have been referred to the PFR to chase up – 05/06/2023. Chased up with the PFR on 26/07/2023.</p>	

Atlas Cleaning (Claremont)	31/03/2022	End of contract. Leaver notifications requested – 12/07/2022. Chased up 05/09/2022. Issue raised re additional contributions deducted – 17/10/2022. Chased up – 24/11/2022. Agreed at December 2022 meeting to refer back to Service Centre to arrange to refund the additional contributions. Further e-mails with Mark Fox regarding the additional contributions – 16/03/2023. Mark confirmed at the meeting on 10/05/2023 that this should be shortly concluded.	Mark Fox confirmed at October 2023 meeting that he has to go back to the employer to discuss this further.	
City and County Healthcare Group	08/06/2022	Last member left and data submitted to Hymans – 17/04/2023. Revised data sent to Hymans as included pensioner that had not been updated to new employer – 29/06/2023.	Mark Fox confirmed at the October 2023 meeting this is now complete.	04/10/2023
Grasvenor Avenue Academy	31/08/2022	Academy closed. 19 leavers outstanding. 5 for which we don't have leaver notifications. Requested from EPM – 14/11/2022. Response received 28/11/2022 – EPM are querying that they cannot locate some of the members on the portal. Request to Service Centre Manager for leavers to be prioritised – 05/12/2022. Employer Relations Team have contacted the employer with outstanding queries – 26/05/2023.	Two remaining outstanding leavers – held up by outstanding linkings.	

		Outstanding cases to be reviewed with the PFR. Some cases are being held up by outstanding linkings.		
Alliance in Partnership (Osidge)	31/07/2022	Final member was sent a retirement quote – 18/04/2023. Agreed at June 2023 meeting to leave it to the end of the month and if the member has not claimed benefits to submit data based on standard benefits. Member was a redundancy retirement so cannot be deferred. Further data supplied to BW – pension benefits have now been claimed and are in payment for final member – 31/08/2023.	Cessation report produced – 31/10/2023.	31/10/2023
Capita RE	31/03/2023	Contract ending. Members transferring back to LB Barnet. Spreadsheet sent to Mark Fox – 16/02/2023. Discussed further with Mark Fox and Finance / Employer Relations to ensure that these records will be transferred back to LB Barnet from 01/04/2023. Records updated back to LB Barnet – 27/04/2023. CARE pension values need to be updated plus there are outstanding leavers. E-mail to Mark on 11/05/2023 detailing these cases.	Chased up leavers for completion with processes in place – 07/06/2023. <ol style="list-style-type: none"> 1. Query on pay 2. Deferred process, query on APC 3. Query on pay 4. Deferred process completed 	
Enigma Group	19/07/2023	Only active member left on 19/07/2023. Cessation process set up – 17/07/2023.	Deferred benefit process outstanding on the only active member – 29/09/2023.	

Caterlink (Compton School)	29/10/2023	Contract ended. 4 remaining active members transferred to Harrison Catering Services.		
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d) Other employer work

None

e) Internal Dispute Resolution Procedure (IDRP)

Stage 1

Completed 1

Ongoing 0

Date of appeal	Reason for appeal	Current position /outcome	Last action taken	Decision due	Date decision letter sent
25/08/2023	Appeal against incorrect notification of date on which benefits were due.		Acknowledgement sent – 30/08/2023.	Appeal turned down. Incorrect date that benefits were due notified by previous pension administrator but the correct date must be applied now.	16/10/2023

Stage 2

Completed 0

Ongoing 0

f) TPAS/Pensions Ombudsman

Date application received	Details of complaint	Current position / outcome	Date completed
07/06/2023	Appeal against not being allowed to transfer out.	Response sent 08/06/2023, opposing the allegations as the member only had entitlement to a refund on leaving and this had to be paid within 5 years of leaving. The request to transfer out was received after 5 years and therefore could not be processed and the refund was paid. However, acknowledged there had been errors and omissions by the previous administrator.	
28/07/2023	Appeal against service details held.	Response sent 09/08/2023 clarifying the outcome of Stage 1 & 2 appeals and stating that matters arising had been addressed from these. Querying what further actions the member is requesting. TPO have now confirmed that this case is concluded.	25/09/2023
11/09/2023	Appeal against decision on recipients of death grant.	Response sent 18/09/2023 explaining the decision-making process.	

g) Compensation cases – October to December 2023

None

h) Member issues

- **22101105** – Member had an interfund transfer in which included AVCs. Prudential confirmed the transfer but the AVC screen was not created and details input. Requested schedule from Prudential and AVC screen will be created and updated once received.
- **22016393** – Member retired and sent in pension claim form and birth certificate. The birth certificate had a different date of birth to her record but it was not updated. The pension benefits were recalculated using the correct date of birth and there was a very small overpayment which will not be recovered as it is under £100. A letter has been sent to the member to confirm the revised annual pension amount and to apologise for the error.

i) Employer issues

None

5. Membership numbers

Membership status	ACTIVES	DEFS	PENS	BENS	PRESERVED REFUND	LVRS OPTIONS PENDING
Numbers	9,664	9,504	8,524	1,030	1,395	366
Change from last month (+ / -)	+90	+69	+45	+1	-15	-63

6. Management overview

a) Staffing update

Finance – The two Finance Officers have started in the Finance Team and are currently being trained. There are no vacancies in the Team at the present time.

Service Centre – The adverts for the Senior Pension Officer & Pension Officer posts have now closed and shortlisting will commence shortly. Once this has been completed interviews will take place to fill the vacancies.

Employer Relations Team – There is one vacancy in the Employer Relations Team for a Pension Fund Representative which is an additional post within the Team. Recruitment to this post is still ongoing.


Technical Team - There is one vacancy in the Technical Team for a Technical Advisor which is an additional post. The post will be advertised in November.

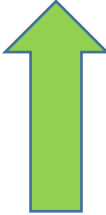
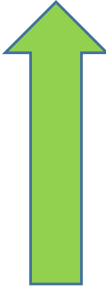
b) Ransomware test – further update



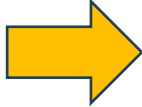
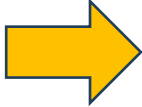
On 28/09/2023 WYPF undertook a mock ransomware attack and the day consisted of two scenarios with additional cyber issues being injected every hour. WYPF IT & Comms Team plus Bradford IT Team were observed for the full day by an external third party who specialise in intruder defence & cyber-crime. The LGA's Cyber Team were also present on the day.


We have now had early sight of the third-party report which is positive and in parts highly complimentary, a full report will be issued before Christmas.

7. Projects

Project	Description	Current position	Last action taken	Movement	Expected completion date
McCloud	To remove unlawful age discrimination identified in the McCloud ruling. It will provide eligible younger members with a protection equal to the protection provided to older members when the scheme was changed in 2014.	'Go Live' has gone ok with no hitches. Sargeant (Fire) is now on release 9 of the internal build and will resolve a mass majority of the problems but is having a knock-on effect on automation. We are still having issues with Civica.	<p>As outlined in the previous report our disclosure requirements for McCloud require all members be informed about the material change to the scheme following the remedy regulations that came into force on 1 October. We have confirmed our plans meet the disclosure requirements with the LGA, so a newsletter will be issued to all active, deferred and pensioner members in November plus a letter version of the newsletter to all 'electronic opt out' cases printed and posted to home addresses. The website continues to provide passive communications about McCloud too https://www.wyph.org.uk/mccloudsargeant-remedy/</p> <p>We continue to work with Civica to ensure UPM calculations take account of McCloud properly and the member portal will be updated in due course once the core calculations are fully updated and signed-off.</p>		Regulations introduced from 1 st October 2023

<p>Phase 3 (Monthly postings)</p>	<p>Move all the functionality onto the front-end website to enable Employers to process the data.</p>	<p>Four issues have been raised from the third penetration test. One is to do with coding and the other three are underlying server issues. These are all being resolved and we estimate that the resolution time is 4/5 weeks. A significant management presence has been brought to bear on this project.</p>	<p>Bradford IT Security Team are checking the latest amendments which were raised at the last penetration test. If this comes back with a 'clean bill of health' we will be able to 'go live'.</p>		<p>2023/2024</p>
<p>Pensions Dashboard</p>	<p>Will enable individuals to access their pension information online, securely and all in one place.</p>	<p>The first meeting with Bravura has gone well and the conversations was around the technical build. A meeting took place with 40 other providers and PDP and they have not yet finalised their technical brief. The Money and Pensions Service (MaPS) are holding a meeting with all ISP providers who will connect direct to the dashboard. We expect some update from this how this will resolve their issues. WYPF have met with DWP (Policy Advisors) and PDP (Technical Team) regarding AVC's. This has generated significant debate and DWP are currently assessing having unified dates for valuations between AVC providers and main Pensions Funds.</p>	<p>New staging dates are to be announced on 14/11/2023. We have been invited to PDP's announcement programme and we will communicate the outcome in due course. We have received the pre-publication draft of the LGA's Pension Dashboard LG guidance and we have provided comments back to them. The next formal update with TPR is the end of November to discuss the new staging dates and the expectations of TPR. AVC providers have confirmed that they will align to WYPF's annual benefit statement date.</p>		<p>2023/2024</p>

Key Performance Indicators (KPIs)	The KPI indicators have been developed in order to provide funds with the ability to self-assess against best practice benchmarks.	Due to the ongoing work with MP3, a meeting has yet to be arranged with IT to further progress the work still outstanding on the KPIs.	Some work has progressed with the KPIs and the retirement quote KPI has now been added. The linking KPIs are currently being looked at with a view to adding these in the near future. Further work is still needed on the KPIs but we are waiting for MP3 to go live before a meeting can be arranged with IT to progress this.		2023/2024
Data Improvement Plan	Data falls into 2 categories: Common & Scheme Specific (also known as Conditional)	The IT Team have completed the GMP reconciliation for WYPF & LPF and this plus the other work on GMP will be fed into the data quality scores pre-Christmas and will be reflected in the scores in due course. This has been a sizeable piece of work carried out by the IT Team.	We are still waiting for the Norfolk Framework which will help sort out address and postcode queries, this should be available next February.		As per Data Improvement Plan
Website	WYPF's website has not been redesigned since the introduction of the CARE scheme in 2014. Change is needed to improve: member journeys, brand identity, diversity of media and accessibility.	Development has commenced on an Umbraco 10 project, the long-term support version which will be supported for updates through to 2025. Scope agreed and design underway. Working on API connection between the front and back-end systems.	Main website - Website structure approved and next phase of design underway. Portals - API connection build in progress. Front-end design moved on from sketches to lo-fi wireframes.	 	Site live by the end of the calendar year (2023) Portals live by the end of the calendar year (2023)

Automation	UPM Automation is the project to automate some of the work currently being done manually by administrators within the Service Centre.	Automation has been implemented for monthly postings and flexible retirement as part of MP3. Also working on automation of deferred benefits.	The linkings automation has reduced backlog queues from over 8,000 to circa 2,000 cases. The vast majority are interfund transfers which cannot be automated. On a month-to-month basis, automation is currently taking half the linkings workload. A report on automation to follow in due course.		Ongoing
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8. Regulatory update

[LGPC Bulletin 243 October 2023 \(lgpslibrary.org\)](#) has now been published, please take a few minutes to read the bulletins.

LGPS England & Wales

LGPS statistics for 2022/23 published

On 25 October 2023, the Department for Levelling up and Communities (DLUHC) published the [LGPS statistics for England and Wales: 2022 to 2023](#).

Highlights include:

- total expenditure was £15.2 billion, an increase of 5.1 per cent on 2021/22
- total income was £17.3 billion, an increase of 8.5 per cent on 2021/22
- employers' contributions amounted to £8.4 billion, an increase of 7.8 per cent on 2021/22
- employee contributions were £2.8 billion, an increase of 9.5 per cent on 2021/22
- the market value of the LGPS funds at the end of March 2023 was £357.2 billion, a decrease of 1.9 per cent
- there were 6.2 million scheme members on 31 March 2023: 2 million active members, 1.9 million pensioners and 2.3 million deferred members
- there were 87,129 retirements, a decrease of 8 per cent compared with 2021/22.

McCloud update

Public service pensions remedy newsletter

HMRC has published [the remedy newsletter – October 2023](#).

The newsletter introduces the '[Calculate your public service pension adjustment service](#)'. This is for members who need to correct their tax position because of the McCloud remedy. The service will help members to:

- work out any repayments they are due for a lifetime allowance or annual allowance charge they have previously paid
- work out new, reduced or extra lifetime allowance or annual allowance charges that they may have to pay
- submit information for HMRC to review.

The newsletter also announces the launch of:

- [interactive guidance for members](#) to check if they are affected by the McCloud remedy
- [full guidance on the remedy for members](#)
- [full guidance on the remedy for administrators](#).

The guidance for administrators covers the pension tax rules they need to follow when implementing the McCloud remedy.

Compensation cases

The Department for Levelling Up, Housing and Communities (DLUHC) would like to know if administering authorities receive any applications for McCloud compensation.

For example, an authority might receive an application from a member who overpaid an annual allowance charge that HMRC will not refund.

Action for administering authorities - Send depersonalised details of each case to lgpensions@levellingup.gov.uk.

Dedicated areas of member websites

We have created new areas in the member websites dedicated to the McCloud remedy for England & Wales and Scotland.

The new pages include:

- a short video
- frequently asked questions
- an interactive 'Am I affected?' tool
- examples of how members might be affected
- detailed information about how the remedy will affect different types of members.

Please publicise the new McCloud pages to your members and employers:

- [LGPS \(England and Wales\) McCloud for members](#)

Initial prioritisation policy

On 12 October 2023, on behalf of DLUHC, we emailed administering authorities in England and Wales. The email included a link to DLUHC's initial policy on how to prioritise cases affected by the McCloud remedy.

The policies are not yet final. They will be discussed with the McCloud statutory guidance working group. DLUHC will also consult on the policies before a final version is issued early next year.

You can view each policy on the:

- [Administrator guides and documents page \(England and Wales\)](#)

Interfund transfers and the underpin

Certain transfers for members with underpin protection are on hold until the actuarial guidance for transfers is updated for the McCloud remedy. DLUHC confirm:

- administering authorities can continue paying interfund transfers for members with underpin protection using the methodology in the current actuarial guidance
- authorities will not need to review these payments when the guidance is updated.

The sending authority must make sure they provide the receiving authority with the information they need to perform accurate underpin calculations. The sending authority should have:

- loaded any hours changes and service breaks for the remedy period,
- validated that information, and
- if the member is over age 65, supplied the provisional underpin amount, provisional assumed benefits and the underpin date.

It should not be necessary for the receiving authority to take any additional steps to verify the information they receive. On 24 October 2023, Rachel Abbey emailed administering authorities in England and Wales to tell them about this approach.

You can find the actuarial guidance on the:

- [Actuarial guidance page \(England and Wales\)](#)

Action for administering authorities - Apply the approach set out by DLUHC for interfund transfers.

McCloud survey

On 20 October 2023 Jayne Wiberg, on behalf of the National LGPS Technical Group, emailed administering authorities with a McCloud survey. The survey closes on 23 November 2023.

The survey gathers information about administering authorities progress in implementing the McCloud remedy.

All results are published anonymously and shared with the relevant Scheme Advisory Boards and the Pensions Regulator. You can see results of previous surveys on the:

- [Technical group page \(England and Wales\)](#)

We strongly urge authorities to complete the survey so the Technical Group has a full picture of the implementation progress across England & Wales, Scotland and Northern Ireland.

If you have not received the survey and believe you should have done so, please contact jayne.wiberg@local.gov.uk.

Action for administering authorities - Complete the survey by 23 November 2023.

Other news and updates

September 2023 CPI rate announced

On 18 October 2023, the Office for National Statistics announced the [Consumer Prices Index \(C P I\) rate of inflation for September 2023 as 6.7 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 C P I in September of the previous year. We await confirmation from Government that the revaluation and pensions increase that will apply to L G P S active pension accounts, deferred pensions and pensions in payment in April 2024 will be 6.7 per cent

LGPS Governance Conference 2024

Booking is now open for the LGPS Governance Conference 2024.

The conference will take place on 18 and 19 January 2024 at the Principal Hotel in York. You can attend the conference in person or join us online.

The conference is aimed at councillors and others who attend pension committees/panels and local pension boards. Past delegates include trade union and employer representatives as well as officers who attend and support committees.

Cost

In person - £525 plus VAT. The price is inclusive of overnight accommodation and all meals.

Online - £400 plus VAT.

You can book and view the programme using the links below.

- [book to attend in person](#)
- [book to attend virtually](#)

You can view the programme and book via the conference flyer. The booking page for all LGA events is www.local.go.uk/events

Legislation

Useful links

[LGA Pension page](#)

[LGPS members' website](#)

[LGPS Advisory Board website](#)

[LGPS Regulations and Guidance website](#)

[LGPS Discretions](#) - lists all the potential discretions available within the LGPS

[The Timeline Regulations for Final Salary Schemes](#)

[The Timeline Regulations for the current scheme](#)

9. Scheme calendar for year commencing 1 April

January	February	March	April
Life Certificates HMRC Event Reporting Payment of Unauthorised Lump Sum and Scheme Sanction Charge to HMRC	Life Certificates	Life Certificates	Apply Pensions Increase Apply Care Revaluation Issue P60's (with April Payslip) Life Certificates Annual employer meeting
May	June	July	August
Active Annual Benefits Statements Life Certificates Deferred Annual Benefits Statements	Active Annual Benefits Statements Active Newsletter Life Certificates	Active Annual Benefits Statements Life Certificates	Active Annual Benefits Statements Life Certificates
September	October	November	December
Life Certificates Pension Savings Statement	Life Certificates Participate in NFI Active Newsletter tPR Scheme Returns Annual employer meeting	tPR Annual Survey Life Certificates Pensioner Newsletter Deferred Newsletter	Life Certificates