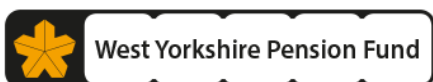


Monthly Report

August 2022

LB Barnet Pension Fund



London Borough
of Hounslow



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Contents

1 Performance summary	3
2 Work in progress.....	5
3 Member web registrations.....	8
4 Administration update.....	8
5 Membership numbers.....	16
6 Management overview.....	16
7 Projects.....	17
8 Regulatory update	20
9 Scheme calendar.....	28

1. Performance summary

Work completed

KPI's for the period - 01.07.22 to 31.07.22							
WORKTYPE	TOTAL CASES JUNE	TOTAL CASES JULY	TARGET DAYS FOR EACH CASE	TARGET MET CASES	MINIUM TARGET PERCENT	TARGET MET PERCENT	AVERAGE TIME TAKEN (Days)
AVC In-house (General)	7	5	20	5	85	100	1.6
Change of Address	52	84	10	80	85	95.24	1.52
Change of Bank Details	7	19	10	18	85	94.74	10.05
Death Grant Nomination Form Received	117	160	20	145	85	90.63	8.36
Death Grant to Set Up	4	4	10	4	85	100	1.25
Death In Retirement	28	17	10	15	85	88.24	4.12
Death In Service	2	2	10	2	85	100	6
Death on Deferred	2	2	10	2	85	100	6
Deferred Benefits Into Payment Actual	24	28	5	28	90	100	1
Deferred Benefits Into Payment Quote	40	58	35	58	85	100	11.41
Deferred Benefits Set Up on Leaving	43	122	20	74	85	60.66	26.01
Divorce Quote	1	2	20	2	85	100	8
Enquiry	0	1	5	1	85	100	1
Estimates for Deferred Benefits into Payment	2	0					
General Payroll Changes	28	19	10	19	85	100	1
Initial Letter Death in Service	2	17	10	17	85	100	1.06
Initial letter Death in Retirement	28	2	10	2	85	100	1
Initial letter Death on Deferred	2	2	10	2	85	100	3.5
Interfund Linking In Actual	7	9	35	8	85	88.89	25.33

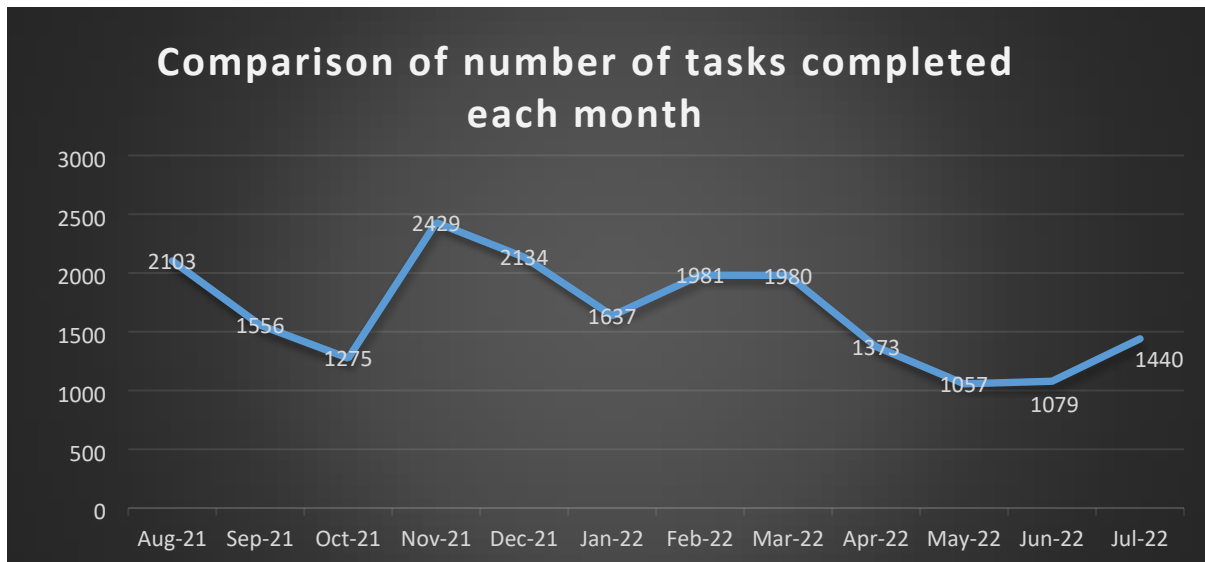
Interfund Linking In Quote	4	24	35	4	85	16.67	62.33
Interfund Out Actual	43	21	35	6	85	28.57	117.81
Interfund Out Quote	43	21	35	15	85	71.43	27.19
Life Certificate Received	1	1	10	1	85	100	10
Monthly Posting	96	176	10	169	95	96.02	3.31
Payment of Spouse & Child Benefits	10	5	5	4	90	80	81.4
Pension Estimate	19	27	10	15	90	55.56	17.81
Phone Call Received	318	454	3	432	95	95.15	1.89
Refund Actual	2	9	10	9	95	100	1
Refund Quote	5	22	35	19	85	86.36	8.23
Retirement Actual	19	22	3	22	90	100	1
Transfer In Actual	2	4	35	4	85	100	2.75
Transfer In Quote	5	2	35	2	85	100	1
Transfer Out Payment	1	0					
Transfer Out Quote	10	24	20	23	85	95.83	9.17
Update Member Details	105	75	20	75	100	100	4.52
Totals	1079 92.91%	1440				89.21%	

Comment – The KPI for Deferred Benefits Set Up On Leaving was not met this month due to staff working on historic cases (which will have already not met the KPI) to reduce outstanding numbers. This area of work has been prioritised due to the Triennial valuation and the number of cases processed this month have been significantly higher than previous months.

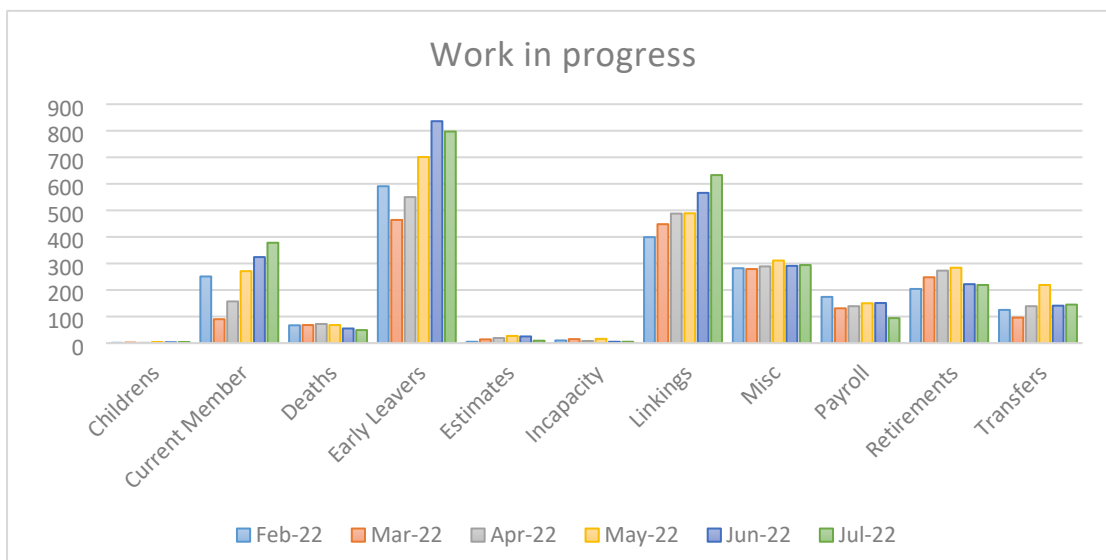
Comment -The KPI's for some of the Interfund areas of work has not been met this month due to historic cases being processed for ABS production. Employers across all funds are currently sending in leaver notifications that have been outstanding in preparation for the Triennial Valuation. This has had an impact on the levels of work and has increased the numbers of linkings and interfunds out.

Comment – The KPI for payment of Spouse & Child Benefits was not met this month due to one case not being completed within the target days. It was a complicated case due to gathering information with regards to an incapacitated child.

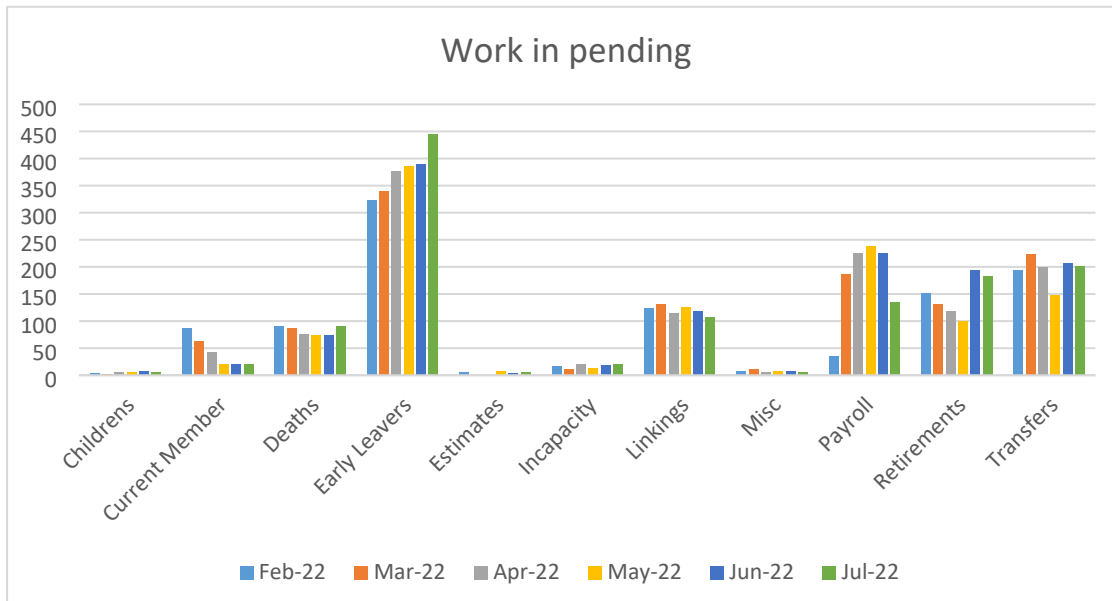
Comment - Comment - The KPI for Pension Estimate has not been met this month due to the high volume of estimates requests being received as members receive their ABS. Estimates received with a date of retirement within 3 months have been treated as a priority and future estimates have been processed but there have not been enough experienced staff to check the number of estimates that have been produced. Additional resources are being put into this area with 2 extra members of staff being trained.



2. Work in progress



	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22
Childrens	1	2	1	4	3	4
Current Member	251	90	157	271	324	378
Deaths	67	68	72	68	55	49
Early Leavers	591	464	550	701	836	797
Estimates	5	14	19	27	25	9
Incapacity	10	15	8	16	5	5
Linkings	399	448	488	489	566	633
Misc	282	279	289	311	291	294
Payroll	174	131	139	150	151	94
Retirements	204	248	273	284	222	219
Transfers	125	96	139	219	141	145



	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22
Childrens	3	2	6	5	7	6
Current Member	86	63	42	21	21	21
Deaths	91	86	75	73	73	91
Early Leavers	323	340	376	385	390	444

Estimates	6	0	0	7	4	5
Incapacity	16	11	21	13	18	20
Linkings	124	132	114	125	119	108
Misc	8	11	6	7	8	6
Payroll	36	186	225	239	225	135
Retirements	151	131	119	99	194	182
Transfers	193	224	200	148	207	202

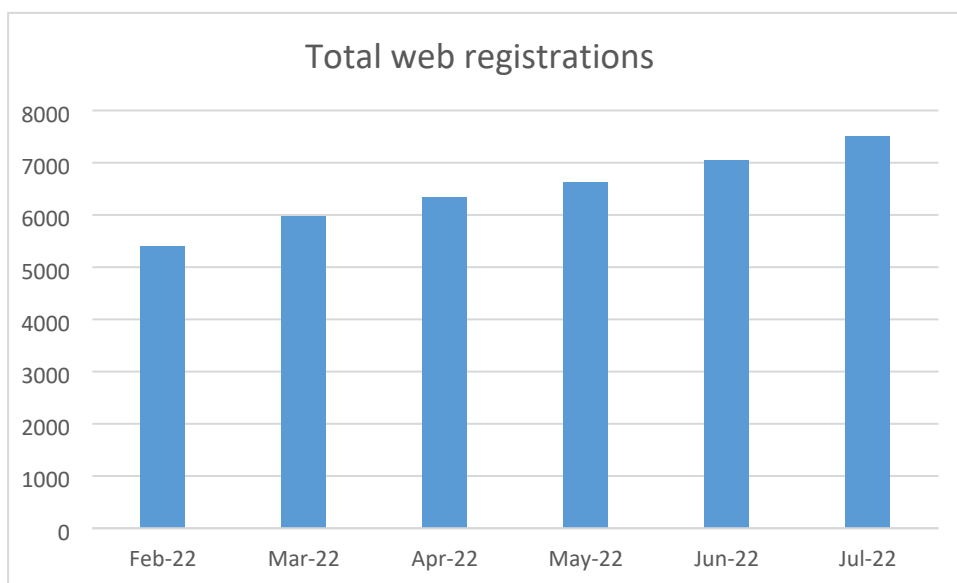
The tables above show processes grouped together and each group consists of a number of processes as shown below.

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	Number
Active	3194
Pensioner	2227
Deferred	2077
Total	7,498



4. Administration update

a) New Academies/Schools

Completed 0
Ongoing 0

New enquiries this month - 0

b) New Admission Bodies

Completed 0
Ongoing 6

New enquiries this month – 0

Ongoing

Name	Start date	Current position	Last action taken	Date completed
Innovate (Blessed Dominic)	01/09/2019	<p>Records to be updated from monthly contribution return to be able to provide data submission to Hymans. Info provided to WYPF on contract – 19/03/2021. Phoned contact at Innovate and sent a spreadsheet to complete – 19/07/2021. Member data provided by Innovate – 20/07/2021. Data submitted to Hymans on 01/11/2021. Assessment completed. Employer record updated to actual. Admission agreement being completed and once this is complete to pass to the Employer Relations Team and Finance as a new employer – 21/02/2022. Mark confirmed at the meeting on 03/03/2022 that the admission is in the process of</p>	<p>Admission agreement with Legal Team for sealing as per Mark Fox – 26/07/2022.</p>	

		being signed and would be ready soon.		
Caterlink (Totteridge Academy)	01/08/2017	Awaiting response from Caterlink with membership data. Data requested from Chris Thomas – 04/08/2021. Member data provided by Caterlink – 23/11/2021. Data submitted to Hymans – 06/01/2022.	Hymans require membership as at 31/03/2019. Contribution postings needed for this. Agreed at meeting on 03/03/2022 to e-mail Mark to confirm requirements. E-mailed Mark 14/03/2022 to confirm that we need to complete monthly contribution postings to 31/03/2019. Mark chased this up with Caterlink – 16/06/2022.	
Signature Education	01/04/2021	Admissions required in respect of contracts with 5 Barnet Schools. Further employer records have now been set up for 3 further schools. For the three original academies that transferred staff to Signature – they are still with Mark Fox for concluding admission agreements and then we can conclude our	Meeting held with Mark Fox and Signature – 28/07/2022. Further email followed this meeting. The company has gone out of business and the admissions therefore appear unlikely to proceed.	

		processes on these.		
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 as per Mark Fox – 26/07/2022.	
Hire-A-Pitch (Whitefield School)	01/10/2021	Member details confirmed – 02/12/2021. Employee was not in the scheme. Contacted contractor to ask about their intentions as the member who transferred was not in the scheme – 10/02/2022. Copy of the e-mail sent to Mark 03/03/2022 for him to consider the next action.	Still waiting to hear if this is an admission as per Mark Fox – 26/07/2022.	
Alliance in Partnership (Osidge)	01/08/2018	Pay details received and further data submitted to Hymans – 16/02/2022. 2019 valuation position issued by Hymans. Mark F will issue the admission agreement – 28/04/2022. Member details forwarded to Mark F for inclusion in the admission	Admission agreement with the employer – confirmed by Mark Fox – 12/07/2022.	

		agreement – 31/05/2022.		
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c) Employers ceasing participation

Completed 2
Ongoing 7

Name	Date ceased	Current position	Last action taken	Date completed
Ashlyns	31/07/2020	Delayed by one final outstanding leaver. A meeting was held between Jo Gaffney, Mark Fox and myself to agree a way forward with Mark providing the relevant leaver information. The record was then set to deferred status so that we could run of the cessation data.	Cessation data submitted to Hymans – 13/07/2022.	
Caterlink (Totteridge)	23/03/2020	Contributions not received from employer. Member data has now been received from Caterlink. Still dealing with opening position at this point.	Response received from Caterlink. Mark Fox replied with bank details for payment of contributions – 26/07/2022.	
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.	
Caterlink (QE Girls School)	31/08/2021	Contributions not received. Mark	Chased up Service Centre	

		<p>Fox chasing up employer – 27/10/2021. We have also requested 3 outstanding leaver notifications – 23/11/2021. Outstanding leaver with Service Centre who are requesting outstanding postings from the employer. Final leavers being worked on – 14/03/2022. Both leavers have calculations in progress – 31/05/2022.</p>	<p>asking for leavers to be prioritised – 22/06/2022</p>	
Hartwig	09/07/2021	<p>Last query from Hymans responded to – 29/03/2022. Hymans still require data from WYPF for one outstanding leaver – 28/04/2022. Outstanding data submitted to Hymans – 04/05/2022.</p>	<p>Confirmed as concluded by Mark Fox – 12/07/2022.</p>	12/07/2022
Churchill Catering (Queenswell School)	30/11/2021	<p>Cessation data submitted to Hymans – 28/04/2022. Queries from Hymans responded to - 16/05/2022.</p>	<p>Confirmed as concluded by Mark Fox – 12/07/2022.</p>	12/07/2022

Atlas Cleaning (Claremont)	31/03/2022	End of contract. Cessation process set up – 04/04/2022. Queried with employer what happened to the members, are they leavers or did they transfer to a new employer – 28/04/2022. Queried with Claremont Primary – 03/05/2022. Chased up – 22/06/2022.	Leaver notifications requested – 12/07/2022.	
Fremantle Trust (2)	30/06/2019		Last email from Hymans saying they thought the cessation valuation had been concluded. Mark Fox to confirm – 18/07/2022.	
City and County Healthcare Group	08/06/2022	Last member left.	Retirement notification requested by Service Centre – 26/07/2022.	

d) Other employer work

Name	Description	Current position	Last action taken	Date completed
Bulk transfer to Harrow Council.	Bulk transfer dating back to 2015 and transfer value has still not been agreed by the actuaries.		Bulk transfer to be agreed by actuaries. To keep under review at monthly meetings.	

e) Internal Dispute Resolution Procedure (IDRP)

Stage 1

Completed 0

Ongoing 1

Date of appeal	Reason for appeal	Current position /outcome	Last action taken	Decision due	Date decision letter sent
15/06/2022	Appeal against a period of secondment being recorded as a separate scheme employer resulting in a deferred pension.	Referred to employer – 04/07/2022.		15/08/2022	

Stage 2

Completed 0

Ongoing 0

f) TPAS/Pensions Ombudsman

None

g) Compensation cases – July to September 2022

None

h) Member issues

- Member retired in 2019 and the reason for retirement was given as redundancy. The retirement was processed by WYPF in January 2022 as this had not been done by the previous pension administrator in 2019. An e-mail was then received in May 22 confirming that the reason for retirement was age retirement not redundancy. The member's benefits were re-calculated and a letter was sent to the member explaining the recalculation and also that her pension and lump sum had been overpaid. A letter was also sent to the employer explaining that as they had changed the reason for retirement the benefits had been overpaid and an invoice would be sent for the overpayment.
- Member joined and told us they had previous LGPS membership but no interfund process was started. It was picked up when a process was started

on another record we have for the member which she had previously left. The interfund process was started on her new record and the member of staff who had dealt with the case and is currently in training was told how to deal with these cases going forward.

- A refund quote was sent to the member but we then discovered she had gone to a new LGPS employer. An e-mail was sent to the member to apologise for sending details of the refund and that it was sent in error as she had new LGPS membership. Member e-mailed back and was happy with the explanation.

i) Employer issues

None

5. Membership numbers

Membership status	ACTIVES	DEFS	PENS	BENS	PRESERVED REFUND	LVRS OPTIONS PENDING
Numbers	9379	9784	7841	1009	1204	907
Change from last month (+ / -)	+10	+76	+40	-1	0	-5

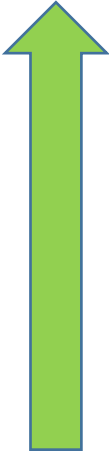
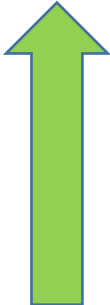
6. Management overview

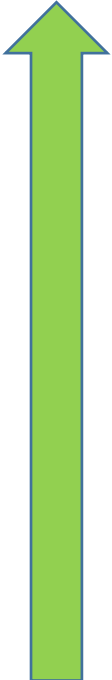
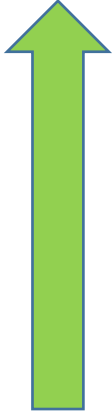
a) Staffing update

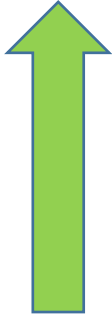

Finance – There are currently no vacant posts in the Finance Team.

Service Centre – The recent recruitment exercise for the Pension Officer posts resulted in 3 applicants being offered a post and they will be starting at the beginning of September. There continues to be ongoing Pension Officer recruitment as there are 15 vacant posts and these are currently being advertised. The next exercise to recruit to these posts will start in the next couple of weeks and a number of applications have already been received.

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.	There are still a large number of employers that have not provided data and we believe that this is possibly because they don't need to provide any additional data. Agreed that we are now at the point to start giving employers a deadline - suggested date was 30th September to hopefully help employers and WYPF get beyond the peak leave period.	Civica's final product specification for McCloud is due the 1 st week in September. Once we have received the final product specification we will communicate further.		Regulations to be introduced from 1 st October 2023 as per current proposal.
Phase 3 (Monthly postings)	Move all the functionality onto to the front end website to enable Employers to process the data.	This is starting to progress as fixes are put in place as the internal testing continues in the Finance Team with a view to ask some employers to also test it.	Final development work has been scheduled in and internal testing has highlighted a couple of further amendments/developments are needed. Frontend penetration testing is being done in the next few weeks to check Cyber security and availability.		2022/2023

<p>Pensions Dashboard</p>	<p>Will enable individuals to access their pension information online, securely and all in one place.</p>	<p>Both Civica and ITM can offer a dashboard service and the Head of Projects, Communications & IT is issuing an invitation to tender mid-August for the service. Civica have progressed well on their development and are projecting to have their offer ready Autumn this year. The next meeting with TPR is the end of July. We are expecting DWP's response to the 31st Jan Dashboard Consultation on 23rd July pre summer recess. We are not expecting any significant changes.</p>	<p>DWP made their response pre-summer recess and clarified that AVCs are included within the Regulations for Pensions Dashboard. The staging date has been delayed from April 2024 to September 2024 to allow for McCloud/Sargent developments to be included in the staging date data requirements. At the meeting in July with TPR they were interested in our procurement process and the progress Civica have made around Pensions Dashboard. There was also a discussion on data quality and data accuracy. The next meeting is planned for September.</p>		<p>2022/2023</p>
<p>Key Performance Indicators (KPIs)</p>	<p>The KPI indicators have been developed in order to provide funds with the ability to self-assess against best practice benchmarks.</p>	<p>The new KPI reports have now been completed by Hafiz in IT. These will be tested internally before they replace the current KPI reports. The newly developed end to end KPI's will be tested</p>	<p>We continue to have regular internal meetings to discuss the new KPIs and ensure going forward that they are reporting correctly. The Member Service Managers are currently looking at each of the KPIs within their</p>		<p>Autumn 2022</p>

		thoroughly throughout the summer, analysed, checked for reliability and for accuracy. It is our intention to use the new KPI measures in the monthly report with effect from the autumn. A letter has been sent to all Shared Service Partners to confirm we have formally started the review.	area and will feed back at the regular meetings.		
Data Improvement Plan	Data falls into 2 categories – Common & Scheme Specific (also known as Conditional)	IT have agreed the quote from the supplier for intelligent character recognition, this is for a month's technical scoping to get the best configuration for us. This will include some support from Civica and we are waiting for dates from Civica to schedule this in.	Civica have agreed to send us a proposal for access to the image server and routes to make this development happen. The next step is for WYPF to write a detailed brief for Civica of our requirements and Civica will respond to those with a proposal of how this can happen. The proposal should be received by the end of August.		As per Data Improvement Plan.
Website	WYPF's website has not been redesigned since the introduction of the CARE scheme in	To ensure that we fully meet our customers' needs and wants we have undergone a programme of surveying users which will shortly	The survey has now closed. Total responses 7309 (around 11%). Results and analysis being put into a report by		New website live by Q4 2022/23

	2014. Change is needed to improve: Member journeys, brand identity, diversity of media and accessibility	be complimented by a series of members' labs. We've also researched the market looking at both LGPS sites and wider financial institutions to understand how they have approached web design.	TLF for a presentation back to the Communications Team on 5/8/22.		
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8. Regulatory update

[LGPC Bulletin 227 \(lgpslibrary.org\)](https://www.lgpsi.org.uk/bulletin-227) has now been published, please take a few minutes to read the bulletins.

LGPS England & Wales

Government confirms academy guarantee will continue After a reassessment, the Government confirmed on 21 July 2022 in [a written ministerial statement](#)? that it will continue to provide the academy guarantee. The annual ceiling will also increase to £20 million.

In 2013, the Government introduced the academy guarantee. The guarantee provides that, in the event of an academy closing, any outstanding liabilities will not revert to the LGPS fund. We covered this in [Bulletin 105](#).

Although there is no end date to the guarantee, the Government is committed to regularly reassessing it to determine whether it remains affordable and is fully recognised by administering authorities.

The Scheme Advisory Board in England and Wales has also published [a news article on this](#).

LGPS minister changes

On 6 July 2022, Kemi Badenoch MP resigned from the Government. Kemi Badenoch was Minister of State at the Department for Levelling Up, Housing and Communities. As part of this office, she was responsible for the LGPS.

The Government has recently confirmed that Paul Scully MP has taken over ministerial responsibility for the LGPS.

The Scheme Advisory Board in England and Wales has published [a news article on the changes](#)

HMRC

Newsletter 141

On 21 July 2022, HMRC published pension schemes newsletter 141. The newsletter includes articles:

- covering the technical consultation on resolving the low earners tax relief anomaly (see below article covering the consultation)
- clarifying how to migrate schemes from the Pension schemes online service to the Managing pension schemes service
- reminding schemes that they cannot compile and submit new Accounting for Tax returns for any quarter from 1 April 2020 onwards on the Pension schemes online service
- reminding schemes who need to submit an Accounting for Tax return for the quarter 1 April 2022 to 30 June 2022 that they will need to have migrated the scheme and submitted the return on the Managing pension schemes service by 14 August 2022 to avoid interest and penalties

Technical consultation on resolving low earners tax relief anomaly

On 20 July 2022, HMRC launched [a technical consultation](#) on draft legislation that aims to resolve the tax relief anomaly. The consultation closes on 14 September 2022.

The proposed changes will be included in the next Finance Bill.

The tax relief anomaly affects pension scheme members who earn less than the personal allowance. Whether the member receives any tax relief on their pension contributions depends on the tax relief method used by their scheme. The scheme will either use the 'net pay arrangements' or the 'relief at source' method.

Under the 'net pay arrangements', pension contributions are deducted before income tax is calculated. This means that tax relief is equal to the member's marginal rate. For members whose income is below the personal allowance, the rate is zero per cent. Under the 'relief at source' method, low earners do receive tax relief on their contributions. The LGPS uses the 'net pay arrangements'.

The legislation proposes placing a duty on HMRC to make top up payments directly to eligible members. Eligible members are members who pay into a scheme that uses the 'net pay arrangements' and whose total taxable income is below the personal allowance. H M R C will identify and notify eligible members and invite them to provide the necessary details for the top up payment to be paid direct to their bank account. The duty will apply for the tax year 2024/25 onwards.

The proposals follow an earlier call for evidence on resolving the anomaly from HM Treasury (HMT). The call for evidence ran between 21 July 2020 and 13 October

2020, which we covered in [Bulletin 200](#). We responded to the consultation in October 2020. H M T responded to the consultation in October 2021. You can access the consultation documents and our response on the:

- [non-scheme consultations](#) page of www.lgpsregs.org

GAD

Cost cap results published

On 29 June 2022, the Government Actuary's Department published the results of the first cost cap valuation for LGPS (England and Wales) and LGPS (Scotland).

The cost cap was introduced by the Public Service Pensions Act 2013. The Act requires the setting of an employer cost cap rate against which changes in the cost are to be measured. If the cost changes and falls outside a two per cent corridor above / below the rate, action must be taken to bring the cost back to the rate.

The results of the first valuations show that the cost has remained within the two per cent corridor for both schemes. This means no changes to benefits or member contributions are needed.

The employer cost cap rate for LGPS (England and Wales) is 14.6 per cent. [The results for the valuation as at 31 March 2016](#) show that the cost is 1.2 per cent below the cost cap rate.

The employer cost cap rate for LGPS (Scotland) is 15.2 per cent. [The results for the valuation as at 31 March 2017](#) show that the cost is 0.2 per cent above the cost cap rate.

TPO

TPO McCloud factsheet published

On 20 July 2022, TPO published [a factsheet on McCloud](#) a factsheet on McCloud.

The factsheet sets out TPO's views on what affected members and schemes can do now and TPO's present approach to dealing with McCloud complaints.

TPO's general starting position is that it would not investigate McCloud complaints. This is because it acknowledges that the Government is taking steps to address the discrimination with retrospective effect. TPO will, however, carefully look at the facts of each case before deciding whether to investigate. The factsheet sets out examples where TPO may decide to investigate a McCloud complaint now.

TPR

Pensions dashboards

Blog published from Moneyhub

On 7 July 2022, the Pensions Dashboards Programme (PDP) published a blog from Dave Tonge, Chief Technology Officer at Moneyhub.

Moneyhub has been helping the PDP develop pensions dashboards.

In the blog, Dave reflects on a key lesson from the alpha build phase, how multiple dashboards will help consumers and the importance of the upcoming beta testing phase.

Dashboard Accuracy Data Guidance

On 4 July 2022, the Pensions Administration Standards Association published the Dashboard Accuracy Data Guidance.

The guidance highlights the importance of regularly testing data for accuracy. This is particularly important for data that pension schemes will use when matching requests from the dashboards. The guidance provides information on how schemes could test their data and what data sources they could use.

DWP responds to consultation on the draft pensions dashboards regulations

On 14 July 2022, the Department for Work and Pensions (DWP) [responded to the consultation on the draft Pensions Dashboards Regulations](#).

DWP has also published a [summary of the key policies](#). The summary reflects the response to the consultation.

DWP consulted on the regulations between 31 January 2022 and 13 March 2022, which we covered in [Bulletin 220](#). We responded to the consultation in March 2022.

The key areas of the response that affect LGPS administering authorities are set out below. DWP will amend the draft regulations ('the Regulations') to reflect the response. We expect DWP to lay the Regulations before Parliament in autumn.

Staging Deadline

The staging deadline for the LGPS and all other public service pension schemes will be deferred from 30 April 2024 to 30 September 2024.

Schemes will be expected to meet the required standards (connection, security and technical) by 30 September 2024. They must also, by that date, be able to respond to find requests, complete matching and provide administrative and signpost data on request.

Administering authorities will need to be able to provide value data (accrued and projected values) by 1 April 2025. Though they can provide this earlier if they wish.

You can access the consultation documents on the:

- [non-scheme consultations](#) page of www.lgpsregs.org

LGA response to further consultation on pensions dashboards

On 19 July 2022, we responded to the further consultation on pensions dashboards. DWP launched the further consultation on 28 June 2022. We covered this in [Bulletin 226](#). The consultation included proposals on the 'Dashboard Available Point' (DAP).

In our response, we call for the Government to:

- commission market research on how many people are likely to connect to dashboards when they go live
- consider phasing publicising the DAP, possibly by age or region
- consider providing easements during the initial period after the DAP.

Our response can be found on the:

- [non-scheme consultations](#) page of www.lgpsregs.org

PDP launches consultation and call for input on standards and guidance

On 19 July 2022, the Pensions Dashboards Programme (PDP) launched a consultation on dashboard standards and guidance, and a call for input on the design standards. Both the consultation and the call for input will close on 30 August 2022.

Standards and guidance

The standards detail how pension schemes and dashboard providers operationally, technically or in practice must meet their dashboard duties. The following six standards are published for consultation:

- data standards
- operational standards
- reporting standards
- security standards
- service standards
- technical standards (this comprises of the technical standards, the API standards and technical overview guidance).

The guidance provides further requirements that pension schemes must have regard to when complying with their dashboard duties. The following three sets of statutory guidance have been published for consultation:

- connection guidance
- data usage guide
- early connection guidance.

Other news and updates

2022 National Knowledge Assessment

Following [the 2020 LGPS National Knowledge Assessment](#), Hymans Robertson will run their benchmark knowledge and skills assessment again this September. The assessment is aimed at pension Committees and local pension boards.

Administering authorities will be able to gain an understanding of the knowledge levels of both groups and how that compares with their peers. Questions will be split between technical, decision making and roles and responsibility, providing further information to administering authorities to aid the development of training plans.

You can find more information about the assessment, including a link to register interest, on [the relevant page of Hymans Robertson's website](#).

Commenting on the 2022 assessment Councillor Roger Phillips, SAB (England and Wales) Chair, said:

“We very much welcome the follow up assessment which will enable the Board, pension committees, local pension boards and other scheme stakeholders to assess and compare the levels of knowledge across key sectors since 2020.”

Cost cap control judicial review given permission to be heard

On 4 July 2022, the Fire Brigades Union and the British Medical Association were given permission to judicially review the UK Government’s decision to include McCloud remedy costs in the 2016 cost control valuations. The cases will be heard together.

Though the case will look at the firefighters’ and NHS pension schemes, the outcome may have an impact on the LGS. This is because the first cost control valuations in the LGPS also included the McCloud remedy costs. See earlier article for the results of the first LGPS cost control valuation.

No date has been set for when the case will be heard.

McCloud update from DLUHC

On 27 July 2022, Steven Moseley sent the following update to administering authorities in England and Wales and software suppliers on behalf of the Department for Levelling Up, Housing and Communities (DLUHC).

Earlier this year, the Public Service Pensions and Judicial Offices Act 2022 (“the 2022 Act”) received Royal Assent. The 2022 Act provides powers for the Government to rectify the McCloud age discrimination across all affected public service pension schemes. In DLUHC, work continues on the steps to rectify the

discrimination as it affects the L G P S in England and Wales. Later this year, we intend to publish the Government's response to [our 2020 consultation](#), in which we'll set out our decisions on the matters covered in that consultation. After the publication of the Government 20 response, the Scheme Advisory Board will resume their McCloud implementation groups (including representatives of different LGPS stakeholders), and the Department will attend those meetings.

Alongside the Government response, we intend to publish an updated version of the draft regulations implementing the McCloud remedy. The updated draft regulations will reflect the new powers in [Chapter 3 of Part 1](#) the 2022 Act governing the statutory underpin, as well as technical feedback we received at the 2020 consultation and any changes in policy. To ensure the updated draft regulations are accurate in light of the changes made, they will be subject to a further period of consultation early in 2023. At that time, we will also consult on other aspects of the McCloud remedy which did not feature in our original consultation (for example, compensation and rates of interest). The regulations will be made later in 2023 and will come into force on 1 October 2023. We intend to issue statutory guidance on the implementation of McCloud in 2023 following a period of consultation.

This approach will ensure that the regulations, when made, will reflect all aspects of the remedy and have been appropriately scrutinised. We would encourage LGPS administrators to begin taking steps towards the implementation of McCloud remedy following the publication of the Government response, and will shortly be holding a meeting with software suppliers to discuss the implementation of the McCloud remedy to this timetable.

Training

Employer role training There are still places available on the employer role training we will run in September online. Use the links below to see more information about the training and make a booking. Please let your employers know about the training.

[Employer role training - 13 September 2022 Online](#)

[Employer role training - 20 September 2022 Online](#)

Fundamentals 2022

Our Fundamentals training programme for this year is proving very popular.

The training will be run face to face in two locations, London and Birmingham and we will also be running a separate online session.

Fundamentals is a three-day training course aimed at elected members and others who attend pension committees/panels and local pension boards. Attending all three days will assist delegates in meeting the relevant requirements for knowledge, skills and understanding either required in statute or encouraged by relevant guidance. Each day has a different theme and will include sessions delivered by experts in their field. The event also provides delegates with valuable networking opportunities.

Early booking is recommended as places are limited. We are unable to take manual bookings.

Each event below has a link to take you directly to the booking page of that session.

[Fundamentals Day 1 – 18 October 2022 online](#) [Fundamentals Day 1 – 20 October 2022 Westminster](#)

[Fundamentals Day 1 – 27 October 2022 Birmingham](#)

[Fundamentals Day 2 – 10 November 2022 Westminster](#)

[Fundamentals Day 2 – 16 November 2022 Birmingham](#) [Fundamentals](#)

[Day 2 – 22 November 2022 online](#) [Fundamentals](#)

[Day 3 – 6 December 2022 Westminster](#) [Fundamentals](#)

[Day 3 – 14 December 2022 Birmingham](#) [Fundamentals](#)

[Day 3 – 20 December 2022 online](#)

The booking page for all LGA events is: www.local.gov.uk/events.

Legislation

Statutory Instruments

[The Public Service Pensions \(Employer Cost Cap and Specified Restricted Scheme\) Regulations 2022](#) [SI 2022/787]

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