

Monthly Report

February 2023

LB Barnet Pension Fund

Prepared by:

Lisa Darvill

Client Relationship Manager

Tel: 01274 432540

Mobile: 07582 100320

Email: lisa.darvill@wypf.org.uk

West Yorkshire Pension Fund

Aldermanbury House

4 Godwin Street

Bradford

BD1 2ST

www.wypf.org.uk

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1. Performance summary

Work completed

KPI's for the period - 01.01.23 to 31.01.23							
WORKTYPE	TOTAL CASES DECEMBER	TOTAL CASES JANUARY	TARGET DAYS FOR EACH CASE	TARGET MET CASES	MINIUM TARGET PERCENT	TARGET MET PERCENT	AVERAGE TIME TAKEN (Days)
AVC In-house (General)	5	8	20	8	85	100	1.75
Change of Address	40	42	20	42	85	100	1.98
Change of Bank Details	6	19	20	19	85	100	1.89
Death Grant to Set Up	1	5	10	5	85	100	5.2
Death In Retirement	21	29	10	25	85	86.21	9.03
Death In Service	0	1	10	1	85	100	9
Death on Deferred	0	1	10	1	85	100	10
Deferred Benefits Into Payment Actual	34	44	5	40	90	90.91	4
Deferred Benefits Into Payment Quote	39	58	35	27	85	46.55	40.79
Deferred Benefits Set Up on Leaving	87	78	20	36	85	46.15	73.74
Dependant Pension To Set Up	4	14	5	13	90	92.86	4.43
Divorce Quote	2	6	40	6	85	100	5.17
Estimates for Deferred Benefits into Payment	0	2	10	2	90	100	3
General Payroll Changes	10	15	20	15	85	100	1.27
Initial letter Death in Retirement	21	29	10	28	85	96.55	1.34
Initial Letter Death in Service	0	1	10	1	85	100	1
Initial letter Death on Deferred	0	1	10	1	85	100	1
Interfund Linking In Actual	0	7	35	3	85	42.86	130.14
Interfund Linking In Quote	13	26	35	21	85	80.77	85.54

Interfund Out Actual	63	38	35	34	85	89.47	16.95
Interfund Out Quote	40	39	35	38	85	97.44	20.9
Life Certificate received	22	22	10	22	85	100	9.27
Monthly Posting	101	188	10	179	95	95.21	2.28
Pension Estimate	21	38	10	30	90	78.95	7.84
Phone Call Received	168	212	3	206	95	97.17	1.25
Refund Actual	17	33	10	33	90	100	3.67
Refund Quote	37	98	35	52	85	53.06	55.74
Retirement Actual	14	23	10	21	90	91.3	4.52
Transfer In Actual	0	3	35	3	85	100	30
Transfer In Quote	0	7	35	7	85	100	6.86
Transfer Out Payment	0	1	35	1	85	100	8
Transfer Out Quote	18	16	35	10	85	62.5	20.81
Update Member Details	351	177	20	174	100	98.31	4.54
Totals	1135 89.53%	1281				89.28%	

Comment - The KPI for Deferred Benefits Into Payment Quote was not met this month due to a significant increase in the requests for quotes from members. The requests are being dealt with by the Team in date order of retirement.

Comment - The KPI for Deferred Benefits Set Up on Leaving was not met this month due to older cases being completed as well as new BAU cases. The Team continue to work on the older cases to reduce the numbers.

Comment - The KPI for Interfund Linking In Actual was not met this month due to the payment being received from the former fund but the record has recently been updated. Training for new members of staff on this area of work started in January and this will help to reduce the outstanding number of cases.

Comment – The KPI for Interfund Linking In Quote was not met this month due to 5 cases which were processed late due to resources within the Team. New staff are currently being trained in this area of work and these have been prioritised from January to reduce the outstanding number of cases.

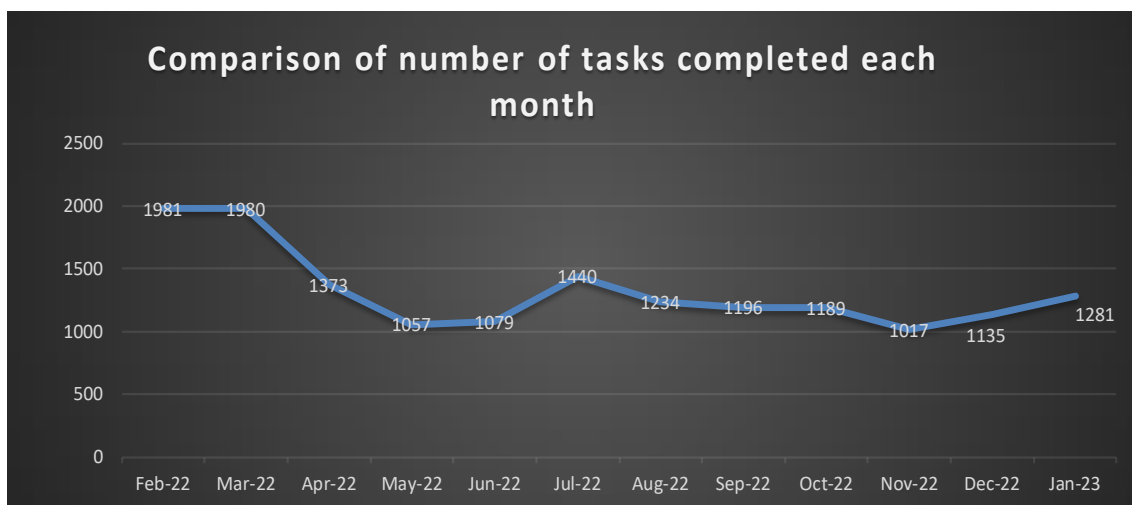
Comment – The KPI for Pension Estimate was not met this month due to a significant increase in requests for estimates from members. The requests are being dealt with by the

Team in date order of the potential retirement date. The estimates that were processed outside the target days all have a retirement date which is more than 6 months away.

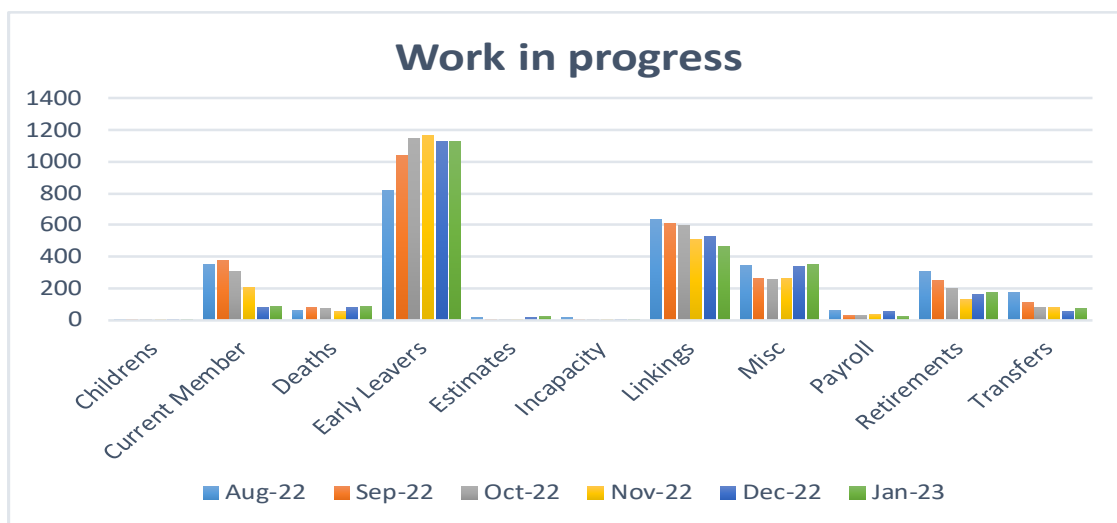
Comment – The KPI for Refund Quote was not met this month due to the Team dealing with older cases which were put on hold in the early part of the year as the Team focussed on processing deferred benefits for the valuation extracts.

Comment – The KPI for Transfer Out Quote was not met this month due to a number of cases which were processed just outside the target days. The Team have had an increase in requests for transfer out quotes but these have been completed within the statutory time limits.

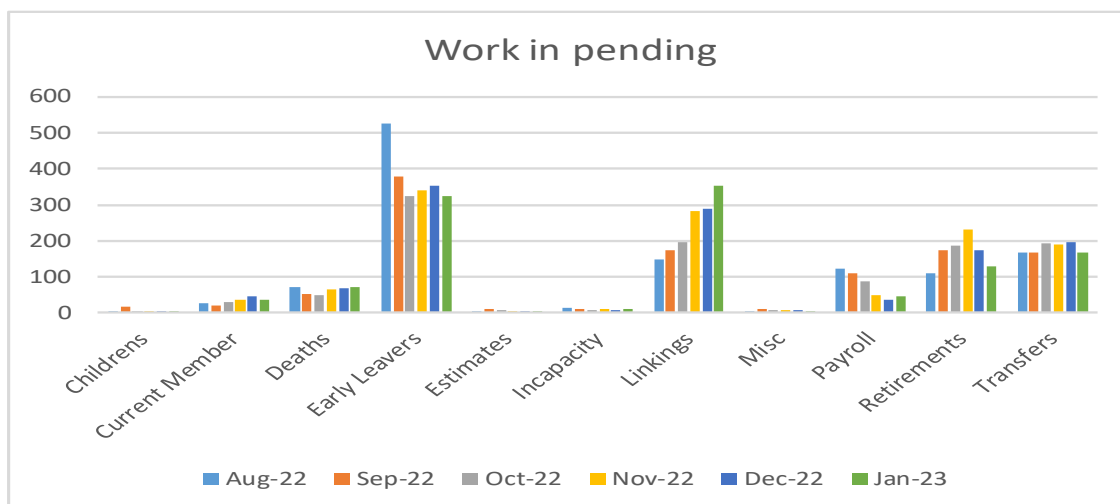
Comment - The KPI for Update Member Details was not met this month due to a number of hour changes that have previously not been processed as other work had taken priority.



2. Work in progress



	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23
Childrens	5	3	5	2	2	3
Current Member	354	374	306	208	81	89
Deaths	61	79	71	54	75	88
Early Leavers	825	1040	1141	1170	1129	1127
Estimates	9	3	7	5	9	18
Incapacity	10	5	5	7	8	2
Linkings	638	613	591	506	529	464
Misc	343	267	256	261	334	349
Payroll	57	29	27	39	52	24
Retirements	302	243	195	125	155	178
Transfers	173	108	80	77	51	73



	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23
Childrens	5	16	6	3	3	2
Current Member	26	22	30	35	47	36
Deaths	71	54	50	64	67	73
Early Leavers	526	379	325	340	352	323
Estimates	6	10	7	6	6	6
Incapacity	14	10	9	10	9	11
Linkings	147	175	196	281	289	354

Misc	3	10	8	8	8	3
Payroll	122	109	87	49	38	45
Retirements	110	173	187	230	174	130
Transfers	167	169	193	189	195	168

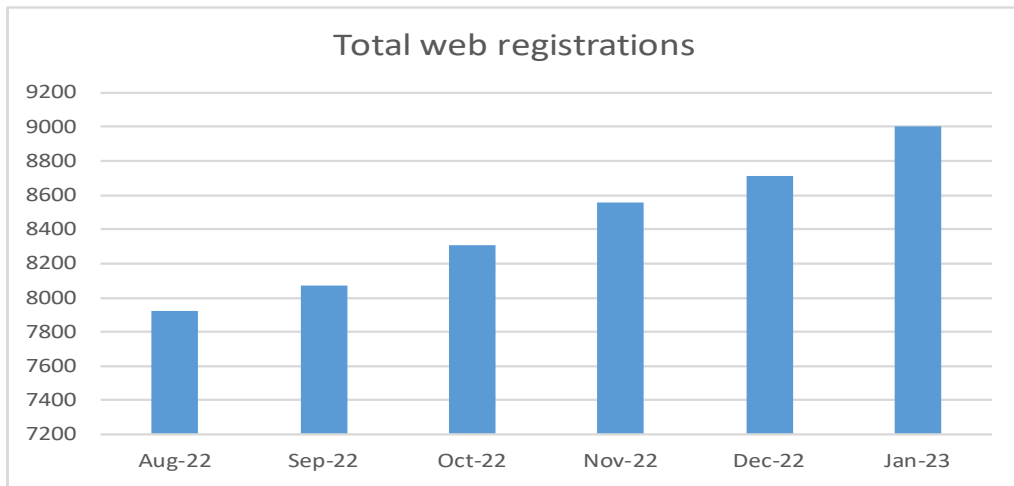
The tables above show processes grouped together and each group consists of a number of processes as shown below.

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	3,516	3,569
Pensioner	2,815	3,027
Deferred	2,382	2,407
Total number	8,713	9,003



4. Administration update

a) New Academies/Schools

Completed 0

Ongoing 0

New enquiries this month - 0

b) New Admission Bodies

Completed 1

Ongoing 9

New enquiries this month – 1

Name	Start date	Current position	Date completed
Chequer Cleaning Services	01/12/2022	New employer record set up on UPM. Employer contacts set up.	

Ongoing

Name	Start date	Current position	Last action taken	Date completed
Innovate (Blessed Dominic)	01/09/2019	Records to be updated from monthly contribution return to be able to provide data submission to Hymans. Info provided to WYPF on	Contact forms issued to the employer – 23/11/2022. Contacts set up – 09/12/2022.	

		<p>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. Sealing of admission agreement still outstanding as per Mark at meeting – 27/10/2022.</p>		
Innovate (St James)	01/08/2019	<p>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.</p>	<p>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.</p>	
Caterlink (Totteridge Academy)	01/08/2017	<p>Awaiting response from Caterlink with membership data. Data requested from</p>	<p>Contribution postings now complete. Leaver</p>	

		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. Caterlink confirmed they have submitted contributions. Queried with Finance Team 13/09/2022, chased up 19/10/2022.	notifications requested – 24/01/2023	24/01/2023
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	No change as per December meeting.	

		original academies that transferred staff to Signature – they are still with Mark Fox for concluding admission agreements and then we can conclude our processes on these. 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. Last e-mail from Mark Fox to Signature on 11/08/2022. Mark Fox to chase up again – 05/09/2022. Still outstanding as per Mark at meeting – 27/10/2022. It has been referred to the lawyers.		
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. Mark Fox has	New employer contacts set up on employer record – 12/01/2023.	

		<p>chased this up again – 05/09/2022. Mark confirmed the admission agreement is with lawyers to seal – 13/09/2022. Still outstanding as per Mark at meeting – 27/10/2022. Agreed with Mark Fox at December meeting to proceed with new employer process. Mark provided a contact at Tenon – 21/12/2022.</p>		
<p>Alliance in Partnership (Osidge)</p>	<p>01/08/2018</p>	<p>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 agreement – 31/05/2022. Admission agreement with the employer – confirmed by Mark Fox – 12/07/2022. Mark Fox to chase up again – 05/09/2022. With lawyers to seal – 13/09/2022. Mark confirmed he is chasing this</p>	<p>Data submitted to Hymans – 18/01/2023.</p>	

		and we will need to submit further data to Hymans for the 2022 valuation once completed – 26/09/2022. Still outstanding as per Mark at meeting – 27/10/2022. Now a cessation as at 31/07/2022. Agreed at December meeting to proceed with new employer process. New employer guide sent – 07/12/2022.		
Enigma	01/09/2022	Admission agreement completed. Single member transferring from OCS. Enigma will continue to pay the same rate as OCS and there is no Bond requirement. Will update Hymans when we have this in place – as agreed with Mark Fox at meeting – 13/09/2022. Member record updated and data submitted to Hymans – 16/11/2022. Data to be resubmitted – pay figure requested from employer – 23/11/2022.	Data submitted to Hymans – 06/12/2022.	

Nourish Catering (Osidge)	01/08/2022	To be set up as an active employer. Member data provided by Nourish – 02/11/2022. New employer information issued and data submitted to Hymans – 24/11/2022. Query from Hymans responded to – 06/12/2022.	Hymans confirmed queries resolved and confirmed information on interim contribution rate available for Mark. Check at next meeting with Barnet if this is concluded – 09/01/2023.	
Capita Shared Services Ltd	01/11/2022	Set up new employer and submit data.	Data submitted to Hymans – 20/12/2022.	

c) Employers ceasing participation

Completed 0
Ongoing 8

Name	Date ceased	Current position	Last action taken	Date completed
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. Caterlink	Contribution postings now complete. Leaver notifications requested – 24/01/2023.	

		confirmed they have submitted contributions. Queried with Finance Team – 13/09/2022 and chased up – 19/10/2022. New employer process set up 06/12/2022. Contact forms sent – 07/12/2022.		
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. 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. No change to this situation – 26/10/2022. Agreed at December 2022 meeting to refer to Service Centre.	Referred to Service Centre – 05/01/2023.	
Atlas Cleaning (Claremont)	31/03/2022	End of contract. Cessation process set up – 04/04/2022. Queried with employer what	To discuss further at February meeting.	

		<p>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. Chased up – 05/09/2022. Issue raised re additional contributions deducted – 17/10/2022. Chased up – 24/11/2022. Agreed at December meeting to refer back to Service Centre to arrange to refund additional contributions.</p>		
City and County Healthcare Group	08/06/2022	<p>Last member left. Retirement notification requested by Service Centre – 26/07/2022. E-mail from Service Centre asking for final pay which was not included on the leaver notification – 16/08/2022. Pay figure confirmed by employer – 27/09/2022. Retirement quote prepared but not sent but further</p>	<p>E-mail from Service Centre confirming they require further information from the employer for this case – 31/01/2023.</p>	

		query on pay to employer – 05/10/2022. Response received – 03/11/2022. Retirement quote sent to member – 02/12/2022.		
OCS Group UK Ltd Barnet	31/08/2022	One remaining active member TUPE transferred on – 31/08/2022. Asked where has the member transferred to and is he continuing in membership – 07/08/2022.	Now confirmed and member transferred to Enigma – 13/09/2022. Data submitted to Hymans – 14/11/2022.	
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.	E-mail received from Mark Fox concerning the outstanding leavers – 01/02/2023. To be discussed at February meeting.	
Alliance in Partnership (Osidge)	31/07/2022	Admission is still being concluded. With lawyers to seal – 13/09/2022. Mark confirmed he is chasing this	Opening data with Hymans – 18/01/2023.	

		and we will need to submit further data to Hymans for the 2022 valuation once completed – 26/09/2022. Still outstanding as per Mark at meeting – 27/10/2022.		
Optivo	30/11/2022	Member transferred to Chequer Cleaning Services.	Cessation data to be submitted to Hymans.	

d) Other employer work

None

e) Internal Dispute Resolution Procedure (IDRP)

Stage 1

Completed 0
Ongoing 2

Date of appeal	Reason for appeal	Current position /outcome	Last action taken	Decision due	Date decision letter sent
05/10/2022	Appeal against decision not to allow late transfer in.	Referred to scheme employer – 11/10/2022.	Chased up with Mark Fox – 26/01/2023.		
23/01/2023	Appeal against handling of pension including late payment of AVC.	Acknowledged – 23/01/2023.	Report requested from Service Centre – 26/01/2023.		

Stage 2

Completed 0

Ongoing 1

Date of appeal	Reason for appeal	Current position /outcome	Last action taken	Decision due	Date decision letter sent
14/12/2022	Appeal against decision to the award of death grant.	Received by Mark Fox – 14/12/2022.			
31/01/2023	Appeal against ill health decision.	Forwarded to Mark Fox – 01/02/2023.			

f) TPAS/Pensions Ombudsman

None

g) Compensation cases – January to March 2023

None

h) Member issues

- We received a retirement notification with the reason for retirement as redundancy but it should have been age and the member's benefits have been overpaid. The pension benefits have been recalculated and a letter has been sent to the member to explain the reason for the overpayment and that the employer will be in contact soon with regards to the overpayment.
- We received a leaver notification with the reason for leaving as redundancy. As the member was over age 55 at the date of leaving they were entitled to immediate payment of unreduced pension benefits. The strain cost for the early retirement was sent to the employer and on receipt of the invoice the reason for leaving was changed to age. The pension benefits have been recalculated and a letter has been sent to the member to explain the reason for the overpayment and that the employer will be in contact soon with regards the overpayment.
- Member's record was on preserved refund status but was given the option to link previous membership. The record was put back to active status so the linking could be completed and once this was done the record was put back to preserved refund status but the member was now entitled to deferred benefits after linking previous membership. This has now been referred to Team Early Leavers for them to calculate the deferred benefits.

i) Employer issues

None

5. Membership numbers

Membership status	ACTIVES	DEFS	PENS	BENS	PRESERVED REFUND	LVRS OPTIONS PENDING
Numbers	9747	9621	8146	1011	1331	644
Change from last month (+ / -)	-27	-12	+48	+1	+49	-66

6. Management overview

a) Staffing update


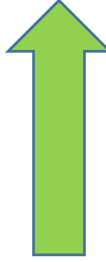
Finance – There are currently no vacancies in the Finance Team.


Service Centre – There are currently 3 Senior Pension Officer vacancies across the service centre and these will be advertised shortly.

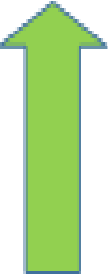

Employer Relations Team – There is one vacancy in the Employer Relations Team for a Pension Fund Representative and they are looking to recruit to this post over the next few months.


Technical Team - There are currently no vacancies in the Technical Team.

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.	Civica have issued a calculation upgrade but this has been rejected due to 3 critical errors. Civica are now fixing these and it will be re-issued in February. Civica are liaising with all clients regarding the timing of this release as it coincides with the statutory updates, PI and prep ABS runs.	Civica have now provided us with a detailed timetable for McCloud/Sargeant and we are now in the process of planning this into our work schedule. To help with the additional work these projects will create for the UPM Team, extra posts have been recruited to and offers have been made to two successful candidates.		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.	As work continues in the IT Team on the functionality of Phase 3, the Finance Team are continuing to contact employers to demo the new monthly postings to ensure they are ready to use it once it is rolled out.	Following the most recent Shared Services meeting we have spoken with the Finance Team and they are contacting Shared Service partners to agree a date or dates to demo and discuss MP3.		2023/2024

<p>Pensions Dashboard</p>	<p>Will enable individuals to access their pension information online, securely and all in one place.</p>	<p>Our internal work is progressing as planned with all shared service partner's data being modelled through the data matching guidelines, the results of this will be available approximately 21st January. This work will identify any key areas to improve data quality for operation within pensions dashboard. This data quality work is scheduled to commence in February and is currently on target. The modelling will also start to inform the likely impact in administration of partial matches and potential volumes. As far as possible this work will be automated. An initial review of TPR's 'Dashboard Compliance and Enforcement Policy: consultation document' has been completed. The regime</p>	<p>WYPF were invited to a meeting with TPR and all LG providers. The focus was on data protection and that a Data Protection Impact Assessment (DPIA) needs to be is done. We will be discussing this internally and</p>		<p>2022/2023</p>
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		is a high level principle based operation. We will take soundings towards the end of January from the LGA on the general views going forward and then respond formally to the consultation.			
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.	We are continuing to work with IT and the Service Centre to ensure the KPIs continue to provide the most accurate results.	KPIs continue to be developed as we amend the last of the processes. Discussions have begun internally to improve general identification and reporting on areas such as backlogs, volumes of work etc. and we are working towards producing an action plan.		2022/2023
Data Improvement Plan	Data falls into 2 categories – Common & Scheme Specific (also known as Conditional)	Other areas of data improvement are being considered and this ties in with the work needed for Pensions Dashboard.	The UPM and IT Team have been working together to look at alternate ways at finding ‘missing data’ on member’s records to help improve the data quality. We have recently seen an improvement in the		As per Data Improvement Plan.

			Barnet data quality where the conditional score increased from 79.65% to 85.14%. The work will continue over the next few months and we should see improvement across all Funds.		
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.	The Project Team are meeting monthly going forward to discuss the look of the website and My pension. Live demo of website loaded onto Umbraco and being developed.	Prototype stage moved into phase 2. Working demo expected by end – February 2023. Initial cross-team work on the new portals has commenced.		New website live by Spring/Summer 2023

8. Regulatory update

[LGPC Bulletin 233 \(lgpslibrary.org\)](https://lgpslibrary.org) has now been published, please take a few minutes to read the bulletins.

LGPS England & Wales

SAB Scheme Valuation Report 2022

The Board's Secretariat is currently planning for the Board's 2022 Scheme Valuation Report.

The report is aggregated using data from individual fund valuation reports. It would be a great help if administering authorities send their valuation reports to the Board's Data Analyst, Gareth Brown, as soon as they have a final version. These will be treated confidentially and only shared on the Board's website once published by the administering authority.

Action for administering authorities - Send your valuation report to Gareth Brown when the final version is available. Gareth's email address is gareth.brown@local.gov.uk

2023/24 employee contribution bands

Table 1 sets out the employee contribution bands effective from 1 April 2023. These are calculated by increasing the 2022/23 employee contribution bands by the September 2022 CPI figure of 10.1 per cent and then rounding down the result to the nearest £100.

Table 1: Contribution table England and Wales 2023/24

Band	Actual pensionable pay for an employment	Main section contribution rate for that employment	50/50 section contribution rate for that employment
1	Up to £16,500	5.50%	2.75%
2	£16,501 to £25,900	5.80%	2.90%
3	£25,901 to £42,100	6.50%	3.25%
4	£42,101 to £53,300	6.80%	3.40%
5	£53,301 to £74,700	8.50%	4.25%
6	£74,701 to £105,900	9.90%	4.95%
7	£105,901 to £124,800	10.50%	5.25%
8	£124,801 to £187,200	11.40%	5.70%
9	£187,201 or more	12.50%	6.25%

HMRC

LGA response to consultation on tax rules for McCloud remedy

On 6 January 2023, we responded to HMRC's consultation on the draft Public Services Pension Schemes (Rectification of Unlawful Discrimination) (Tax) Regulations 2023.

HMRC consulted on the regulations from 24 November 2022 to 6 January 2023, which we covered in [Bulletin 231](#).

You can find the consultation documents, including our response, on the:

- Non-scheme consultations page of www.lgpsregs.org

Pensions dashboards

PDP publishes consumer protection video

The Pensions Dashboards Programme (PDP) recently published [an explainer video on consumer protection](#). The video explains what protections will be in place to ensure dashboards are safe and secure.

Please see the [consumer protection page of PDP's website](#) for more information on this topic.

Other news and updates

Unpaid LGPC subscriptions

Our finance team has recently informed us that 35 administering authorities have yet to pay their LGPC subscription fee for 2022/23. The invoices were issued in August 2022. We have been unable to chase for payment up to now due to the installation of a new finance system at the LGA. If you have any queries about this please email elaine.english@local.gov.uk

Action for administering authorities - Please check the outstanding payment list to see if your fund's invoice remains unpaid and make payment as soon as possible if it is.

Update on McCloud data issues guidance

We are currently working on guidance to assist administering authorities with McCloud data issues. The guidance will set out what options administering authorities in England and Wales may consider if they are unable to collect the data needed to implement the McCloud remedy. It will cover both missing data and data the authority is not confident is accurate.

The Scheme Advisory Board (England and Wales) hope to publish the guidance by the end of February 2023.

The McCloud data issues scoping group was set up to inform this guidance. The group has met three times and includes representatives from:

- each of the regional pension officer groups

- LGA
- actuaries
- Department for Levelling Up, Housing and Communities
- Department of Communities
- the Government Actuary's Department. The scheme advisory boards in Scotland and Northern Ireland will decide whether to publish similar guidance.

Training

Training programme 2023

All 2023 training events are available to book via the [LGA events website](#). The link for each course contains course details and how to book.

Bookings are on a first come, first served basis. For fairness, each course is capped at five delegates per organisation.

If you are unable to book a place on a course, email training.lgps@local.gov.uk with details of the course you would like to attend. Include how many places you require and the format - online or in person. If you require in person training, state the location you would prefer. We will keep a waiting list and will consider running additional training if the demand is high enough.

Employer role training (England and Wales)

- 25 April 2023 - Online
- 27 April 2023 - Online
- 30 May 2023 - Online
- 1 June 2023 - Online
- 20 June 2023 - London
- 27 June 2023 - Birmingham
- 25 July 2023 - Online
- 31 August 2023 - Online
- 26 September 2023 - Online
- 24 October 2023 - Online

Action for administering authorities - Share information about the Employer Role training with your Scheme employers.

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