

Monthly Report

July 2023

LB Barnet Pension Fund

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1. Performance summary

Work completed

KPI's for the period - 01.07.23 to 31.07.23							
WORKTYPE	TOTAL CASES JUNE	TOTAL CASES JULY	TARGET DAYS FOR EACH CASE	TARGET MET CASES	MINIMUM TARGET PERCENT	TARGET MET PERCENT	AVERAGE TIME TAKEN (Days)
AVC In-house (General)	5	2	20	2	85	100	6.5
Change of Address	53	30	20	28	85	93.33	2.9
Change of Bank Details	17	10	20	10	85	100	3
Death Grant to Set Up	0	2	10	2	85	100	9
Death In Retirement	27	28	10	26	85	92.86	8.43
Death on Deferred	1	0					
Deferred Benefits Into Payment Actual	60	36	10	35	90	97.22	3.61
Deferred Benefits Into Payment Quote	58	67	35	60	85	89.55	32.09
Deferred Benefits Set Up on Leaving	63	109	20	84	85	77.06	59.76
Dependant Pension To Set Up	10	5	5	5	90	100	4.8
Divorce Quote	7	3	40	3	85	100	8.33
DWP request for information	1	0					
General Payroll Changes	12	12	20	12	85	100	2.33
Initial letter Death in Retirement	27	28	10	26	85	92.86	4.71
Initial letter Death on Deferred	1	0					
Interfund Linking In Actual	4	13	35	3	85	23.08	121.54
Interfund Linking In Quote	19	16	35	15	85	93.75	14.06
Interfund Out Actual	5	11	35	11	85	100	8
Interfund Out Quote	6	11	35	10	85	90.91	10.55
Life Certificate	15	9	10	8	85	88.89	9

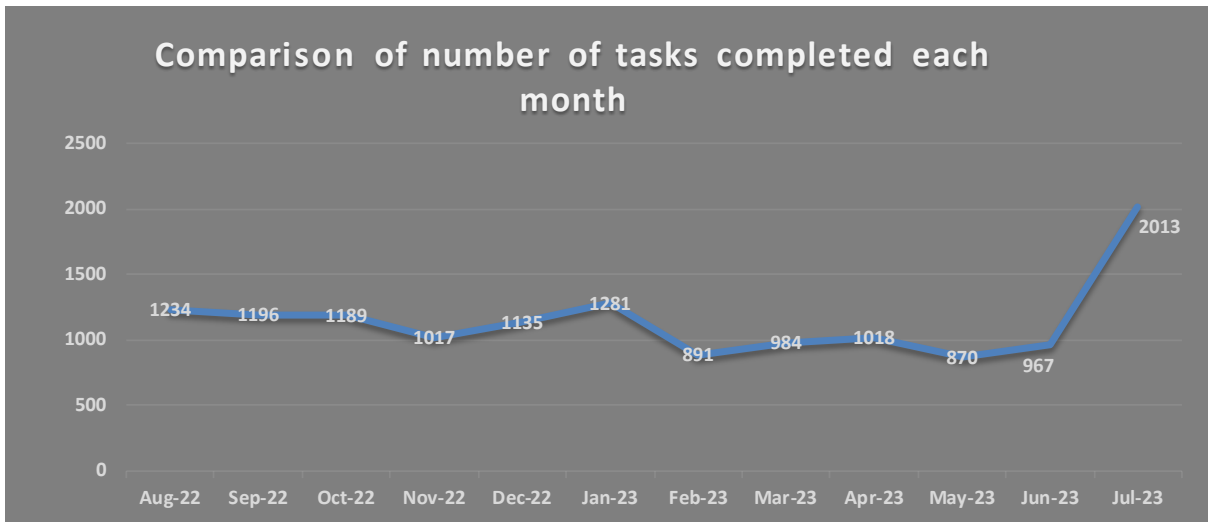
Monthly Posting	124	179	10	174	95	97.21	2.13
NI adjustment to Pension at State Pension Age	1	0					
Pension Estimate	23	10	10	7	90	70	18.4
Pension Saving Statement	0	1	20	1	100	100	1
Phone Call Received	213	193	3	187	95	96.89	1.72
Refund Actual	24	17	10	17	90	100	2.65
Refund Quote	23	40	35	40	85	100	3.93
Retirement Actual	15	27	10	27	90	100	3.74
Transfer Out Payment	1	0					
Transfer Out Quote	16	21	35	20	85	95.24	29.81
Update Member Details	136	1133	20	974	100	85.97	15.51
Totals	967 91.52%	2013				91.72%	

Comment - The KPI for Deferred Benefits Set Up on Leaving was not met this month due to the Team processing older cases as they continue to work through the outstanding cases.

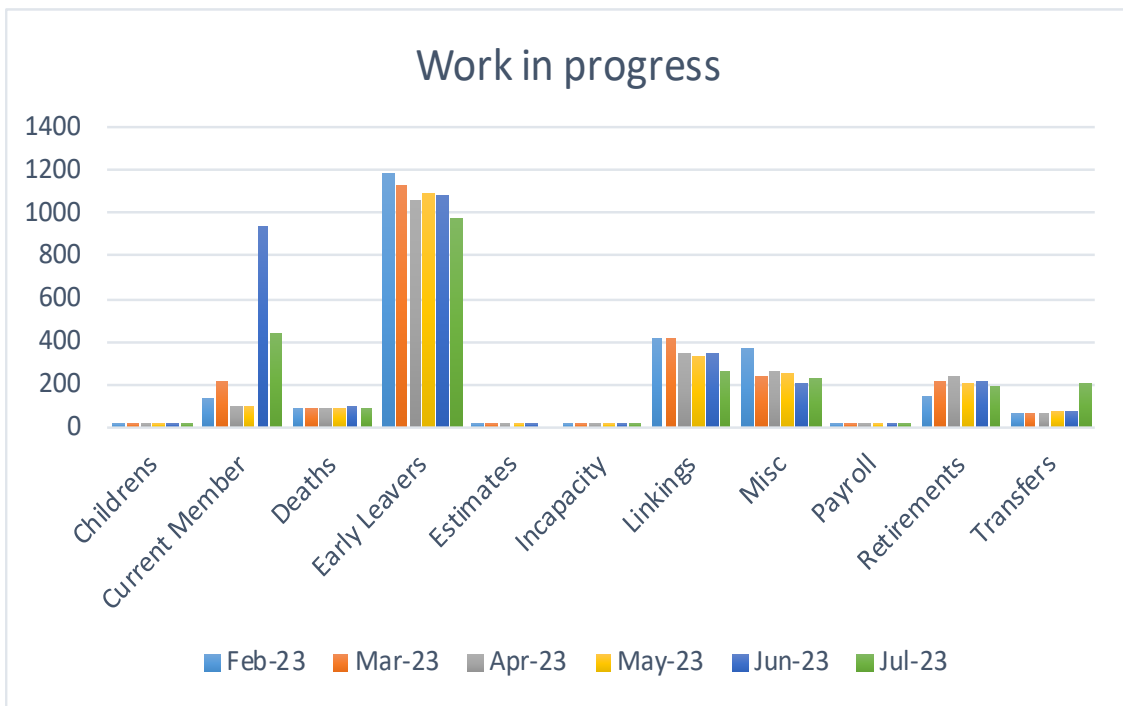
Comment - The KPI for Interfund Linking In Actual was not met this month due to staff processing older cases as they continue to work through the outstanding cases.

Comment - The KPI for Pension Estimate was not met this month due to one estimate request that was received had a potential date of retirement beyond six months. Estimates with a potential date of retirement in the near future have been prioritised. Requests for estimates were also received from members who had recently TUPE transferred and there were delays in getting the correct pay information from the previous employer.

Comment - The KPI for Update Member Details was not met this month due to a large number of hour changes being received from one employer. The forms which did not meet were processed just outside the target days.

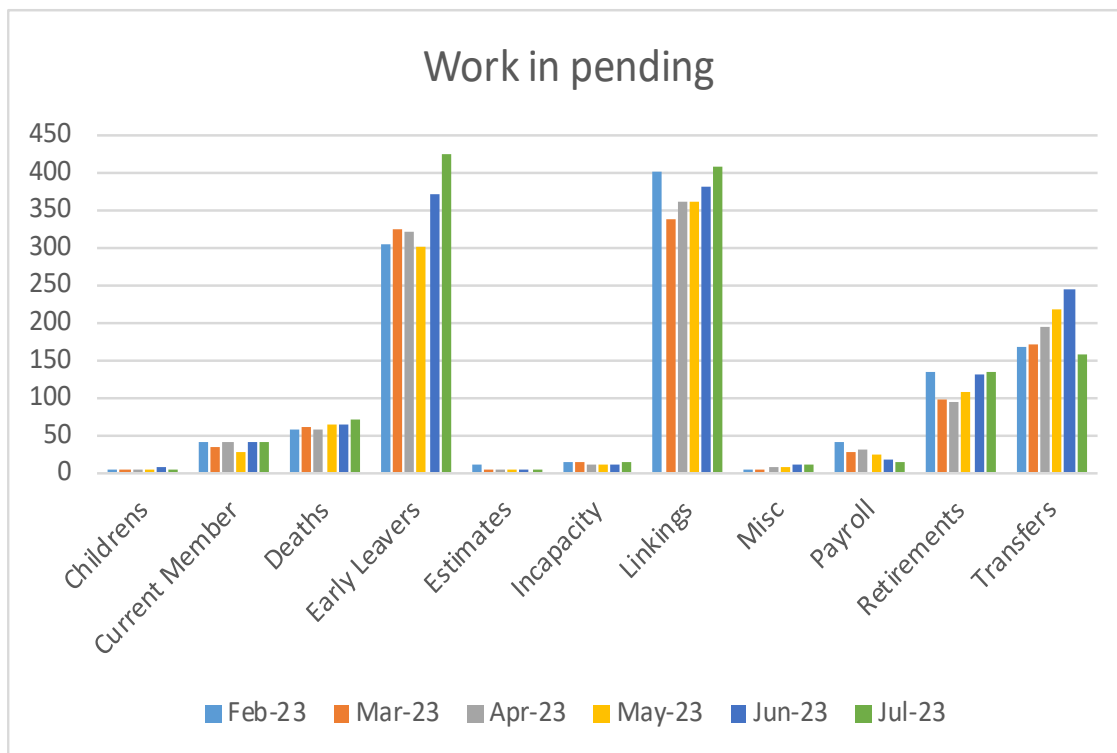


2. Work in progress



	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23
Childrens	2	2	2	3	5	7
Current Member	137	211	94	100	942	439
Deaths	89	87	87	84	93	84
Early Leavers	1182	1130	1058	1097	1083	972

Estimates	1	3	6	5	7	0
Incapacity	2	4	9	9	6	7
Linkings	416	408	344	335	342	261
Misc	361	241	258	246	207	222
Payroll	17	20	13	19	16	15
Retirements	147	216	236	208	214	188
Transfers	57	67	59	77	68	205



	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23
Childrens	2	4	4	5	8	3
Current Member	41	33	42	28	41	42
Deaths	59	62	59	64	65	71
Early Leavers	305	324	321	302	369	423
Estimates	11	3	2	4	2	1
Incapacity	14	15	11	10	12	13
Linkings	402	338	361	360	382	406
Misc	2	5	9	9	10	12

Payroll	40	29	30	25	16	15
Retirements	133	96	94	109	130	134
Transfers	169	171	195	216	244	158

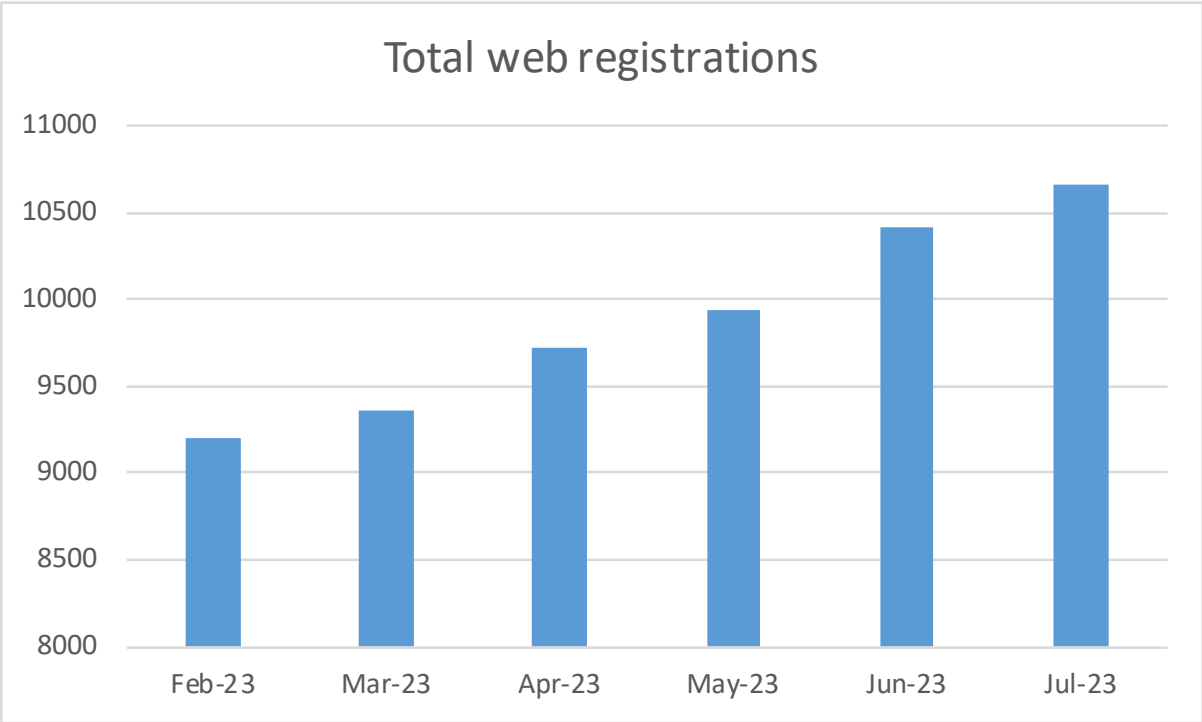
The tables above show processes grouped together and each group consists of a number of processes as shown below.

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	4,068	4,154
Pensioner	3,698	3,751
Deferred	2,641	2,751
Total number	10,407	10,656



4. Administration update

a) New Academies/Schools

Completed 0

Ongoing 0

New enquiries this month - 0

b) New Admission Bodies

Completed 1

Ongoing 6

New enquiries this month – 0

Ongoing

Name	Start date	Current position	Last action taken	Date completed
Innovate (Blessed Dominic)	01/09/2019	Contact forms issued to employer – 23/11/2022. Contacts set up – 09/12/2022. Contacts set up but new employer process not with Finance. PFR new employer process 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 are now up to date – 25/07/2023. Data to be submitted to Hymans.	

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 March 2020.	Monthly postings are now up to date – 18/07/2023. Data to be submitted to Hymans.	
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	Still ongoing as per Mark Fox at June 2023 meeting. To be referred to a PFR. Employer record updated to 'Did not proceed' – 26/07/2023.	26/07/2023

		agreements and then we can conclude our processes on these. Meeting held with Mark Fox and Signature – 28/07/2022. The company has gone out of business and admissions therefore appear unlikely to proceed. Last email from Mark Fox to Signature 11/08/2022. Mark Fox has referred this case 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. 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 on 06/03/2023 that he is chasing this up as we have received no response.	Mark Fox at June 2023 meeting confirmed they are nearly there with the admission signing. Mark to arrange further meeting with the employer.	
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.	

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.	
LBL After School Club (Manorside Primary)	01/09/2023	Provisional employer requested – 10/07/2023.		

c) Employers ceasing participation

Completed 1
Ongoing 8

Name	Date ceased	Current position	Last action taken	Date completed
Caterlink (Totteridge)	23/03/2020	Caterlink have submitted contributions. Queried with Finance – 13/09/2022 – chased up 19/10/2022. New employer process set up 06/12/2022. Contact forms sent – 07/12/2022. Contribution postings now complete. Leaver notifications requested – 24/01/2023. Leaver notifications received and leaver processes with Service Centre – 28/02/2023. Retirement quote being worked on in Service Centre – 03/04/2023.	Data submitted to Hymans – 04/05/2023. Last query responded to – 01/06/2023. Gav at Hymans confirmed that the cessation valuation should be concluded by the end of June 2023. Mark confirmed at meeting that cessation report has been received – 11/07/2023.	11/07/2023
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 leavers till outstanding: 1. Linking outstanding to another post where a leaver	

		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.	notification has not yet been received. 2. Linking quote offered and deadline has now passed. 3. Pay figure requested but not received. These have been referred to the PFR to chase up – 05/06/2023.	
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 June 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.	
Grasvenor Avenue Academy	31/08/2022	Academy closed. 19 leavers outstanding. 5 for which we don't have leaver notifications.	Employer Relations Team have contacted the employer	

		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.	with outstanding queries – 26/05/2023. 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.	Data with BW but currently on hold due to benefit being unclaimed.	
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 	
Caterlink – Holly Park School	31/03/2023	End of contract. Mark Fox is querying with the school if admission is to be requested from new contractor – 26/04/2023. New	Data submitted to Hymans – 11/07/2023.	

		contractor is Olive Dining. Cessation data to be submitted – 05/06/2023.		
Enigma Group	19/07/2023	Only active member left on 19/07/2023.	Cessation process set up – 17/07/2023.	

d) Other employer work

None

e) Internal Dispute Resolution Procedure (IDRP)

Stage 1

Completed 2

Ongoing 0

Date of appeal	Reason for appeal	Current position /outcome	Last action taken	Decision due	Date decision letter sent
19/04/2023	LTA tax charges	Appeal turned down.	Report requested from Service Centre – 25/04/2023. Report not received to date – to be chased up – 01/06/2023. Service Centre report now received.		01/08/2023
11/05/2023	Appeal against failure to perform due diligence in allowing a transfer out to proceed.	Appeal turned down.	Service Centre report received – 18/05/2023.		17/07/2023

Stage 2

Completed 0

Ongoing 1

Date of appeal	Reason for appeal	Current position/outcome	Last action taken	Decision due	Date decision letter sent
24/07/2023	Appeal against failure to perform due diligence in allowing a transfer out to proceed.		Referred to LB Barnet – 01/08/2023.		

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 transfer request was received by WYPF more than 5 years after leaving. However, acknowledged there had been errors and omissions by the previous administrator.	

g) Compensation cases – July to September 2023

None

h) Member issues

None

i) Employer issues

None

5. Membership numbers

Membership status	ACTIVES	DEFS	PENS	BENS	PRESERVED REFUND	LVRS OPTIONS PENDING
Numbers	9,879	9,433	8,381	1,019	1,384	389
Change from last month (+ / -)	+179	+29	+38	-3	+9	-42

6. Management overview

a) Staffing update



Finance – Recruitment for the Senior Finance Officer post has now been completed and it went to a Finance Officer in the Team. There are now two Finance Officer posts vacant and these will be recruited to shortly.

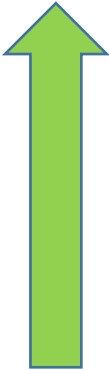
Service Centre – Six new Pension Officers have been appointed and they will start in September.


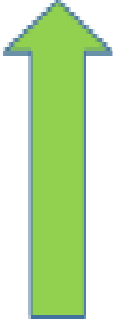


Employer Relations Team – There is one vacancy in the Employer Relations Team for a Pension Fund Representative which is an additional post within the Team. The job has been advertised and has recently closed. The applications will be reviewed and shortlisting for interviews will start soon.


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 September due to annual leave in the 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.	Drop three has been received from Civica and is a large drop in the series. It is currently being worked on and the UPM Team are looking at what needs to be done and developing an implementation programme. LGA have done a communication document for background training and information on McCloud. This has been taken forward with a view to sending it out.	The UPM Team are still working on Drop two & three but an internal solution is in place to ensure we can deliver McCloud if needed.		Regulations to be introduced from 1 st October 2023 as per current proposal.
Phase 3 (Monthly postings)	Move all the functionality onto the front end website to enable Employers to process the data.	The IT Team are currently working with Bradford IT on updating some underlying servers to resolve some security and technical issues that will allow MP3 to move forward. Internal status update meetings are being undertaken on a regular basis with Senior Management. Once the issues have been resolved a further penetration test can be done.	The third penetration test is due to be done as the previous issues have now been resolved. The Senior Management Team continue to meet to ensure this project keeps moving forward.		2023/2024
Pensions Dashboard	Will enable individuals to access their pension information online, securely and all in one place.	We have evaluated all the tender responses and these have been through Senior Management and the Technical Team for scoring the bidders. There is a clear preferred bidder which	Bravura have been chosen as the ISP provider for Pensions Dashboard, subject to the final checks. We are still waiting for the new staging dates from DWP & PDP. WYPF have had three		

		<p>will be confirmed at the end of July. We have had two meetings with TPR and DWP regarding the Pensions Dashboard reset. These have been very productive meetings on how PDP can launch late and avoid a 'crunch' of providers looking to join the eco PDP system. We were in agreement with the legislative change which has been implemented and we expect to receive the revised dates from TPR in a scheduled meeting pre-Summer recess but this may be subject to change. We have seen PDP with 74 other providers in relation to connectivity scheduling, connection and data required to be provided through the eco system as this is subject to amendment. We have also raised with the LGA the significant changes on how AVCs will be handled through the PDP. The LGA are currently surveying all AVC providers in the UK. We have reviewed the data quality requirements and WYPF/Bradford's current providers to be able to provide certain data i.e. postcodes. We are working with Norfolk and their framework to procure some specialist provision to improve/affirm our data quality. This should be available by the end of the year.</p>	<p>meetings with TPR and DWP attended one of the meetings. They are happy we are where we should be with Pensions Dashboard. A new technical lead has been appointed for PDP and details will be announced shortly.</p>		<p>2022/2023</p>
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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.	A further meeting has been requested with IT to ascertain what further development is necessary to complete the KPI review and ensure the accuracy of the KPI reports.	IT may not be available to develop the remaining stage to stage reporting of the KPIs until at least MP3 has gone live. Further discussions are underway regarding introducing a retirement quote and linkings measure and clarifying and measuring outstanding work.		2022/2023
Data Improvement Plan	Data falls into 2 categories: Common & Scheme Specific (also known as Conditional)	The IT Team are currently working on the data quality for PDP and will look at other areas of data improvement in the next few months.	The issues with some of the historic GMP data we have on members records will be looked at in August by IT, Service Centre & Senior Management Team. This should help to improve the data quality and the data scores for each Fund.		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 – Initial design concepts produced and undergoing internal review for stage 2 drafting. Portals –In-house API functionality has been implemented to the portal, this houses any future Portal-UPM connection. We are currently accessing a data dump based on a backup of an existing UPM database. This means data is now accessible via the portal, a big milestone in our project. Registration	 	Site live by the end of the calendar year (2023) Portals live by the end of the calendar year (2023)

			methods have been reworked, allowing for more flexibility when it comes to multi-factor authentication. Await support from Civica regards the Civica built APIs still.		
Automation	UPM Automation is the project to automate some of the work currently being done manually by administrators within the Service Centre.	We will have completed the first two phases by the end of July and we will publish the results once they are completed. We will then confirm the next 2 areas to be automated based on capacity in the Team to take this forward.	The UPM Team are on track to automate two areas every two months. A final report will be shared by the end of August on the first two processes that were automated.		Ongoing

8. Regulatory update

[LGPC Bulletin 240 - July 2023 \(lgpslibrary.org\)](#) has now been published, please take a few minutes to read the bulletins.

SAB

Code of transparency roadshows

The SAB is running a series of free, in person training sessions on investment cost transparency. The training is aimed at local pension board and committee members, as well as administering authority officers. Session dates and locations are listed below. Click on the location for a link to the booking page on the LGA's website.

12 Sept [Wolverhampton](#)

13 Sept [Leeds](#)

21 September [Edinburgh](#)

26 Sept [Cardiff](#)

SAB plans to run two additional sessions in September or October 2023 – one in London and one online. If you are interested in attending either of these two sessions, please [contact the SAB secretariat](#). We will notify you when they are available to book.

The sessions will provide:

- an explanation of the purpose and background of SAB's ground-breaking code of transparency
- a case study from an L G P S fund on how investment cost information has been used
- a troubleshooting session on how to use the online reporting system – for officers only
- a facilitated discussion on the information that fund officers should be receiving and how this information should be reported to pension boards and committees – for officers only.

If you are asked for a purchase order number when you book, please use SAB 2023.

LGPS England & Wales

SCAPE discount rate and actuarial factors – second batch

On 3 July 2023, Rachel Abbey emailed administering authorities to let them know that DLUHC has cleared a second batch of actuarial factors for use.

The factors in the second batch that have been cleared for use, their effective dates and the impact on calculations are summarised below:

1. **Non-Club transfer in factors: tables x-209 to x-216.** The new factors are in force from 3 July 2023. Any cases on hold can now be processed using the new factors. Any interfund cases where the transfer value of final salary benefits will be used to buy additional pension in the CARE scheme can now be processed. Both the transfer out payment and the transfer in calculation should be based on the new factors.

2. **Non-Club transfer in with final salary link: table x-217.** The new factors are in force from 3 July 2023. If a member elects to complete a non-Club transfer with a final salary link where there is no guarantee on or after 30 March 2023, the new factors apply. If you supplied a guaranteed quotation before 30 March 2023, and the member replies within the guarantee period, use the old factors.

3. **Early retirement: table x-401.** The new factors are in force from 3 July 2023. If a member's early retirement date is 3 July 2023 later, the new factors apply. The new factors are lower than the ones in force before 3 July 2023. Any early retirement benefits already quoted will increase as a result of the change.

4. **Late retirement: table x-402.** The new factors are in force from 1 September 2023. A longer lead-in time has been allowed for these factors:

- to allow time for software changes to be made, and
- because some members' benefits may be lower using the new factors. LGPS benefits are increased for late retirement after Normal Pension Age (NPA):
- benefits built up before 1 April 2014 are increased if they are taken after age 65
- benefits built up from 1 April 2014 are increased if they are taken after State Pension Age, or after age 65 if this is later.

SCAPE discount rate and actuarial factors – third batch

On 28 July 2023, Rachel Abbey emailed administering authorities to let them know that DLUHC has cleared the third batch of actuarial factors for use.

The factors in the third batch that have been cleared for use, their effective dates and the impact on calculations are summarised below:

1. **Trivial commutation factors: tables x-501 to x-503.** The new factors are in force from 28 July 2023. Where a quotation was provided before 28 July 2023 and the nominated date was before 28 July 2023, use the old factors. In all other cases, use the new factors

2. **Inverse commutation factors: tables x-504 and x-505.** If you have already provided a quotation and the retirement date was before 28 July 2023, use the old factors. In all other cases, use the new factors.

3. Scheme pays (Annual allowance) factors: table x-603. For a deferred or active member, if the election date was before 28 July 2023, use the old factors. If the election date is 28 July 2023 or later, use the new factors. If the member is over their Normal Pension Age (NPA), or if they make a Scheme 10 pays election when their retirement figures are already being processed, use the Lifetime Allowance factors – see 4 below. The relevant date for Annual allowance purposes is the ‘day coincident with the end of the pension input period’. For Annual allowance cases, it is not the relevant date which determines which factors are used, it is the Scheme pays election date.

4. Factors for calculating Lifetime allowance debit: tables x-609 and x-610. The Government has announced that no Lifetime allowance charges will apply in 2023/24 and the Lifetime allowance will be abolished completely from 6 April 2024. The LTA factors are still required as they are used to calculate certain Annual Allowance Scheme pays debits.

Change in early retirement factors – resources updated

We have updated the following resources to reflect the new early retirement factors that are in force from 3 July 2023:

- [Taking your pension](http://www.lgpsmember.org) page of the LGPS member website www.lgpsmember.org
- Retirement planning guide for members – version 1.5 published
- Full guide for councillors - version 2.4 published

You can find the latest versions of our guides on the [Administrator guides and documents](http://www.lgpsregs.org) page of www.lgpsregs.org.

Action: WYPF have updated the member guides and websites to reflect the new early retirement factors.

Pensions dashboards

Pensions Dashboards Amendment Regulations 2023

The Department for Work and Pensions (DWP) has laid the [Pensions Dashboards \(Amendment\) Regulations 2023](#) [SI2023/858]. A revised staging timetable will be set out in guidance and all schemes in scope will need to connect by 31 October 2026. The staging timetable will indicate when schemes are scheduled to connect, based on their size and type.

Staging dates – TPR expectations

The Pensions Regulator (TPR) has updated its [‘Failing to comply with dashboards duties’ guidance](#). The purpose of the updates is to outline what schemes will need to do to demonstrate that they have had regard to the staging timetable. The staging timetable will be set out in connection guidance.

TPR expects schemes to do the following to show that they ‘have regard to the connection guidance’:

- Connect to dashboards by the connection deadline of 31 October 2026 that is set out in legislation. Failure to do so could result in regulatory action by TPR.
- A revised staging timetable will be set out in guidance which will indicate when schemes are scheduled to connect. All trustees and scheme managers must have regard to this guidance. Failure to do so will be a breach.
- Although the timelines in guidance will not be mandatory, schemes will be expected to demonstrate how they have had regard to the guidance. Amongst other considerations, this means that scheme managers:
 - should not make decisions about connection until they have engaged with the guidance
 - must be able to demonstrate that they have adequate governance and processes for making such decisions. The reasoning for the decisions should be clearly considered and documented, as should how relevant risks are identified, evaluated and managed
 - should make sure that they have access to all the relevant information before making decisions and acting on them. This includes engaging with those who are supporting them to develop a practical delivery plan. Clear and accurate audit trails need to be kept to demonstrate the decisions made, the reasons for them and the actions taken.
- A phased approach to staging enables a controlled and well-planned connection, reduces the risk of provider capacity constraints and means savers can realise the benefits of pension dashboards as early as possible.
- Continuing to prepare for dashboards by engaging with those who will support them with their dashboards duties, such as integrated service providers and administrators to:
 - assess the potential impact of these changes on their schemes
 - agree a practical delivery plan, and
 - continue activity on getting to grips with member data.

PASA updates data accuracy guidance

The Pensions Administration Standards Association (PASA) has published an updated version of its [dashboards data accuracy guidance](#).

As we reported in [Bulletin 227](#), the guidance was originally published in July 2022. The updated guidance reflects the dashboards reset. PASA encourages schemes to continue to review their data and take action to ensure that key matching data is both present and accurate.

Training

Annual governance conference 2024

Our annual governance conference retains its popular lunchtime to lunchtime schedule. It will take place on Thursday 18 and Friday 19 January 2024 at the

Principal Hotel in York. We are finalising the programme and securing speakers. Booking will open in July 2023.

If you would like to be notified when bookings open or if you have any questions about the conference, please email elaine.english@local.gov.uk

Fundamentals training 2023

Our Fundamentals training for 2023 is now open for booking.

Fundamentals is a three-day training course predominately aimed at elected members and others who attend pension committees and local pension boards. Past delegates have also included trade union and employer representatives, and officers who support committees and boards. The course provides a scheme overview and covers current issues in relation to administration, investments and governance of the L G P S. All sessions are delivered by experts in their field. See the course programme for full details – the timings shown only apply to the in-person sessions.

We are running the in-person training in two locations - London and Manchester, and online.

We have listened to feedback and will be delivering each day of the online sessions over two days. You only need to complete one booking per day – this will automatically book you on both of the half days. It is not possible to book for a half day. The online sessions will be delivered using Zoom.

Attending all three days will help delegates meet the relevant requirement for knowledge, skills and understanding either required in statute or encouraged by relevant guidance.

Cost

In person - £280 plus VAT per session. The price is inclusive of lunch and refreshments.

Online - £240 plus VAT per session.

We recommend early booking as places are limited. You can book online through the [LGA events page](#). We are unable to take manual bookings. Please find links to the individual sessions below. Day one

- 5 October – Manchester, Piccadilly Hotel
- 12 October – Westminster, LGA offices
- 19/26 October – online. Day two
- 2 November - Westminster, LGA offices
- 8 November - Manchester, Piccadilly Hotel
- 16/23 November – online. Day three
- 5 December - Westminster, LGA offices

- 13 December - Manchester, Piccadilly Hotel
- 11/19 December – online.

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