

Affinity Pre-Retirement workshops

The East Riding Pension Fund (ERPF) has an arrangement with Affinity Connect, one of the largest providers of retirement and redundancy services to the public sector to offer pre- retirement workshops to Local Government Pension Scheme (LGPS) members to help them prepare for the significant changes which take place at retirement.

The workshops provide information on a comprehensive range of topics raising awareness of issues to be considered and decisions that need to be made before retirement and are available **free of charge** should you wish your staff to benefit from this professional service.

Workshops are pre-booked throughout the year and the dates currently available are provided below. If you are agreeable to allowing your staff to use them it would be appreciated if you could ensure that staff are made aware of the workshops.

For further information or to book a place staff should contact: Bookings@affinityconnect.org or call Freephone 0800 0196076 and select option 1 – training.

Course Date	Employer	Venue	Location	Duration
15 June 2016	East Riding of Yorkshire Council	Leisure Complex	Beverley	1.00 – 4.15pm
22 June 2016	North Lincolnshire Council	Civic Centre	Scunthorpe	1.00 – 4.15pm
23 August 2016	North East Lincolnshire Council	Doughty Learning Centre	Grimsby	9.30am – 4.00pm
23 August 2016	North Lincolnshire Council	Civic Centre	Scunthorpe	1.00 – 4.15pm
14 September 2016	East Riding of Yorkshire Council	Leisure Complex	Beverley	1.00 – 4.15pm
24 October 2016	North Lincolnshire Council	Civic Centre	Scunthorpe	1.00 – 4.15pm
7 December 2016	East Riding of Yorkshire Council	Leisure Complex	Beverley	1.00 – 4.15pm
15 February 2017	North East Lincolnshire Council	Doughty Learning Centre	Grimsby	9.30am – 4.00pm
6 March 2017	North Lincolnshire Council	Civic Centre	Scunthorpe	1.00 – 4.15pm
30 March 2017	East Riding of Yorkshire Council	Leisure Complex	Beverley	1.00 – 4.15pm

Workshops can also be booked direct by yourself if you prefer to host these internally by contacting Sarah Turner on 0800 019 6076 or emailing bookings@affinityconnect.org and quoting East Riding Pension Fund. For further information about Affinity Connect you may wish to visit their website at www.affinityconnect.org.

Annual Returns 31 March 2016

In the earlier employer bulletins (issue 9 and 12), information was provided regarding the submission of the annual year end returns, including a timetable for the submission and validation of the year end return for 31 March 2016.

The East Riding Pension Fund received 171 year end returns by the deadline of 19 April 2016; all of which have now been assessed and validated. Where queries have been identified the Fund has returned the year end file back to the employer for amendment or clarification. Employers who have received the year end file back for further action have until 17 June 2016 to resubmit an accurate return.

Any year end returns which were submitted after 19 April 2016 will be validated by the ERPF as soon as possible.

Employers are reminded that the East Riding Pension Fund can only guarantee year end data will be loaded to member records in order for annual benefit statement to be issued by 31 August 2016, where an accurate year end return has been submitted by 17 June 2016.

Guides for Employers Participating in the LGPS

The Pensions and Lifetime Saving Association's (PLSA's) have issued the first of a series of guides for employers participating in the LGPS:

- A guide for employers participating in the LGPS: An introduction to the LGPS for scheduled bodies
- A guide for employers participating in the LGPS navigating entry into the LGPS: for local government contractors

Both documents are available on the PLSA's website

<http://www.plsa.co.uk/PolicyandResearch/DB/Employers-participating-in-the-LGPS.aspx>

Later this year, the PLSA plan to issue further guides for employers, focusing on participating and leaving the scheme

Pension Obligations for Outsourcing and Employee Transfers

To follow on from the item above (Guides for Employers), and as a general reminder, the earlier employer bulletin (issue 6 – November 2015) included a factsheet which covered several key areas where it is important that scheme employers are aware of and understand the statutory LGPS requirements and employer responsibilities.

One of the key areas covered by the factsheet is 'Pension Obligations for Outsourcing and Employee Transfers'. This is particularly important for scheme employers who are considering the option of outsourcing a function of their organisation to a contractor. When this occurs it is imperative that consideration is given at an early stage to the pension obligations and that the scheme employer understands its responsibilities, both to affected employees who are members of the LGPS and to the Fund.

The ERPF are frequently made aware of outsourcing which has already taken place and the Fund has not been notified and no pension provision has been considered for those staff transferring. As a reminder for all scheme employers an extract from the factsheet has been provided below. The full factsheet is also available on the ERPF website www.erpf.gov.uk.

Admitted Body Status

Admitted body status provisions were introduced into the LGPS in 1999 to allow contractors, who take on local authority services or functions, to offer transferring employees continued eligibility for the LGPS during the contract.

*Local authorities as best value contracting authorities (including police and fire) are required to comply with The Best Value Authorities Staff Transfers (Pensions) Direction 2007. This means that a best value authority **must** secure pension protection for each TUPE transferring best value authority employee which must be the same as, broadly comparable to, or better than, those they had a right to acquire prior to the transfer.*

The Fair Deal guidance published by HM Treasury applies to all other employers (including academies) and sets out how pension issues should be dealt with when employees who are members of the LGPS are compulsorily transferred to an independent contractor by way of a transfer to which TUPE applies. It is the existing employer's responsibility to ensure that affected employees are provided with access to the LGPS in their new employment while they continue to be employed on the transferred service or function.

Existing scheme employers who plan to award a contract which will involve a compulsory transfer of employees should make the Fair Deal guidance clear at an early stage to potential contractors. It is good practice for the outsourcing scheme employer to obtain an indicative employer contribution rate and bond amount from the actuary to include in the tender documentation before commencing a procurement exercise.

An employee affected by outsourcing whose employment is transferred to the successful contractor cannot continue to be a member of the LGPS if an admission agreement is not in place. In many cases the application to become an admitted body can take several months and where applications are not submitted early enough this can result in employees losing their right to be a member of the LGPS for that period of time. It is strongly recommended that no employees are transferred until an agreement is in place.

Automatic Enrolment Guidance

Scheme employers who participate in the LGPS are required to comply with automatic enrolment. Both the Local Government Association and The Pensions Regulator websites have useful guides and information relating to automatic enrolment and these are available on the websites below:

- The LGA Brief and a Full Auto Enrolment guides - <http://www.lgpsregs.org/index.php/guides/administration-guides-to-the-2014-scheme>
- The Pensions Regulator step by step guide to Auto Enrolment - <http://www.thepensionsregulator.gov.uk/en/employers>

Multiple Concurrent Employments – Employee Leaver Form

The 'Employee Leaver Form' includes a section for scheme employers to provide the pay information of any remaining concurrent employments (i.e. employments which were held at the same time). A recent exercise carried out by the East Riding Pension Fund has identified that in many cases this section of the leaver form has not been completed by the employer and as a result this pay figure will now need to be requested. In some cases the 'relevant date' of the pay figure required is several years ago and may require employers to access and view historic pay information in order to provide the correct figure.

In order to avoid this additional work in the future, can all employers please ensure that this section of the leaver form is completed when concurrent employment applies to a scheme member who has left one of their employments. Guidance of when and how this section should be completed can be found in the 'Employee Leaver Form Guide 2016/17' which is available on the ERPF website www.erpf.gov.uk/employers/.

Revised Pension Administration Form Guidance

Two guidance documents aimed to help employers complete and submit pension administration forms have recently been updated:

- The 'Employee leaver form guidance' has been updated to version 1.2 to include the reviewed procedures for the 2008 definition of final pay (full time equivalent) to be completed in all cases (as detailed in employer bulletin 20 – issued May 2016).
- The 'Absences guide' had also been updated to version 1.2.

Both these revised guidance notes will be available shortly on the ERPF website www.erpf.gov.uk/employers/.

And Finally

Thank you for taking the time to read what is the first in a series of new style employer bulletins.

These employer bulletins will be e-mailed each month directly to employer contacts which have been provided to the ERPF. If you wish to update the contact details for your own organisation please supply the new details to: liz.vollans@eastriding.gov.uk and I will update the contact details for future bulletins.

The content of this and future employer bulletins will be specific to issues surrounding the LGPS and the ERPF and I hope you will find this (and future) bulletins useful.