

## New LGPS 2015 – Implementation Plan

### Objectives

- To ensure the effective implementation of the 2015 Regulations
- Identify and work with key stakeholders to ensure that they are able to comply with the requirements of the new scheme
- Effectively communicate the key features of the new scheme with all stakeholders
- Carry out appropriate training to meet the individual needs of all the stakeholders
- Ensure pensions administration staff have sufficient knowledge and technical capability to implement the new scheme
- Ensure that appropriate Payroll and Pension Administration systems have the necessary software applied

### Stakeholders

	<b>Area of Interest</b>
<b>Internal</b>	
Pensions Admin Team	Administer the LGPS (pay benefits, reconcile contributions, interpret legislation, etc.)
Payroll Team	Make deductions from pay and account for pension contributions deducted from SBC staff
HR Admin Team	Responsible for issuing contracts of service, with wording agreed in association with HR Advisory Team
HR Advisory Team	Represent employer interest and act as the main liaison with recognised Trade Unions
HR Systems	Responsible for ensuring the HR System calculates and deducts pension contributions in accordance with legislation
Corporate Finance	Liaison on budgetary and governance implications
Elected Members	Members of the LGPS Pension Committee
<b>External</b>	
Admitted & Scheduled Bodies	Members of the Scottish Borders Council Pension Fund – as listed in following table
SPPA	Responsible for making regulations, prior to them being paid before parliament, and providing guidance
SPLG	Quarterly meeting held with all Pension Funds in Scotland to discuss matters affecting the Funds generally
LGA	Provision of advice and support in association with SPPA
Aquila Heywood	Provider of the Pensions Administration System and responsible for ensuring this meeting the current legislation
Northgate	Provider of the Payroll System for SBC and responsible for ensuring they can meet the current legislation
GAD	Delivers actuarial guidance as required under the legislation
Barnett Waddingham – Fund Actuary	Carries out triennial actuarial valuation and provides information for final accounts on an annual basis
Trade Unions	Represent the employee interests of their membership

**Contact Details for Admitted & Scheduled Bodies**

<b>Employer</b>	<b>Contact</b>	<b>Position</b>	<b>Address</b>	<b>E-mail</b>
Scottish Borders Housing Association	Ms Carly Stewart	Director of Finance & Corporate Services	South Bridge House Whinfield Road Selkirk TD7 5DT	<a href="mailto:cstewart@sbha.org.uk">cstewart@sbha.org.uk</a>
	Nicky Wood	Finance Manager		<a href="mailto:nwood@sbha.org.uk">nwood@sbha.org.uk</a>
Borders College	Mr Pete Smith	Director of Finance & Resources	Borders College Scottish Borders Campus Nether Road Galashiels TD1 3HF	<a href="mailto:psmith@borderscollege.ac.uk">psmith@borderscollege.ac.uk</a>
	Debbie Kerr	Head of Human Resources		<a href="mailto:dkerr@borderscollege.ac.uk">dkerr@borderscollege.ac.uk</a>
Borders Sport and Leisure Trust	Mr Ewan Jackson	Chief Executive Officer	Melrose Road Galashiels TD1 2DU	<a href="mailto:Ewan.jackson@bslt.org.uk">Ewan.jackson@bslt.org.uk</a>
BC Business Consultants	Same as Borders College			
Visit Scotland	Mr Richard Lamont	Rewards Manager	Visit Scotland Ocean point 1 94 Ocean Drive Edinburgh EH6 6JH	<a href="mailto:Richard.lamont@visitscotland.com">Richard.lamont@visitscotland.com</a>
	Ms Linda Russell	Payroll Administrator		<a href="mailto:Linda.Russell@visitscotland.com">Linda.Russell@visitscotland.com</a>
Jedburgh Leisure Facilities Trust	Ms Sharon Turnbull	Finance Manager	Laidlaw Memorial Pool Oxnam Road Jedburgh TD8 6QH	<a href="mailto:Info.lmp@btconnect.com">Info.lmp@btconnect.com</a>
Lothian and Borders Community Justice Authority	Mr Rob Strachan	Chief Officer	Lothian & Borders CJA Scottish Borders Council Area Office Rosetta Road Peebles EH45 8HL	<a href="mailto:rscja@scotborders.gov.uk">rscja@scotborders.gov.uk</a>
Amey Community Limited	Mr Graeme Houston	Pension Support Consultant	Winchester House Heatley Road Oxford Science Park Oxford OX4 4GE	<a href="mailto:Graeme.houston@amey.co.uk">Graeme.houston@amey.co.uk</a> <a href="mailto:onehr@amey.co.uk">onehr@amey.co.uk</a>

The following Bodies have no active contributing members, deferred or retired members only, therefore will be excluded from communications: -

- Galashiels Youth Project
- Berwickshire Housing Association
- Heriot Watt (former Scottish College of Textiles)
- Project '80 Council Burnfoot
- Red Cross Housing Association
- Scottish Borders Careers

	<b>Stage</b>	<b>Summary of Actions</b>	<b>Delivered</b>
<b>1</b>	<b>Gain knowledge of New Scheme Legislation</b>		
1.1	The Local Government Pension Scheme (Scotland) Regulations 2014, laid before the Scottish Parliament 9 <sup>th</sup> June 2014	Study the regulations and asses the full impact of changes. Utilise technical help from SPPA, SPLG and LGA.	
1.2	The Local Government Pension Scheme (Transitional Provisions and Savings) (Scotland) Regulations 2014, laid before the Scottish Parliament 22 <sup>nd</sup> August 2014	Study the regulations and asses the full impact of changes. Utilise technical help from SPPA, SPLG and LGA.	
1.3	The Local Government Pension Scheme (Governance) (Scotland) Regulations 2014	Currently under a period of consultation, due to close no later than 11 <sup>th</sup> November 2014	
<b>2</b>	<b>Scheme Member Communications</b>		
2.1	Issue initial information on scheme changes to SBC members	Arrange for inclusion in SB Update	November 2013
2.2	Issue initial information on scheme changes to other bodies members	Request this be issued by employing body	November 2013
2.3	Issue information on <a href="http://www.scotlgps2015.org">www.scotlgps2015.org</a> website to SBC members	Arrange for inclusion in SB Update	November 2014
2.4	Issue information on <a href="http://www.scotlgps2015.org">www.scotlgps2015.org</a> website to other bodies members	Request this be issued by employing body	October 2014
2.5	Issue details of scheme changes along with 2014 Annual Benefit Statements		November 2014
2.6	Issue details of scheme changes to those scheme members who joined the scheme on or after 1 <sup>st</sup> April 2014		
2.7	Issue details of scheme changes to all new members after 2.6		

	<b>Stage</b>	<b>Summary of Actions</b>	<b>Delivered</b>
	has been completed		
2.8	Review content on SBC website		
2.9	Issue new scheme booklet to all scheme members	Expected that this will be delivered by LGA in January 2015, will then need to be tailored to meet requirements of our Fund prior to issue	
2.10	Consider holding Roadshows for SBC members	Is there any merit in holding roadshows in order to deliver key messages of the changes to the scheme, likely that this will be off most interest to those nearing retirement age	
2.11	Consider holding Roadshows for other bodies members	As 2.10, gauge interest in holding such events in discussion with employer representatives	
<b>3</b>	<b>Employer Communications</b>		
3.1	Initial advice that LGPS is changing	Advise all bodies that the scheme is changing, providing details of the headline changes	November 2013
3.2	Follow up information, advising details of the <a href="http://www.scotlgps2015.org">www.scotlgps2015.org</a> website and the payroll processing guidance	Letter to be issued to all bodies, enclosing links to the website and a copy of the payroll processing guide. Will also advise that a date is being set for a meeting with all bodies to discuss the impact of the requirements on them as employers	October 2014
3.3	Presentation to key employer staff (HR/Payroll/Finance)	Delivery of presentation designed by LGA	
3.4	Provide detailed information on key areas of change: <ul style="list-style-type: none"> <li>• Tiered contribution determination</li> <li>• Material change for tiered contribution</li> <li>• Assumed pensionable pay</li> <li>• Reporting requirements (documentation)</li> </ul>		
3.5	Assist with modification of forms, procedures and policy statements for each of the bodies		
3.6	Assist with modification of wording included on bodies website relating to LGPS		
<b>4</b>	<b>Staff Training</b>		
4.1	LGA Employer Training	Attended by members of the Pensions Administration Team, dealing with the payroll processing requirements. Staff who attended the training session will be responsible for pulling together main changes and training materials for the other bodies	August 2014

	<b>Stage</b>	<b>Summary of Actions</b>	<b>Delivered</b>
4.2	LGA Administrators Practitioner Training	In the process of being arranged, likely to be delivered January/February 2015	
4.3	Pensions Administration Team Training – Regulations	Passing on of knowledge gained from above event to ensure all team members have the required knowledge to prepare them for the upcoming changes.	
4.4	Pensions Administration Team Training – Systems	Covering the changes required for system entry into the Altair application	
4.5	SBC Payroll Team Training – Regulations	Internal training session to deliver the key areas of change as described at 4.2	
4.6	SBC Payroll Team Training – Systems	Covering the changes required for system entry into the Resourcelink application	
<b>5</b>	<b>Employer Training</b>		
5.1	Training Session/Workshops on key areas of change: <ul style="list-style-type: none"> <li>• Tiered contribution determination</li> <li>• Material change for tiered contribution</li> <li>• Assumed pensionable pay</li> <li>• Reporting requirements (documentation)</li> </ul>	Delivered as part of the employer communications session	
<b>6</b>	<b>Software Changes</b>		
6.1	Modification of the Aquila Heywood Altair Pension Administration System	2015 Pensions Reform Addendum signed July 2014	
6.2	Modification of the Northgate Resourcelink Payroll System	Northgate have delivered a solution for similar legislation in England & Wales	
<b>7</b>	<b>Procedures and Documentation</b>		
7.1	Identify procedures to be reviewed	Review all procedures and identify where changes are required	
7.2	Review all documentation and update references to new regulations	For both internal and external documents	
<b>8</b>	<b>Policy Changes</b>		
8.1	Identify any areas that require an employer policy to be updated	Where required, draft policy and then arrange for publication	

The above plan will be updated when tasks have been completed or new tasks need to be added.