

## The Results

### An update for Employers in the Local Government Pension Scheme (LGPS)

Dear Colleague,

We are pleased to publish the results of the 2020 Employer Survey. Thank you to everyone who took the time to complete the survey.

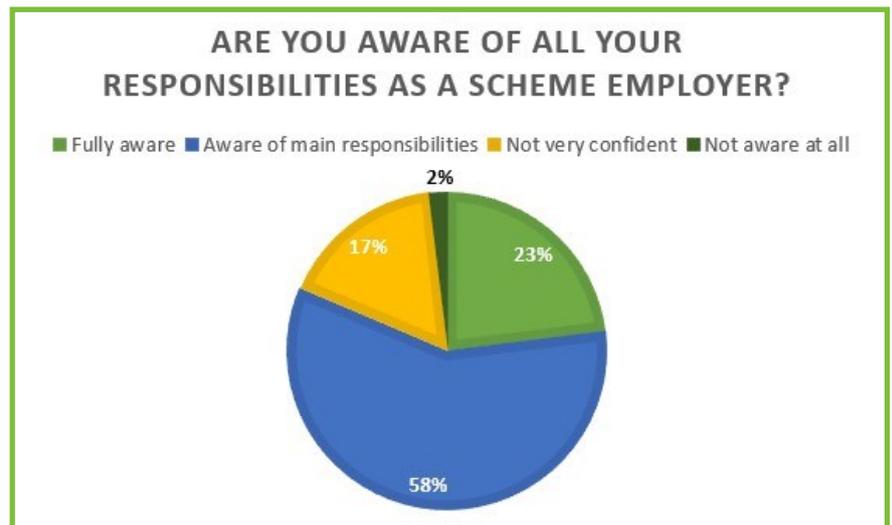
We hope that you find the information contained within this report both enlightening and helpful.

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# Your Responsibilities as a Scheme Employer

When asked how aware of their responsibilities they were, 58% of Employers responded saying that they were 'Aware of their Main Responsibilities'. While 19% of stated that they were either 'Not aware at all' or 'Not very confident' in their responsibilities. Only 23% of responders classified themselves as 'Fully Aware'.



## An Employer's Main Responsibilities

### New Starters or Additional Employment

The New Starter Datafile should be completed for all new starters or for staff that have started an additional employment.

We use this new starter information to send the member details of the LGPS and how they can update their nomination details, transfer in other pensions, etc.

If the member has joined through auto-enrolment then this information must be sent to us within 6 weeks of the member joining the LGPS.

### Members who wish to Opt Out

The member can obtain the opt out form from the Pension Fund website. Once your payroll has processed the completed form, please complete the Leaver Datafile and add 'Opted Out' to the notes section, or 'Refunded Through Payroll' if the member opted out within 3 months.

### 50:50 Scheme

As an alternative to opting out of the scheme, a member can choose to move to the 50:50 scheme. A link to the 50:50 Option Form, together with the 50:50 Section Employer Guidance Notes can be found on the Fund Websites (listed on page 5).

### Estimate Request

You should complete form **LG29** if you would like to request estimated figures for an employee for retirements, redundancies, flexible retirements, etc.

You will also need to complete form **LG29** when an employee has requested a retirement estimate or other calculation and Orbis Pension Services need details of the employee's pay at a certain date in order to produce the figures requested.

### End of Year Return

Each year, we send all active members of the LGPS a statement of their benefits.

In order to do this, we require you to complete the end of year return spreadsheet with details of all your members who were paying into the scheme. We will send this spreadsheet to you by March each year.

# Your Responsibilities as a Scheme Employer (cont)

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## Annual Allowance

Each year, we use the end of year data that you supply to estimate if a member has exceeded the annual allowance limit. If we estimate that the member has exceeded or is close to this limit, then we will ask you for pensionable pay figures to 5 April. We use this information to send the member a pension savings statement by the 6 October.

## TUPE

If you have become an employer due to a TUPE transfer, please remember that all eligible staff must be contractually enrolled, including those who are currently opted out of the LGPS, from date of transfer.

If a member wishes to opt out of the scheme, please advise the member to print off an opt out form from the Pension Fund website.

**If you are considering outsourcing any of your services, please contact your Administering Authority as early as possible.**

## Leaver Process

When your scheme members leave their employment before their retirement, you must complete the scheme leaver spreadsheet to inform Orbis Pension Services.

We will send the member a statement of their deferred benefits based upon the information that you provide.

## Updating Contact Details

If any of your contact details change, it is important that you let us know as soon as possible—find email address below.

If you need any further information on these processes or a copy of any of the forms mentioned, please contact:

[Pensions.  
Communications@surreycc.gov  
.uk](mailto:Pensions.Communications@surreycc.gov.uk)

Each Pension Fund has published an administration strategy which sets out the roles and responsibilities for you as a Scheme Employer.

The Strategy document can be found on their Pension Fund website (listed on page 5).

# Training—Current & Future

In the survey, we asked whether there are ‘any areas that you feel you would benefit from some training in order to fulfil your responsibilities?’.

Here are a few of the most common answers:

- Training on the different forms and how to fill them out.
- Clarification on Employer responsibilities.
- Training on the Employer Portal.
- A general refresher course.

## Training currently available

The LGA website has a variety of bite-sized video courses at <http://www.lgpsregs.org/employer-resources/employer-bite-size-training.php> on the following topics:

- What is APP?
- Calculating APP
- APP & Pension Contributions
- APP & the 50/50 Section
- APP & KIT, SPLIT & Stringer Days
- APP for Ill Health & Death Benefits

If you have any comments on this training or would like to request training on a different topic, please email [training.lgps@local.gov.uk](mailto:training.lgps@local.gov.uk)

## Employer Role Training

The employer role workshop is aimed at employers offering the LGPS in England and Wales. You do not need a working knowledge of the LGPS to attend the course; however, some experience of the scheme is preferable.

It is a one-day workshop that is currently being offered virtually using Microsoft Teams. The training will be delivered by an experienced tutor with a maximum of 15 attendees, to allow enough opportunity to engage with the tutor and other attendees.

This course is available to book at: <http://www.lgpsregs.org/employer-resources/other-employer-training.php>

The screenshot shows the top section of the LGPS website. On the left is the LGPS logo with the tagline 'for you, for now, for the future'. To the right of the logo is the text 'Welcome to the website for LGPS employers and pension funds in England and Wales'. Further right is the main heading 'LGPS Regulations and Guidance'. Below this heading is a search bar with the text 'ENHANCED BY Google' and a magnifying glass icon. At the bottom of the header is a horizontal navigation menu with six items: 'Home', 'Scheme regulations', 'Administrator resources', 'Employer resources', 'Bulletins, circulars, minutes', and 'Legal Landscape'. Below the navigation menu is the text 'LGPS employer bite-size training'.

# Helpful Tools, Links & Resources

When we asked whether you, as an Employer, have all the tools and information you need to fulfil your responsibilities as a scheme employer the majority (61%) stated 'Mostly'. 16% stated that they either needed some more resources or that they felt that they had none at all.

A similar result was found when we asked 'Do you know where to get pensions information?'. 24% stated that they either needed some more resources or that they felt that they had none at all.

To help clear up any confusion, we have collated a selection of helpful links and resources that should help you fulfil your responsibilities as an Employer.

## Fund Websites

Every pension fund has its own Pension Fund Website. Up to date LGPS forms and important fund updates can be found here:

Surrey Pension Fund:

<https://www.surreypensionfund.org>

East Sussex Pension Fund:

<https://www.eastsussexpensionfund.org/>

Hammersmith & Fulham Pension Fund:

<https://www.lbhfpensionfund.org/>

Kensington & Chelsea Pension Fund:

<https://www.rbkcpensionfund.org/>

Hillingdon Pension Fund:

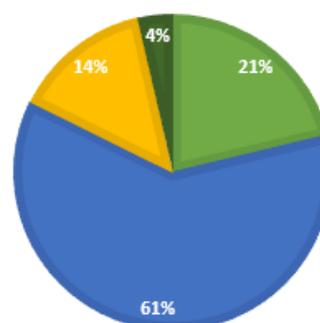
<https://archive.hillingdon.gov.uk/pensions>

Westminster Pension Fund:

<https://www.wccpensionfund.co.uk/westminster-city-council-pension-fund/>

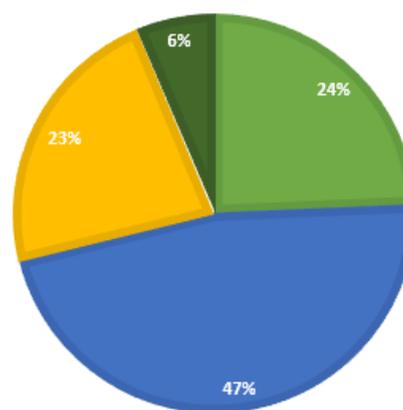
## DO YOU FEEL THAT YOU HAVE ALL THE TOOLS AND INFORMATION YOU NEED TO FULFIL YOUR RESPONSIBILITIES AS A SCHEME EMPLOYER?

■ Yes ■ Mostly ■ Need some more resources ■ Not at all



## DO YOU KNOW WHERE TO GET PENSIONS INFORMATION?

■ Yes - all information ■ Most information ■ Some information ■ No



## LGPS Employer Resources

The Employer Hub of the LGPS Regs website can be found at:

<http://www.lgpsregs.org/employer-resources/index.php>

Here you can find the latest Employer Guides and Documents, up-to-date COVID-19 FAQs as well as bite-size training courses. There's also a link to book onto Employer role training and other worthwhile courses.

## Employer Services Portal

We go more into detail on the portal on page 7.



# The Employer Services Portal

When we asked whether you, as an Employer, use the Employer Pension Portal, 49% of responses stated that you had Never used the portal. 36% of you said that you used the portal only a few times per year.

However, 62% of responses stated that they did not know what information can be gotten from the Employer Pension Portal.

We have updated the Employer Services portal and have added the forms and guides that you may need to complete.

We have produced a guide on how to sign up to and access the Employer Services portal for those who haven't done so already.

If you would like to sign up to the portal, please contact:

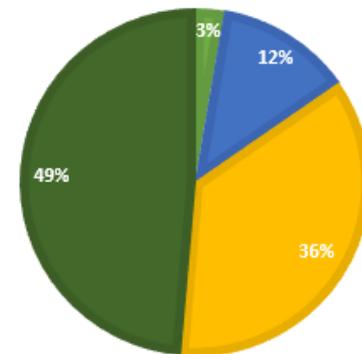
[pensions.communications@surreycc.gov.uk](mailto:pensions.communications@surreycc.gov.uk)

## List of tools currently available on the Employer Pension Portal:

- Look up member details.
- Check the members service history.
  - ◇ Check the members contribution rate.
- Run an estimate of the member's benefits for retirement, flexible retirement, death benefits etc.
  - ◇ Obtain employer and member forms and guides.
  - ◇ Run a redundancy of efficiency retirement - *these are currently unavailable due to the changes from the £95k cap.*

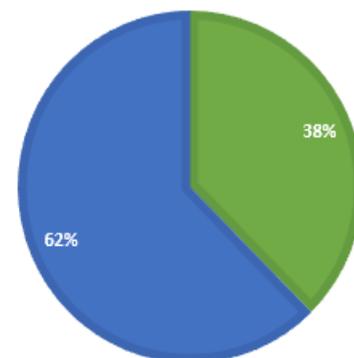
### HOW REGULARLY DO YOU USE THE EMPLOYER PENSION PORTAL?

■ Weekly ■ Monthly ■ A few times per year ■ Never



### DO YOU KNOW WHAT INFORMATION YOU CAN GET FROM THE EMPLOYERS PENSION PORTAL?

■ Yes ■ No



# Orbis Contact Details & Escalation Points

When asked, 56% of responders said that they were unaware of the contact details & escalation points for the Orbis Pensions Admin Team. Please find the most up to date details below:

## Contact Details

-  **0300 200 1031**
-  **[myhelpdeskpensions@surreycc.gov.uk](mailto:myhelpdeskpensions@surreycc.gov.uk)**
-  **Orbis Pension Services**  
**Room 218, County Hall**  
  
**Penrhyn Road**  
  
**Kingston - Upon -Thames**  
  
**KT1 2DN**

## Escalation Points

Initial enquiries		
Member and employer enquiries	Pensions Helpdesk: <a href="mailto:myhelpdeskpensions@surreycc.gov.uk">myhelpdeskpensions@surreycc.gov.uk</a> <b>0300 200 1031</b>	Contact for standard member and employer transaction requests
Queries regarding 'My Pension' Portal	Pensions Helpdesk: <a href="mailto:myhelpdeskpensions@surreycc.gov.uk">myhelpdeskpensions@surreycc.gov.uk</a> <b>0300 200 1034</b>	This phone number contact is just for 'My Pension' Portal queries
Employer enquiries regarding leavers/joiners forms and estimate queries	<a href="mailto:lgps.forms@surreycc.gov">lgps.forms@surreycc.gov</a>	Contact for sending forms and form related requests
Operational team escalation or priority emails		
Escalated and priority member and employer enquiries	Clare Chambers, Pensions Service Delivery Manager: <a href="mailto:clare.chambers@surreycc.gov.uk">clare.chambers@surreycc.gov.uk</a>	Contact for urgent/ escalation cases only. All general enquiries will be forwarded to the Helpdesk if received.
Technical enquiries		
Fund requests	<a href="mailto:Pensions.technical@surreycc.gov.uk">Pensions.technical@surreycc.gov.uk</a>	Contact for report requests and changes to scheme calendar events
Communications support		
Member and employer engagement	<a href="mailto:Pensions.communications@surreycc.gov.uk">Pensions.communications@surreycc.gov.uk</a>	Contact for engagement, training support for members and employers

# Employer Newsletters

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We are pleased to see that the majority of responses stated that they found the Employer Newsletters 'Somewhat useful'.

We hope to improve upon this, so we asked what topics you would like to see in future newsletters. Some reoccurring themes include:

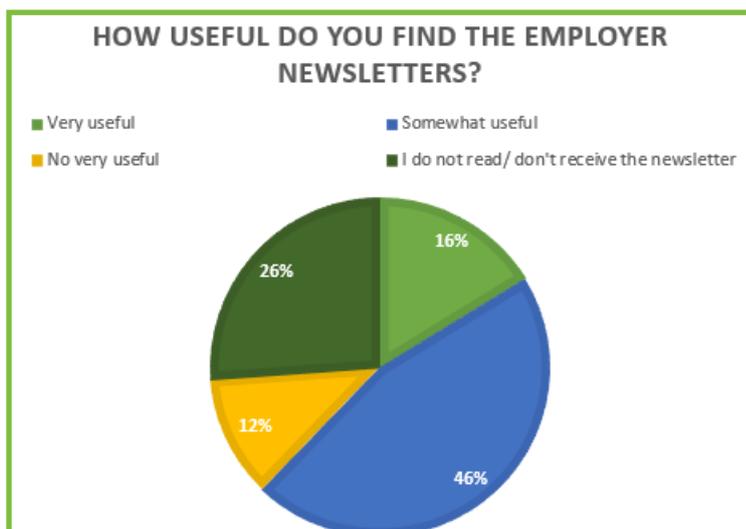
- Articles about how to purchase additional pensions/ AVCS.
- Links to helpful employer guidance and templates.

## How/ where to access the newsletters

We send out Employer newsletters quarterly, emailing them to the Employer email address we currently hold for you.

The next Employer Newsletter was sent out at the same time as this Survey Report.

It is possible that these emails may fall into your Spam folder, so please check regularly.



## Links to Existing Employer Newsletters

[Jan 2020](#)

[Autumn 2020](#)

[Spring 2020](#)

[Winter 2020](#)

[Summer 2020](#)

# Your Feedback & Our Plans for the Future

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Thank you for all your feedback. We have taken it onboard and we will use it to help plan for future updates.

We hope that this report has helped answer some particular questions and reoccurring gaps in knowledge that were highlighted by the survey.

On average, the Employers who answered our survey rated the service that they get from Orbis at 3 stars out of 5.

When asked on how you think we could improve, the reoccurring themes were:

- More training for Employers
- Quicker response needed for enquires
- Better Communication

## Our Plans for the Future

### **Winter Employer Newsletter 2020**

The next Employer Newsletter was attached alongside this report. This was sent out via email to the Employer email address we hold for you.

A link to the newsletter can be found above.

### **End of Year Spreadsheet video**

We will shortly be producing a video guide on how to fill out the 2020 End of Year Spreadsheet. More details to come soon.