

Home > Your Council > Blackpool Council jobs > Local government pension scheme employee discretions

Local government pension scheme employee discretions

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On this page

- [Scope](#)
- [Part A : Mandatory policy statements \(LGPS regulations\)](#)
 - [Power to award additional pension](#)
 - [Power to contribute towards the cost of a member purchasing additional pension](#)
 - [Flexible retirement](#)
 - [Early retirement and waiving actuarial reductions power to award additional membership](#)
 - [Early release of deferred benefits](#)
 - [Early release of deferred benefits with employer consent](#)
- [Part B: Discretionary policy statements \(LGPS regulations\)](#)
 - [Shared cost additional voluntary contributions \(SCAVCs\)](#)
 - [Late transfer requests](#)
 - [Contributions payable by active members assumed pensionable pay](#)
 - [Employee misconduct and recovery of money third tier ill health review](#)
 - [Shared-cost APCs to buy back lost pension](#)
- [Part C: Mandatory policy statements \(Local Government Discretionary and Compensation regulations\)](#)
 - [Redundancy and compensation payments](#)
 - [Redundancy and compensatory added years payments](#)
 - [Injury allowance payments](#)
- [The Role of Corporate Leadership Team](#)
- [The employees role in the process](#)
- [Applications on compassionate grounds](#)
- [Declaration](#)
- [Internal dispute resolution procedure](#)
- [Useful information and sources of help](#)
- [Monitoring and evaluation](#)
- [Appendix 1](#)

Scope

This policy confirms Blackpool Council's decisions in relation to exercise of its discretionary powers under the regulations of the Local Government Pension Scheme (LGPS).

Employer discretions

Part A - Mandatory policy - Formulation of policy in accordance with:

Regulation 60 of the Local Government Pension Scheme (LGPS) regulations 2013

Paragraph 2 (2) of Schedule " to the LGPS (Transitional Provisions, Savings & Amendment) regulations 2014

[Regulation 66 of the Local Government Pension Scheme \(Administration\) Regulations 2008](#)

Regulation 106 of the Local Government Pension Scheme regulations 1997

Power of Scheme employer to award additional pension

(Regulation 31 of the LGPS Regulations 2013)

An employer can grant extra annual pension of up to a maximum £6,500 (figure at 1 April 2014) to an active Scheme member or within 6 months of leaving to a member whose employment was terminated on the grounds of redundancy or business efficiency. This maximum figure that can be initially awarded will be index linked and the level increased on the 1st April each year.

Employer's policy:

Additional pension will not be awarded under any circumstance.

Power of Scheme employer to contribute towards the cost of a member purchasing additional pension

(Regulation 16 (2) (e) and 16 (4) (e) of the LGPS Regulations 2013)

Where an active Scheme member wishes to purchase extra annual pension of up to £6,500 (figure at 1 April 2014) by making Additional Pension Contributions (APCs), the employer may voluntarily contribute towards the cost of purchasing that extra pension via a Shared Cost Additional Pension Contribution (SAPCs). This maximum figure that can be initially purchased will be index linked and the level increased on the 1st April each year.

Employer's policy:

A SCAPC will only be entered into when the member decides to that they wish to make an APC in order to repay the loss of pension which they have suffered from the purchase of unpaid leave relating to the changes to Terms & Conditions process 2014-16.

As long as the member enters into the APC contract by the 31st March of the leave year in which they wish to repay the loss of pension (i.e. 31st March 2015 for the unpaid leave purchased in 2014-15) then Blackpool Council shall share the cost of repayment; employee 1/3 , employer 2/3 . Further information on how to do this is available on the Hub.

All other APC contracts will be funded in full by the member.

Flexible retirement

(Regulation 30 (6) and (8) of the LGPS Regulations 2013, Regulations 3 (5), 11(2) and 11(3) of the LGPS (Transitional Provisions, Savings and Amendment) Regulations 2014 and regulation 18(3) of the LGPS (Benefits, Membership and Contributions) Regulations 2007)

The Local Government Pension Scheme allows scheme members who have attained the age of 55 to draw all or part of their retirement benefits under flexible retirement arrangements even though they have not retired providing that:

- The employer consents, and
- There has been a reduction in hours or a reduction in grade

Specifically where the employer consents to flexible retirement then, in addition to the benefits the member has accrued prior to 1 April 2008 (which the member must draw), the employer can also allow the member to choose to draw all, part or none of the pension benefits they accrued after 31 March 2008.

However, benefits taken on flexible retirement will be subject to a potential actuarial reduction if they are being drawn earlier than the members normal retirement age (flexible retirement provisions may be operated for members potentially up to 2 days before a members 75th birthday), the reductions applied will be in accordance with guidance issued by the government actuary. Employers can if they choose waive any reductions that might apply.

Employer's policy

An employee who reaches the age of 55 can request to draw their retirement benefits under the flexible retirement arrangements even though they have not left employment, all cases require approval by the Early Retirement Panel. Any request to waive actuarial reductions will be considered on an individual basis, and decisions made on the specific merits of each case. Should a manager support a request to waive actuarial reductions then the case must be put forward to Corporate Leadership Team for consideration.

Due to the complexity in the level of protected benefits that now apply to different members, establishing what level of benefits can be waived can be difficult. Appendix 1 lists the options available to employers in terms of the level of reductions that can be waived and

the grounds under which they may be waived.

Requests for flexible retirement will only be considered if:

1. There is a permanent reduction of hours/grade equivalent to a minimum 50% reduction in gross salary or pay
2. The request is accompanied by any associated costs which should not be excessive or unreasonable
3. That discretion should be subject to a business case showing that there will be no adverse impact on Council service as a result of the flexible retirement proposal.
4. The employee is aware that if they rejoin the LGPS scheme they will not be able to claim their pension benefits again. Following any further reduction in their hours, any further pension benefits that are accrued would become payable upon leaving employment

Early retirement and waiving actuarial reductions

(Schedule 2 paragraphs 1(2), 2(1), 2(2) and Regulation 3 (1) of the LGPS (Transitional Provisions, Savings and Amendment) Regulations 2014, Regulation 30(8) of the LGPS Regulations 2013 and regulation 30(5) and 30A(5) of the LGPS (Benefits, Membership and Contributions) Regulations 2007)

Where a member age 55 or over leaves local government employment before he is entitled to the immediate payment of retirement benefits, (or having attained age 55 and have previously been awarded deferred benefits) he can request to receive payment of them immediately.

Employers can if they choose waive, in whole or in part, any reductions that might apply and the employer must pay to the Pension Fund a sum representing the capital cost of waiving those reductions. Likewise Employers can also choose to "switch on" the 85 Year Rule for members voluntarily choosing to draw benefits between the ages of 55 & 60.

Due to the complexity in the level of protected benefits that now apply to different members, establishing what level of benefits can be waived can be difficult. Appendix 1 lists the options available to employers in terms of the level of reductions that can be waived and the grounds under which they may be waived.

An employer may determine on compassionate grounds that his retirement pension should not be reduced.

Employer's policy

Under the LGPS 2014, employees aged between 55 and 59 will no longer need their employer's permission to retire and receive immediate payment of their pension benefits. However, the pension benefits will be subject to an actuarial reduction to allow for early payment.

Should the member feel that there are exceptional circumstances that merit the waiving of the reductions by "switching on" the 85 Year Rule or in waiving the reductions due to compassionate grounds, for example, or reasons not covered by other regulations and policies they can apply for the actuarial reductions to be waived.

Each application will be consider on it own basis and merits.

Such applications will only be considered where there are exceptional reasons for doing so and any associated pension costs will need approval by a sub group of the Corporate Leadership Team.

The request to waive actuarial reductions can only be made once and any resubmitted requests will not be considered unless there are clear demonstrable grounds for doing so.

Part A2 - Discretions in relation to scheme members who ceased active membership on or after 1 April 2008 and before 1 April 2014 (excluding councillor members)

Power of scheme employer to award additional membership

(Regulation 3 (10) of the LGPS (Transitional Provisions, Savings and Amendment) Regulations 2014 and regulation 12 of the LGPS (Benefits, Membership and Contributions) Regulations 2007)

An employer can within 6 months of the date of termination grant extra membership in the pension scheme to a Scheme member whose employment was terminated before 1 April 2014 on the grounds of redundancy or business efficiency. Note that this is a time limited discretion which expires on 30 September 2014 for those whose employment is terminated on 31 March 2014.

Employer's policy

Additional pension will not be awarded under any circumstance.

Early release of deferred benefits

(Regulations 30(2), (5), 30A(3) and (5) of the LGPS (Benefits, Membership and Contributions) Regulations 2007) and reg.3(5A)(c), para.1(1)(aa) and para.2(1) of sch.2 of the LGPS (Transitional Provisions, Savings and Amendment) Regulations 2014)

Prior to 14 May 2018, members who left the scheme between 1 April 2008 and 31 March 2014 with deferred benefits (or suspended tier 3 benefits) who made an application to release benefits on or after age 55 and before age 60 required the former employer's consent. From 14 May 2018, this is no longer the case.

A policy decision is required, however, to determine

1. Where a member voluntarily draws benefits between the age of 55 and 60 who has then satisfied the 'Rule of 85' or will do so before their 60th birthday, the actuarial reductions will be calculated pretending that the member had instead satisfied the 'Rule of 85' on their 60th birthday. The employer has discretion to require the actual date upon which the member satisfied (or would have satisfied) the 'Rule of 85' to be used. This will have the effect of reducing the actuarial reduction. Should an employer exercise this discretion, the employer must pay to the fund a pension strain payment.
2. Whether, to waive on compassionate grounds any actuarial reduction that would normally be applied to deferred benefits which are paid before age 65. Should an employer exercise this discretion, the employer must pay to the fund a pension strain payment.

Employer's policy

Any written requests received, requesting the utilisation of either discretion above, will be considered on an individual basis and supporting evidence will be required that the case is one of compassion if it is so claimed.

Such applications will only be considered where there are exceptional reasons for doing so and any associated pension strain (costs) will need approval by Corporate Leadership Team.

Part A3 - Discretions in relation to scheme members who ceased active membership on or after 1 April 1998 and before 1 April 2008 and active councillor members and councillor members who ceased active membership on or after 1 April 1998

Early release of deferred benefits with employer consent

(Regulations 31(2) (5) and (7) of the LGPS Regulations 1997)

Members who left the scheme after 1 April 1998 but before 1 April 2008 with deferred benefits and councillor Members who left after 1 April 1998 may apply to receive immediate payment of their deferred benefits on or after age 50* and before age 60. Both of these categories of member are still subject to the 1997 regulations and as such a separate policy statement is required under those scheme rules.

In addition a further policy decision is required to determine whether, on compassionate grounds, to waive any actuarial reduction that would normally be applied to deferred benefits which are paid before age 65.

A further policy decision under the 1997 regulations is required in respect of councillor Members in that if they continue to be employed by an employer but attain age 65, the councillor member can opt to take their benefits whilst continuing in the same employment if the employer consents to this.

Employer's policy

Any requests for preserved benefits to be released early will be considered on an individual basis and evidence will be required that the case is one of compassion. Any associated pension costs will need approval by Corporate Leadership Team.

A request from a councillor member to have their benefits paid on or after their 65th birthday whilst remaining elected will not be allowed, pension benefits will only be released once they are no longer in office.

Part A4 - Discretions in relation to scheme members who ceased active membership before 1 April 1998

Early release of deferred benefits with employer consent

(Regulation D11(2) (c) of the LGPS Regulations 1995)

A policy decision concerning early release of benefits needs to be made in relation to active members who have left the scheme before 1 April 1998 who make an application on compassionate grounds to release benefits on or after age 50* and before age 60. Under these rules the sole discretion for an employing authority is that they may determine on compassionate grounds that benefits are to become payable on an unreduced basis.

Employer's policy

Any requests for preserved benefits to be released early will be considered on an individual basis and evidence will be required that the case is one of compassion. Any associated pension costs will need approval by Corporate Leadership Team.

*It should be noted that benefits paid on or after age 50 and before age 55 would be subject to an unauthorised payments charge under the Finance Act 2004 and, where applicable, an unauthorised payments surcharge under that Act, and a Scheme sanction charge on any benefits built up after 5 April 2006.

Part B - Formulation of policy in accordance with further discretions under the Local Government Pension Scheme Regulations 2013

Shared cost additional voluntary contributions (SCAVCs)

(Regulation 17 of the LGPS Regulations 2013, Regulations 15(1)(d) of the LGPS (Transitional Provisions, Savings and Amendment) Regulations 2014, Regulation 25(3) of the LGPS (Administration) Regulations 2008 and Regulation 15(3) of the LGPS (Benefits, Membership and Contributions) Regulations 2007)

An active member may elect to pay AVCs into a scheme established under contract between his appropriate administering authority and a body approved for the purposes of the Finance Act 2004.

Under paragraph 3 of this regulation an employer can, at its discretion contribute to the AVC scheme and where they do the AVC scheme is known as a shared cost additional voluntary contributions arrangement and contributions to it as SCAVCs.

Employer's policy

the authority will enter into a SCAVC arrangement and pay SCAVC contributions where an employee has elected to pay AVCs by salary sacrifice. The amount of these employer SCAVC contributions will not exceed the amount of salary sacrificed by the employee. This is a Council discretion which is subject to the employee meeting the authority's conditions for acceptance into the salary sacrifice shared cost AVC scheme and may be withdrawn or changed at any time. This is known as a Salary Sacrifice Shared Cost Additional Voluntary Contribution (SSCAVC).

Late transfer requests

(Regulation 100(6) and 22(7) and (8) of the LGPS Regulations 2013)

The Local Government Pension Scheme Regulations allow for the acceptance of transfer value payments into the fund (subject to the Pension Fund administering authorities approval) to enable members to transfer pension rights accrued prior to joining the scheme into the LGPS, and thereby count additional pension. This election should be made within 12 months of first joining the LGPS in the employment.

The discretion allowed under regulation 100(6) relates to the acceptance of transfers relating to non LGPS membership, where the member makes a request after the expiry of the first 12 months of joining the LGPS.

Previous LGPS rights are automatically aggregated unless an election to keep those accrued benefits separate is received. Regulations 22 (7) and (8) allow an employer to extend the 12 month time limit within which a Scheme member who has a deferred LGPS benefit in England or Wales following the cessation of employment (or cessation of a concurrent employment) to elect not to have the deferred benefits aggregated with their new LGPS employment (or on-going concurrent LGPS employment) if the member has not made an election to retain separate benefits within 12 months of commencing membership of the LGPS in the new employment (or within 12 months of ceasing the concurrent membership).

Employer's policy

Requests made outside of the 12 month period will not be considered unless

- No previous option was given to the member due to a clear administration error (e.g. service declared but the transfer quotation had never been requested)
- Where there has been an administrative delay in processing the initial request which was received within the initial 12 months of active membership
- There is clear evidence that they had not been informed of, or could not reasonably have known of the time limit

Any request to extend the deadline based on one of the above reasons is delegated to Corporate Leadership Team.

Contributions payable by active members

(Regulation 9 and 10 of the LGPS Regulations 2013)

An active member shall make contributions to the Scheme at the contribution rate from his pensionable pay in each employment in which he is an active member. The contribution rate to be applied to his pensionable pay in any financial year is the rate determined by the employer with reference to the tiered contribution pay bands stated in the regulations.

Where there is a material change to a member's pensionable pay in the course of a financial year, the employer may re-determine the contribution rate to be applied.

Employer's policy

the authority determines individual employee contribution rate for the forthcoming financial year each April. This is done according to the employees actual pensionable pay. If the employee believes that they their contribution rate is incorrect they should state this in writing to payroll.services@blackpool.gov.uk within 30 days of being notified of the new rate.

Should an employee have a change in salary during the year then the authority will not amend the contribution rate until the following April when the exercise is carried out for all members. However, an employee is subject to a significant salary change they can elect in writing that their contribution rate be reassessed.

Assumed Pensionable Pay (APP)

(Regulation 21(4) and (5) of the LGPS Regulations 2013)

1. Whether or not, when calculating assumed pensionable pay when a member:
 - Is on reduced contractual pay or no pay on due to sickness or injury, or
 - Is absent during ordinary maternity, paternity or adoption leave or during paid additional maternity, paternity or adoption leave, or
 - Is absent on reserve forces service leave, or
 - Retires with a Tier 1 or Tier 2 ill health pension, or dies in service

to include in the calculation the amount of any 'regular lump sum payment' received by the member in the 12 months preceding the date the absence began or the ill health retirement or death occurred. A 'regular lump sum payment' is a payment for which the member's employer determines there is a reasonable expectation that such a payment would be paid on a regular basis.

2. Where the pensionable pay received in the relevant 3 month period or, as the case may be, 12 week period, was, in the opinion of the employer, materially lower than the level of pensionable pay that the member normally receives, the employer has discretion to replace the actual pensionable pay received with a higher level of pensionable pay to reflect the level of pensionable pay that the member would normally have received. An employer must have regard to the level of pensionable pay received in the previous 12 months when working out what level of pensionable pay the member normally receives.

Employer's policy

1. the authority will include in the APP calculation any 'regular lump sum payments' where it is judged that it is reasonable to assume that they would have continued to have been paid.
2. When it is reasonably assumed that the pensionable pay received by the member in the 12 months prior to their absence, was materially lower than the normal level of pensionable pay, the authority reserves the right to replace the actual pensionable pay received with a higher amount in order to calculate an APP which more accurately reflects the member's expected level of pensionable pay.

Employee misconduct and recovery of money

(Regulation 74)

The Scheme rules allow an employer to recover financial loss from member's pension benefit when:

- employment has been terminated because of an offence involving fraud or grave misconduct; and
- the former employer has suffered direct financial loss as a consequence.

Employer's policy

the authority will seek maximum financial recompense wherever possible where an employee's contract has been terminated because of an offence involving fraud or grave misconduct.

Third tier ill health review

(Regulation 20)

Scheme members who have been awarded Third Tier Ill Health retirement will have a review after 18 months to determine if the member has found "gainful employment" since retirement. After 18 months their pension benefits are suspended pending a review of employment status and/or current medical condition. If "gainful employment" has been found then the employer is permitted to seek repayment of the pension benefits paid since the date employment commenced.

Employer's policy

If the employment and/or medical review is not completed at the 18 month stage then the authority will request that pension payments be suspended after 18 months pending the completion of the review. If the employee has not found gainful employment & still meets the medical criteria then pension benefits will resume, backdated to the date of suspension, until the end of the three years.

If it is found that the member has found "gainful employment" within the initial 18 months then the authority will seek repayment of the pension benefits paid from the date they commenced in "gainful employment" to the date that their pension was suspended.

Shared-cost APCs to buy back lost pension

(Regulation 16 (16) of the LGPS Regulations 2013)

Members on the following types of leave which are not covered by APP are able to enter into an APC contract to buy back the lost CARE pension. If they make the election within 30 days of returning to work, in this instance the employer must fund two-thirds of the cost.

- Additional maternity leave during which no pensionable pay is received
- Additional adoption leave during which no pensionable pay is received
- Shared parental leave during which no pensionable pay is received
- Authorised unpaid leave (excluding strike leave)

The employer has discretion to extend the 30 day deadline.

If the individual leave period lasted longer than 36 months, the employer is only required to share the cost in relation to the first 36 months of the leave.

Employer's policy

The 30 day deadline will only be extended where due to an administrative error the member was not offered the option to buy back the lost pension; in that instance the 30 day limit will start from the date that the letter is issued.

Part C - Mandatory policy statement - Formulation of policy in accordance with

Regulation 7 of the Local Government (Early Termination of Employment) (Discretionary Compensation) (England and Wales) Regulations 2006

Regulation 26 of the Local Government (Early Termination of Employment) (Discretionary Compensation) (England and Wales) Regulations 2000

Regulation 14 of the Local Government (Discretionary Payments) (Injury Allowances) Regulations 2011

PART C1 - Discretions in relation to the Local Government (Early Termination of Employment) (Discretionary Compensation) (England and Wales) Regulations 2006

Redundancy and compensation payments

(Regulation 5 and 6 of the Local Government (Early Termination of Employment) (Discretionary Compensation) (England and Wales) Regulations 2006)

These regulations provide a discretionary power to award a one-off lump sum payment of up to 2 years pay (104 weeks), inclusive of any redundancy payment made. This applies to any member who terminates their employment on the grounds of redundancy, efficiency or in the case of a joint appointment (not job shares) where termination arises because the other holder of the joint appointment has left it.

The provisions apply to all employees who are eligible for participation in the LGPS, whether or not they are current members of the scheme. There is also a discretionary power to waive the weekly pay ceiling placed on statutory redundancy payments and to calculate, instead, on pay up to the actual week's pay.

Employer's policy

the authority's policy on redundancy payments is specified in the Redundancy Procedure and there will be no further enhancement as permitted under this regulation.

Part C2 - Discretions in relation to the Local Government (Early Termination of Employment) (Discretionary Compensation) (England and Wales) Regulations 2000

Redundancy and compensatory added years payments

(Regulation 17,19,21 and 25 of the Local Government (Early Termination of Employment) (Discretionary Compensation) (England and Wales) Regulations 2000)

Prior to the 2006 discretionary regulations employers could award additional service following a redundancy or efficiency retirement where that employee was over age 50. Although this facility is no longer available to current active employees, there are still discretionary decisions to be made in respect of employees who are already in receipt of additional service. These include:

- How to apportion any surviving spouse's annual Compensatory Added Years (CAY) payment where the deceased person is survived by more than one spouse
- How the annual added years will be apportioned amongst any eligible children
- Whether, in respect of the spouse of a person who ceased employment before 1 April 1998 and where the spouse or civil partner remarries, enters into a new civil partnership or cohabits after 1 April 1998, the normal pension suspension rules should be ignored
- Whether and to what extent to reduce or suspend the member's annual compensatory added years payment during any period of re-employment in local government and how to reduce the member's annual compensatory added years payment following the cessation of a period of re-employment in local government

Employer's policy

- Where a deceased former employee is survived by more than one spouse the annual CAY pension will be apportioned equally between eligible spouses.
- Where a deceased former employee is survived by at least one eligible child then the children's CAY pension will be paid in the same proportion as under the main pension scheme regulations.
- Where the spouse of a person (who ceased employment before 1 April 1998) remarries or cohabits after 1 April 1998, the spouse's annual CAY pension will cease to be paid. Should that marriage or cohabiting end, the person may apply to the Council for the compensation to be reinstated.
- Where a person dies in a second employment where they were a LGPS member, the Council will apply the appropriate abatement, as prescribed by the LG (Discretionary Payments) regulations 1996, to the long term spouse's CAY pension but not the short term CAY pension.

Part C3 - Discretions in relation to the Local Government (Discretionary Payments) (Injury Allowances) Regulations 2011

Injury Allowance payments

(Regulations 3 to 7 of the Local Government (Discretionary Compensation) (Injury Allowances) Regulations 2011)

The regulations clarify that Injury Allowance Schemes can apply to any employer eligible to participate within the Local Government Pension Scheme (LGPS) and who is listed in the schedule contained within the LGPS (Administration) Regulations 2008. Any eligible employer is required to publish, and keep under review, a written policy statement detailing the provisions of any discretionary Injury Allowance Scheme in place.

the authority has decided not to adopt an injury allowance scheme

The role of corporate leadership team

All requests for early retirement and voluntary redundancy need approval in line with the criteria within this policy.

CLT will take into account the following:

- The operational implications of the retirements or redundancy on the directorate /service
- The service benefits of the early retirement
- The needs of the individual concerned [compassionate reasons will be considered]
- The cost to the service (including any potential cost of recruitment and training);
- The ability to re-organise work amongst existing staff
- The ability to recruit suitable new/additional staff
- The overall impact on quality of service
- The overall impact on performance
- Planned structural changes
- Ensure that there is a fair and consistent approach to the approval of requests across the council

The employees role in the process

All requests under this policy must be made in the first instance in writing to their manager who will then liaise with HR over the approval process. The application should include an explanation of what impact, if any, the employee believes agreeing to the request will have on the service and how, in the employee's opinion, any such impact might be accommodated. For applications of flexible retirement the employee must also specify either the revised contractual salary or working hours.

Each request will be considered on an individual basis, and decisions made on the specific merits of each case. There will be no automatic consent.

Where a pension becomes payable as a result of redundancy (compulsory or voluntary) detailed information regarding the qualification & calculation of redundancy pay can be found in Blackpool's policy on Redundancy and Retirement Procedure. Any employee who is being made redundant will receive information regarding bringing the payment of pension benefits once it has been approved.

Applications on compassionate grounds

Compassionate grounds can cover a variety of situations and a written application outlining the case should be submitted the employing manager. Evidence is expected to be submitted supporting the application & the authority reserves the right to seek additional information or evidence should it feel necessary. Any application for actuarial reductions in benefits could be waived based on the individual's circumstances.

Declaration

It is understood that the above discretions are applicable to all eligible members of the Scheme. A copy of the scheme employer's policy decisions should be sent to Your Pension Service within one month of the date the policy is revised.

Any change to the discretions exercised under the LGPS Regulations can take immediate effect from the date the Scheme employer agrees the change.

Any change to the discretions exercised under the Discretionary Compensation Regulations 2000, the Discretionary Compensation Regulations 2006 or the Injury Allowances Regulations 2011 cannot take effect until one month after the date the Scheme employer publishes a statement of its amended policy.

The policies made above:

1. Must have regard to the extent to which the exercise of the discretions could lead to a serious loss of confidence in the public service
2. Will not be used for any ulterior motive
3. Will be exercised reasonably

4. Will only be used when there is a real and substantial future benefit to the employer for incurring the extra costs that may arise
5. Will be duly recorded when applied

Internal dispute resolution procedure

Any complaints relating to a decision made by Blackpool Council as an Employer within the LGPS should be initially raised under the pension scheme's internal disputes resolution procedure.

Useful information and sources of help

Internal contacts

Contact	Telephone
Pensions team	01253 478578 or 01253 478579
Employee relations team - HR	01253 477232 or 01253 477233
Occupational health	01253 478241
GMB	01772 555879
Unison branch office	01253 478492
Unite T & G	01253 476310

LGPS Administrators

[LPP - Your Pension Service](#)

PO Box 1381
Preston
PR2 0WP

Pensions Helpdesk
0300 323 0260

Monitoring and evaluation

The effectiveness of this policy will be measured actively by completing regular monitoring, assessment and evaluation, and through observation and feedback, to ensure that we consistently operate as an Employer in the LGPS appropriately and sensitively.

Human Resources will review this guidance annually or following significant changes, challenges and/or individual and team demands.

Appendix 1 - if voluntarily retiring

If there is an actuarial reduction regarding the particular tranche of membership, the employer has the right to -

Part	Group 1	Group 2	Group 3	Group 4
A	Waive all or none on compassionate grounds.	Waive all or none on compassionate grounds	Waive all or none on compassionate grounds.	Waive all or none on compassionate grounds.
B1	Waive all or none on compassionate grounds.	Waive all or none on compassionate grounds.	Waive all or none on compassionate grounds.	Waive all or none on this on compassionate grounds.

B2	Waive all or none on compassionate grounds.	Waive all or none on compassionate grounds.	Waive all, some or none on any grounds.	Waive all, some or none on any grounds.
C	Waive all, some or none on any grounds.	Waive all or none on compassionate grounds.	Waive all, some or none on any grounds.	Waive all, some or none on any grounds.
D1	Waive all, some or none on any grounds.	Waive all, some or none on any grounds.	Waive all, some or none on any grounds.	Waive all, some or none on any grounds.

Part A = membership to 31 March 2008

Part B1= membership 1 April 2008 to 31 March 2014

Part B2 = membership 1 April 2014 to 31 March 2016

Part C = membership 1 April 2016 to 31 March 2020

Part D1 = membership 1 April 2020 onwards

Group 1 member = a member who was an active member prior to 1 October 2006 and who was born on 31 March 1956 or earlier

Group 2 member = a member who was an active member prior to 1 October 2006, was born between 1 April 1956 and 31 March 1960 inclusive, and who would reach their CRA by 31 March 2020

Group 3 member = a member who was an active member prior to 1 October 2006 and who is not a Group 1 or Group 2 member

Group 4 member = a member who was not a member prior to 1 October 2006.

If member retires on flexible retirement, the employer may waive all, some or none of any reduction on any grounds.

[↑ Back to top](#)

Blackpool Council

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