

ITEM NO: 17(a)

Report To: Pension Fund Management Panel

Date: 10 September 2010

Reporting Officer: Peter Morris, Executive Director of Pensions

Subject: **DELEGATION SCHEME – PENSION BENEFITS AND CONTRIBUTIONS – REPORT FOR THE PERIOD 1 APRIL 2009 TO 31 MARCH 2010**

Report Summary: The report informs members of the Scheme of Delegation to Officers Relating to Pension Benefits and Contributions and what action has been taken by the Executive Director of Pensions under them during 2009 – 2010.

Recommendation: It is recommended that the Panel note the report.

**Financial Implications:
(Authorised by the Borough Treasurer)** There are no direct financial implications arising from this report.

**Legal Implications:
(Authorised by the Borough Solicitor)** This report details the actions taken by the “Pensions Office” in accordance with the LGPS regulations and the Council’s Scheme of Delegation.

Risk Management: The LGPS needs to be effectively and efficiently administered. The scale of the Fund necessitates the delegation of the administrative role. The role of managers is to ensure effective processes and internal control. This is also subject to external review by internal and external audit.

ACCESS TO INFORMATION: **NON-CONFIDENTIAL**

This report does not contain information which warrants its consideration in the absence of the Press or members of the public.

Background Papers: The Local Government Pension Scheme (Administration) Regulations 2008.

Benefit Regulations refer to the Local Government Pension Scheme (Benefits, Membership and Contributions) Regulations 2007.

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1. INTRODUCTION

- 1.1 This report presents an updated version of Part A (Benefits and Contributions) of the Greater Manchester Pension Fund Scheme of Delegation to Officers document. The report also contains a summary of the action taken under the Scheme in respect of pension benefits and contributions for the period 1 April 2009 to 31 March 2010.

2. SCHEME OF DELEGATION TO OFFICERS

- 2.1 In April 2008 the Local Government Pension Scheme (Administration) Regulations 2008, and the Local Government Pension Scheme (Benefits, Membership and Contributions) Regulations 2007 replaced the Local Government Pension Scheme 1997 regulations. This has necessitated some minor amendments to the Scheme of Delegation to officers, to replace references to the old regulations with those of the new and to delete items that are no longer relevant.

GREATER MANCHESTER PENSION FUND

SCHEME OF DELEGATION TO OFFICERS

- 2.2 All references below to Administration Regulations refer to the Local Government Pension Scheme (Administration) Regulations 2008, references to the Benefit Regulations refer to the Local Government Pension Scheme (Benefits, Membership and Contributions) Regulations 2007. References to other regulations are as stated.
- 2.3 The following functions are delegated pursuant to Section 101 of the Local Government Act 1972 as designated below:-

EXECUTIVE DIRECTOR OF PENSIONS

2.4 Administrative Matters

To deal with the following benefits and contributions matters in relation to the Greater Manchester Pension Fund.

- (i) In consultation with the Chief Executive, the making of admission agreements with bodies falling within the scope of Administration Regulations 5 and 6.
- (ii) The determination under Benefit Regulation 3 of the intervals at which standard employee contributions are payable to the pension scheme.
- (iii) The exercise of discretion under Benefit Regulation 23, 32, 35 regarding the payment of death grants in respect of deceased scheme Members in accordance with the guidelines approved by the Pension Fund Management Panel.
- (iv) The exercise of discretion under Benefit Regulation 26 in respect of breaks in education or training for the purposes of deciding if a person can be regarded as a child.
- (v) The exercise of discretion under Benefit Regulation 27 in the payment of the whole or part of a children's pension to a person other than an eligible child.

- (vi) The commutation of certain small Pension benefits within the limits specified in Benefit Regulation 39 to single lump sum payments so as to discharge future liability for payments.
- (vii) The agreement with employing authorities of the cost of awarding additional membership under Administration Regulation 40.
- (viii) The agreement with employing authorities of the cost of the awarding additional pension under Administration Regulation 40.
- (ix) The determination under Administration Regulation 23 of whether or not a person wishing to purchase certain additional pension benefits has undergone a medical examination to the satisfaction of the administering authority.
- (x) Obtaining revisions to a rates and adjustments certificate in circumstances falling within Administration Regulation 38 (5).
- (xi) The determination under Administration Regulation 42 of intervals for the payment of employee and employer pension contributions to the Fund.
- (xii) Charging interest under Administration Regulation 44 to employers or other administering authorities on late payments due to the Fund.
- (xiii) The determination under Administration Regulation 55(4) of the amount of any benefit that may be payable to a person out of the Pension Fund.
- (xiv) The determination, under Administration Regulation 55(2) of various matters in relation to new contributors and what previous service may be taken into account.
- (xv) The approval under Administration Regulation 56(2) of medical practitioners to be used by Fund employers in making decisions on entitlement to ill-health retirement.
- (xvi) Deciding disagreements raised under Administration Regulation 58 and 60 (i.e. under Internal Dispute Resolution Procedure) in respect of administering authority matters.
- (xvii) The payment of transfer values under Administration Regulations 79, 81 and 86.
- (xviii) The acceptance of transfer values under Administration Regulations 83 and 86.
- (xix) The approval of applications for the reinstatement of spouse's pensions under Regulation F7 of the Local Government Pension Scheme Regulations 1995 (as amended) in the following circumstances:-
 - (a) if a spouse has remarried and that marriage has ended; or
 - (b) if a spouse has been cohabiting outside marriage and that cohabitation has ended.
- (xx) The exercise of discretion on the extension of statutory time limits in respect of various applications made by employees and beneficiaries as provided in the regulations.
- (xxi) The waiving on compassionate grounds of overpayments of pension benefits.
- (xxii) The making and revision of a Pension Administration Strategy under Administration Regulation 65.

3. BENEFITS AND CONTRIBUTIONS

3.1 Details of the number of cases dealt with by the Pensions Office under the Scheme during the period 1 April 2009 to 31 March 2010 are shown in the table below.

		No of Cases
(i)	New Admission Agreements	15
(ii)	Determination of intervals for all employee and employer contributions	-
(iii)	Payment of Death Grants	478
(iv)	Disregard of breaks in education (Childs Pension)	9
(v)	Paying Childs Pension to person other than eligible child	21
(vi)	Commutation of Small Pensions	-
(vii)	Agreeing cost of additional membership	66
(viii)	Agreeing cost of the award of additional pension	-
(ix)	Medical checks for purchase of additional benefits	54
(x)	Obtaining revisions to a rates and adjustments certificate	-
(xi)	Determination of intervals for all employee and employer contributions payments	-
(xii)	Interest on late contributions from employers or other administering authorities	-
(xiii)	Determination of amounts of benefits	16,089
(xiv)	Determination of matters relating to new contributors	12,467
(xv)	Approval of medical practitioners	64
(xvi)	Decisions under the Internal Dispute Resolution Procedure	43
(xvii)	Payment of transfer values	798
(xviii)	Acceptance of transfer values	531
(xix)	Re-instatement of spouses pension	2
(xx)	Extension of time limits	-
(xxi)	Waiving of overpaid pensions on compassionate grounds	4
(xxii)	Revision of the Pension Administration Strategy	-

4. NEW ADMITTED BODIES

4.1 Admission agreements completed during the period 1 April 2009 to 31 March 2010. The bodies concerned and their respective guarantors are shown in the table below.

NAME OF BODY	TYPE OF ADMISSION BODY	DATE OF AGREEMENT	GUARANTOR	ACTUARIAL POOL
GREATER MANCHESTER WASTE LIMITED – NOW KNOWN AS VIRIDOR WASTE (GREATER MANCHESTER) LIMITED	TRANSFEEEE	2009.04.08	NONE – £3M BOND IN PLACE, PLUS GMWDA HAS UNDERLYING GUARANTOR ROLE AS SCHEME EMPLOYER	NOT POOLED WITH A CURRENT EMPLOYER
TAYLOR SHAW LIMITED (ST AUGUSTINE'S)	TRANSFEEEE	2009.04.27	OLDHAM MBC	OLDHAM MBC
MELLORS CATERING SERVICES LIMITED	TRANSFEEEE	2009.05.21	BOLTON MBC	BOLTON MBC
ALLIED PUBLICITY SERVICES (MANCHESTER) LIMITED	TRANSFEEEE	2009.06.02	OLDHAM MBC	OLDHAM MBC
GROUNDWORK MANCHESTER SALFORD STOCKPORT TAMESIDE AND TRAFFORD	COMMUNITY	2009.06.25	MANCHESTER CITY COUNCIL	SMALL ADMITTED BODIES
BURY GYMNASTICS CLUB LIMITED	TRANSFEEEE	2009.08.03	BURY MBC	BURY MBC
INDIVIDUAL SOLUTIONS SK LIMITED	TRANSFEEEE	2009.08.05	STOCKPORT MBC	STOCKPORT MBC
CARE QUALITY COMMISSION	COMMUNITY	2009.10.02	NONE – ADMISSION AGREED BY PANEL 6 MARCH 2009	NOT POOLED WITH A CURRENT EMPLOYER
GROUNDWORK MANCHESTER SALFORD STOCKPORT TAMESIDE AND TRAFFORD	COMMUNITY	2009.11.13	TAMESIDE MBC	SMALL ADMITTED BODIES
LEIGH SPORTS VILLAGE LIMITED	COMMUNITY	2009.12.14	WIGAN MBC	WIGAN MBC
WILLOW PARK HOUSING TRUST LIMITED [SECOND AGREEMENT]	COMMUNITY	2009.12.16	NONE – £1M BOND IN PLACE	NONE
COMPASS CONTRACT SERVICES (UK) LIMITED	TRANSFEEEE	2010.01.08	UNITED LEARNING TRUST	UNITED LEARNING TRUST
NORTHGATE MANAGED SERVICES LIMITED	TRANSFEEEE	2010.02.01	BOLTON MBC	BOLTON MBC
MELLORS CATERING SERVICES LIMITED	TRANSFEEEE	2010.02.11	TRAFFORD MBC	TRAFFORD MBC
BULLOUGH CONTRACT SERVICES LIMITED	TRANSFEEEE	2010.03.17	FIRST CHOICE HOMES OLDHAM LIMITED	OLDHAM MBC

5. RECOMMENDATION

5.1 The Panel is recommended to note the information contained in this report.