

Staff and Pensions Committee

Employers joining and leaving the Warwickshire Pension Fund

13 September 2021

Recommendation(s)

1. That the Staff and Pensions Committee delegates authority to the Strategic Director for Resources to approve applications from the listed employers subject to the applications meeting the criteria set out in the Local Government Pensions Scheme Regulations 2013.
 - 1.1 New Academies
 - Brailes C of E Primary School (1st August 2021)
 - 1.2 New Employers
 - Sodexo (1st August 2021)
 - Prime Facilities Services (8th June 2021)

1. Executive Summary

- 1.1 The Pension Fund must accept applications from scheduled bodies where the requirements of the regulations are met.
- 1.2 An academy is automatically a Scheme Employer on the basis that it meets the criteria of paragraph 20 of Part 1 of Schedule 2 of the Local Government Pension Scheme Regulations 2013 i.e., it is a 'scheduled body'.
- 1.3 When submitting an application for membership each academy will be required to confirm:
 - That it has internal authority to be admitted to the Pension Fund.
 - The number of members to join the Pension Fund.
 - That the academy will comply with the relevant LGPS Regulations.
- 1.4 The Pension Fund must accept an application from an applicant body made under paragraph 1(d) of Part 3 of Schedule 2 of the Local Government Pension Scheme Regulations 2013 where that body has undertaken to comply with the Regulations.
- 1.5 Birmingham Diocese Multi Academy Trust are the letting authority for the contract with Sodexo and Warwickshire County Council are the letting authority for Prime Facilities Services.
- 1.6 Both have made an application on the basis that they meet the criteria of paragraph 1(d) of Part 3 of Schedule 2 of the Local

Government Pension Scheme Regulations 2013 i.e., it is a 'transferee body'.

- 1.7 The Applicant Bodies have a contract with another Scheme Employer within the Pension Fund and have LGPS admission in respect of this contract.
- 1.8 The Applicant Bodies will be carrying out a function or service on behalf of the Scheme Employer under a contract.
- 1.9 The Applicant Bodies have confirmed that the Scheme Employer will be party to the admission agreement.
- 1.10 The Applicant Bodies have undertaken to comply with the relevant LGPS Regulations.

2. Financial Implications

- 2.1 New entrants to the scheme will be required to cover their own costs and the actuarial process will ensure that employer contributions are appropriate to ensure this is the case.

3. Environmental Implications

- 3.1 None

4. Supporting Information

- 4.1 Warwickshire Pension Fund, Admissions and Terminations Policy 2021

5. Timescales associated with the decision and next steps

- 5.1 At the moment the dates for the academy listed is provisional, next steps will be decided once the admission date is confirmed.
- 5.2 In the event that the application is accepted, arrangements will be made for the Applicant Body to enter into an admission agreement with the Pension Fund. Should admission commence prior to any admission agreement being completed, the Applicant Body has agreed to be bound by the terms of the standard form admission agreement appended to the Pension Fund's Admissions and Termination Policy

Background Papers

- 1. Warwickshire Pension Fund, Admissions and Terminations Policy 2020

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The report was circulated to the following members prior to publication:

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Other members: n/a