

# Staff & Pensions Committee

## Pension Fund Admissions - Academies

12 March 2020

### 1. Recommendation(s)

- 1.1 That the Staff and Pensions Committee delegates authority to the Strategic Director for Resources to approve applications from schools converting to academy status, subject to the applications meeting the criteria:

Kingsway Primary School (Community Academy Trust; 1 April 2020)  
Lillington Primary School (Finham Park MAT; 1 April 2020)  
Wootton Wawen Primary School (Arden Forest MAT; 1 April 2020)  
Henley Primary Academy (Arden Forest MAT; 1 April 2020)

### 2. Executive Summary

- 2.1 An updated Admissions and Termination policy was approved by the Staff and Pensions Committee in June 2017, this includes a requirement for admissions and terminations to be approved by the Committee
- 2.2 A number of pending applications to join the scheme have been recently identified driven by planned academy conversions. This report summarises the schools intending to convert to academy status in the near future or have recently converted.
- 2.3 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'.
- 2.4 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 LGPS Regulations.

### 3. Financial Implications

- 3.1 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.

## **4. Environmental Implications**

- 4.1 None

## **5. Supporting Information**

- 5.1 The Pension Fund has contacted the following schools regarding conversion to academy status

Kingsway Primary School (Community Academy Trust; 1 April 2020)

Lillington Primary School (Finham Park MAT; 1 April 2020)

Wootton Wawen Primary School (Arden Forest MAT; 1 April 2020)

Henley Primary Academy (Arden Forest MAT; 1 April 2020)

- 5.2 The Pension Fund has received notification that Henley Primary Academy is joining the Arden Forest MAT. The transfer will take place on 1 April 2020.
- 5.3 The Pension Fund has received that the academies in the Heartwood CofE MAT (Woodside, Newton Regis, Austrey, and Warton Nethersole academies) are transferring to the Birmingham Diocese MAT. The transfer took place on 1 September 2019.
- 5.4 Although the Birmingham Diocese MAT, Arden Forest MAT and Finham Park MAT are based in the West Midlands, the academies will continue to be members of the Warwickshire Pension Fund due to their geographical location within Warwickshire.

## **6. Timescales associated with the decision and next steps**

- 6.1 The Pension Fund must accept applications from Scheduled Bodies where the requirements of the regulations are met.
- 6.2 The Committee is asked to delegate responsibility for dealing with the applications from the academies listed above
- 6.3 The actual date of conversion of the academy is outside of the control of the Pension Fund. If the conversion does not happen within a reasonable timeframe – by the end of June 2020, then a revised application will be brought to Committee.

## **Appendices**

- 1. None

## **Background Papers**

- 1. None

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

Local Member(s):

Other members: