

**LGPS EMPLOYER'S
DISCRETIONS POLICY FOR ALLIANCE IN PARTNERSHIP ('AinP')
LGPS 2014 Scheme**

| DISCRETION & REGULATION | POLICY ON INDIVIDUAL DISCRETIONS |
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| <p>1). Reg 31: Whether to grant additional pension to a member (up to £6500pa) <i>(Required in Policy Statement)</i></p> | <p><i>AinP will only exercise this discretion in special circumstances. This discretion will only be exercised with the expressed permission of the Staffing Sub-Committee after consideration of the costs that would apply.</i></p> |
| <p>2). Reg 16(2)e & Reg 16(4)d: Whether to it make either a regular or lump sum Additional Pension Contribution (APC) to a member's account (part or whole funding this) [Note: this discretion only relates to cases when the member is working as normal rather than absent from work with permission but no pensionable pay – in the latter scenario, employers must fund it if necessary.] <i>(NEW - Required in Policy Statement)</i></p> | <p><i>AinP will only exercise this discretion in exceptional circumstances. This discretion will only be exercised with the expressed permission of the Staffing Sub-Committee after consideration of the costs that would apply.</i></p> |
| <p>3). Reg 30(6) Whether all or some pension benefits can be paid if an member aged 55 or over reduces their hours/grade and continues to work ("flexible retirement") <i>(Required in Policy Statement)</i></p> | <p><i>AinP will consider employee requests to take flexible retirement on a case by case basis after taking into factors such as service delivery and any costs that may apply. The Staffing Sub-Committee will be responsible for agreeing (or otherwise) to all requests to take flexible retirement.</i></p> |
| <p>4). Reg 30(8) Waiving actuarial reduction on flexible retirement. <i>(Required in Policy Statement)</i></p> | <p><i>AinP will only waive the actuarial reduction on flexible retirement in exceptional circumstances following approval from the Staffing Sub-Committee</i></p> |
| <p>5). Reg 30(8) Waiving actuarial reduction on early retirement (age 55+) – for both active, deferred members & suspended tier 3 ill health pensions <i>(Required in Policy Statement)</i></p> | <p><i>AinP will only waive the actuarial reduction on early retirement in exceptional circumstances and as the result of the expressed permission of the Staffing Sub-Committee after considering the costs that would apply.</i></p> |
| <p>6). TP Regs 1(1)(c) of Schedule 2: Whether to allow the rule of 85 to be "switched on" for members who would normally meet the rule but who will not if they draw the benefits age 55-59</p> | <p><i>AinP will only agree to "switch on" the rule of 85 in exceptional circumstances following approval from the Staffing Sub-Committee after considering the costs that will apply.</i></p> |

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| <i>(NEW - Required in Policy Statement)</i> | |
| <p>7). Regs 22(8 & 9) Whether to extend 12-month period to separate previous LG service. <i>(Not Mandatory in Policy Statement but please complete)</i></p> | <p><i>AinP will only allow an extension to the 12-month period to separate previous LG service where it can be reasonably shown that the member was not provided with the required information within 6 months of starting.</i></p> |
| <p>8). Reg 9(3) Determine rate of employees' contributions. <i>(Not Mandatory in Policy Statement but please complete)</i></p> | <p><i>AinP will review all employees' contribution bands when there has been contractual change to a member's salary or hours at some point during the year. A member's contribution rate will not be reviewed as the result of one-off additional payments (such as honorariums)</i></p> |
| <p>9). Reg 100(6) Whether to extend 12-month period to allow a transfer-in of non-LG pension rights. <i>(Not Mandatory in Policy Statement but please complete)</i></p> | <p><i>AinP will only allow an extension to the 12-month period to combine previous non-LG service where it can be shown that the member was not provided with the required information within 6 months of starting.</i></p> |

Abbreviations

"Reg 16(2)e" means Regulation 16(2)e of the Local Government Pension Scheme Regulations 2013 [which apply from 1 April 2014]

"TP Regs" means LGPS (Transitional Provisions, Savings and Amendment) Regulations 2014].