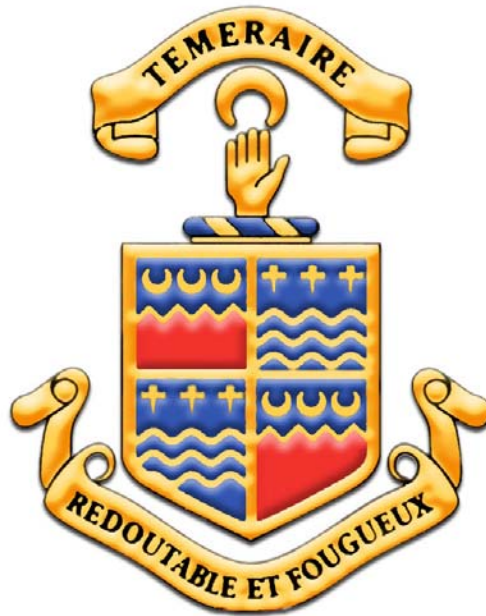


THE HARVEY GRAMMAR SCHOOL



Statement of LGPS Policy Decisions The Local Government Pension Scheme Regulations 2013

June 2014

The Harvey Grammar School has prepared this written statement of policy in relation to its exercise of certain discretionary functions available under the Local Pension Scheme Regulations 2013. The Harvey Grammar School declares that it will keep this statement under review and publish the statement (and any amendments made thereto) in a place that is easily accessible to all of its eligible scheme employees and that it will provide to the administering authority the most up to date version of the statement at all times.

Regulation 16 (2)e and 16 (4)d – Shared Cost Additional Pension Contributions (SCAPC)

It is not The Harvey Grammar School's general policy to operate a SCAPC where a scheme member wishes to purchase extra annual pension (up to the limit defined in the regulations).

This does not apply where a scheme member has a period of child related leave or authorised unpaid leave and elects, within 30 days of return to work, to pay a SCAPC to cover the amount of pension 'lost' during the period of absence, The Harvey Grammar School is required to contribute 2/3rds of the cost. If an election is made after the 30 day time limit the full costs will be met by the scheme member.

Where it is not possible to provide the scheme member with the information that is needed for them to make their election within the 30 day deadline, The Harvey Grammar School will extend the time limit. The scheme member must request this information within 1 month of returning to work and then they must return the election form within one month of the information being provided.

Regulation 30(6) – Flexible Retirement

It is The Harvey Grammar School's policy to provide consent to consider flexible retirement requests only where there are clear financial or operational advantages to The Harvey Grammar School.

Each case will be considered on its merits by the Headteacher.

Regulation 30(8) Waiving of Actuarial Reductions

It is not The Harvey Grammar School's general policy to waive any actuarial reductions applied to benefits paid early, where a scheme member has previously been awarded a deferred benefit or where consent has been given under Regulation (6) unless there are exceptional circumstances.

Each case will be considered on its merits by the Harvey Academy Trust.

Regulation 31 – Award of Additional Pension

The Harvey Grammar School has the discretion to award additional pension (up to the additional pension limit defined in the regulations) to an active member or within 6 months of leaving the scheme to a scheme member who was dismissed on grounds of redundancy or business efficiency.

It is not The Harvey Grammar School's general policy to grant additional pension and The Harvey Grammar School will only exercise this discretion in exceptional circumstances and only at the discretion of the Harvey Academy Trust.

TP Regulations 1 (1)(c) of Schedule 2 – Whether to allow the rule of 85 to be 'switched on' for members from age 55 and before age 60.

It is not The Harvey Grammar School's general policy to make use of the discretion to 'switch back on' the 85 year rule protections unless there are clear financial or operational advantages to The Harvey Grammar School.

Each case will be considered on its merits by the Harvey Academy Trust.

Regulation 9 (1) & (3) - Contributions

The Harvey Grammar School will determine the appropriate contribution band for an employee by using the pensionable pay received on 1 April each year and not make any changes during the year unless there is more than 10% difference in salary.

Variable time employees will have their initial contribution rate at 1 April 2014 set at 5.5%.

The Harvey Grammar School will notify employees of their individual contribution rates by letter each year when any changes are made.

Regulation 17 (1) – Shared Cost Additional Voluntary Contributions (SCAVC)

The Harvey Grammar School will not operate a SCAVC for employees.

Regulation 21 (5) – In determining Assumed Pensionable Pay whether a lump sum payment made in the previous 12 months is a 'regular lump sum'.

The Harvey Grammar School will maintain a list which details what The Harvey Grammar School considers to be regular lump sum payment made to our employees to be used in the calculation of the Assumed Pensionable Pay.

Regulation 22 (7)(b) & 22 (8)(b) - Aggregation of Benefits

Employees who have previous LGPS pension benefits in England and Wales will automatically have these aggregated with their new LGPS employment unless they elect within 12 months of commencing membership of the LGPS in the new employment to retain separate benefits. The Harvey Grammar School has the discretion to extend this period beyond 12 months and each case will be considered on its own merits.

Regulation 100 (6) – Aggregation of Benefits

If an employee wishes to transfer any pension benefits they have built up in other schemes to the Local Government Pension Scheme, the election to do so must be made within 12 months of starting a new period of membership. This time limit may be extended if the employee can demonstrate exceptional circumstances so as to justify this.

Regulation 74 – Applications for Adjudication of Disagreements

Each Scheme employer must appoint a person (“the adjudicator”) to consider applications from any person whose rights or liabilities under the Scheme are affected by:

- (a) a decision under regulation 72 (first instance decisions); or
- (b) any other act or omission by a Scheme employer or administering authority, and to make a decision on such applications.

Responsibility for determinations under this first stage of the Internal Disputes Resolution Procedure (IDRP) rests with “the adjudicator” as named below by the Scheme employer:

The Harvey Grammar School has an arrangement with Mr Yunus Gajra, c/o Pensions Section, 2nd Floor Brenchley House, Week Street, Maidstone, Kent ME14 1RF, in a bid to reduce delay and improve efficiency in this area.

This procedure has been adopted by The Harvey Academy (“the School”) on 1st October 2014 and replaces any previous LGPS policy.

This policy does not form part of any employee’s contract of employment and the School may amend, vary or replace it at any time.

The policy will be reviewed from time to time to ensure that it reflects the School’s legal obligations and organisational and business needs.