

Pension Board

Date: Tuesday, 30th November, 2021

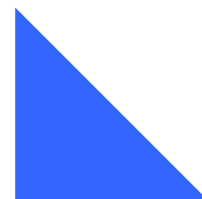
Time: 10.00 am

**Venue: Virtual Meeting - Zoom - Public Access via
YouTube**

<https://www.youtube.com/bathnescouncil>

Board Members: Nick Weaver, Pete Sloman (Employer Representative), Helen Ball (Member Representative), Steve Harman (Employer Representative), Mark King (Member Representative), David Yorath (Member Representative) and Tony Whitlock (Employer Representative)

Chief Executive and other appropriate officers
Press and public



NOTES:

1. **Inspection of Papers:** Papers are available for inspection as follows:

Council's website: <https://democracy.bathnes.gov.uk/ieDocHome.aspx?bcr=1>

2. **Details of decisions taken at this meeting** can be found in the minutes which will be circulated with the agenda for the next meeting. In the meantime, details can be obtained by contacting as above.

3. **Broadcasting of Meetings:-**

The Council will broadcast the images and sounds live via the internet <https://www.youtube.com/bathnescouncil> The Council may also use the images/sound recordings on its social media site or share with other organisations, such as broadcasters.

4. **Public Speaking at Meetings**

The Council has a scheme to encourage the public to make their views known at meetings. They may make a statement relevant to what the meeting has power to do. They may also present a petition or a deputation on behalf of a group.

Advance notice is required not less than two full working days before the meeting. This means that for meetings held on Thursdays notice must be received in Democratic Services by 5.00pm the previous Monday.

Further details of the scheme can be found at:

<https://democracy.bathnes.gov.uk/ecCatDisplay.aspx?sch=doc&cat=12942>

5. **Supplementary information for meetings**

Additional information and Protocols and procedures relating to meetings

<https://democracy.bathnes.gov.uk/ecCatDisplay.aspx?sch=doc&cat=13505>

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Pension Board - Tuesday, 30th November, 2021

**at 10.00 am in the Virtual Meeting - Zoom - Public Access via YouTube
<https://www.youtube.com/bathnescouncil>**

A G E N D A

1. EMERGENCY EVACUATION PROCEDURE
2. APOLOGIES FOR ABSENCE
3. DECLARATIONS OF INTEREST
4. TO ANNOUNCE ANY URGENT BUSINESS AGREED BY THE CHAIR
5. ITEMS FROM THE PUBLIC
6. ITEMS FROM MEMBERS
7. MINUTES OF PREVIOUS MEETING - 21ST SEPTEMBER 2021 (Pages 7 - 14)
8. UPDATE ON LEGISLATION (Pages 15 - 50)

The purpose of this report is to update the Pensions Board on the latest position concerning the Local Government Pension Scheme [LGPS] and any proposed regulatory matters that could affect scheme administration. An updated list is included in Appendix 1.

9. PENSION FUND ADMINISTRATION - OVERVIEW & SUMMARY PERFORMANCE REPORT (Pages 51 - 68)

The purpose of this report is to present the Fund's performance for the three months to 30th September 2021 against its key performance indicators (KPI's) in relation to the administration of pension benefits.

The report also addresses the Fund's business operational position from an overall risk perspective.

10. BRUNEL UPDATE (VERBAL ITEM)
11. BREACHES REPORT (Pages 69 - 82)

The purpose of this report is to update the Pension Board on the Fund's Breaches Policy, procedure for recording & reporting breaches, training carried out for Teams and breaches recorded in the last year.

12. STATUTORY REPORTING AND YEAR END (Pages 83 - 238)

The purpose of this report is to inform the Pension Board of the actions undertaken by the Fund Administration in completion of the 2020/2021 employer year end data exercise and statutory annual benefit statement exercise.

13. APF COMMUNICATIONS UPDATE (PRESENTATION)
14. RISK MANAGEMENT UPDATE - RISK REGISTER (Pages 239 - 248)

The purpose of this report is to update the Pension Board with the latest risk register as at November 2021.

15. PENSION BOARD - TRAINING AND WORK PLAN UPDATE (Pages 249 - 256)

The Committee Administrator for this meeting is Mark Durnford who can be contacted on 01225 394458.

BATH AND NORTH EAST SOMERSET

PENSION BOARD

Tuesday, 21st September, 2021

Present:- Nick Weaver (Chair), Pete Sloman (Employer Representative), Helen Ball (Member Representative), Steve Harman (Employer Representative), Mark King (Member Representative), David Yorath (Member Representative) and Tony Whitlock (Employer Representative)

Also in attendance: Tony Bartlett (Service Director for Financial Control and Pensions), Jeff Wring (Service Director for Commercial and Governance), Geoff Cleak (Pensions Manager), Anna Capp (Member Services Manager), Claire Newbery (Employer Services Manager) Tariq Rahman (Audit Manager) and Carolyn Morgan (Governance and Risk Advisor)

15 WELCOME & INTRODUCTIONS

The Chair welcomed everyone to the meeting.

16 APOLOGIES FOR ABSENCE

There were none.

17 DECLARATIONS OF INTEREST

There were none.

18 TO ANNOUNCE ANY URGENT BUSINESS AGREED BY THE CHAIR

There was none.

19 ITEMS FROM THE PUBLIC

There were none.

20 ITEMS FROM MEMBERS

There were none.

21 MINUTES OF PREVIOUS MEETING: 27TH MAY 2021

The Board approved the minutes of the previous meeting.

22 LGPS REGULATORY UPDATE

The Pensions Manager introduced this report to the Board and highlighted the following areas from within it.

Public Sector Exit Payments Cap

No update on exit payment cap although first summary of data on average exit payments published and guidance on calculating special severance payments released in July.

No immediate action- details of any new exit payments cap still awaited but expected during Q4 potentially. The introduction of any new cap is likely to have administrative implications for the Fund depending on how it is structured.

McCloud Judgment

Following publication by MHCLG of Written Ministerial Statement in May, the Public Sector Pensions and Judicial Offices Bill got its first reading in the House of Lords in July.

Fund to continue work on collating/analysing data from employers in relation to implementing the remedy.

Actuarial firms are liaising with administration software providers to amend the Universal Data Extract to allow for McCloud prior to submission of membership data for the 2022 actuarial valuation. The next reading of the Bill will be in September.

Pete Sloman asked if there was any timeline indicated for a resolution on the Exit Payments Cap.

The Pensions Manager replied that there was not at the present time although regulations were expected to come into force from 2023. He added that a team of officers were in place within the Fund and that they were progressing with the data collection phase.

The Employer Services Manager added that work with employers regarding this was on track and they had received data updates from 130 of them.

The Pension Board **RESOLVED** to note the current position regarding the developments that could affect the administration of the fund.

23 FUND & EMPLOYER PERFORMANCE

The Pensions Manager introduced this report to the Board and highlighted the following areas from within it.

Operationally, on the Member Services team there has been an increase in new monthly tasks over the previous 18 months from circa 1,800 to 2,200 tasks per month with the current outstanding cases totalling 4,841 (an increase of 58% since March 2020). The main volume of work is with member refunds, active member

retirements and retirements from deferred status. Member estimate requests have increased by 35% over the same period. General enquiries also remain high in volume and a number of these identified as duplicate chasers.

As previously agreed by the Pensions Committee a managed phased recruitment process across pensions admin has been in operation since July 2020. During this time twenty-two officers have either been recruited new to post or have moved internally within APF. This process has been managed remotely by senior officers with training and support provided by the new officer training program.

A number of vacant posts remain across the service. (i) As part of the ongoing phased recruitment there are 4.2 fte posts to backfill. (ii) Recruitment of the Technical & Compliance Advisor remains outstanding following the recent advertising campaign resulted in no applications being received. (iii) Recruitment of Transformation Manager and Project Manager – currently being reviewed by Mercer consultant.

During the previous 12 months admin resource has been focussed on managing all critical process as outlined by TPR directive. In addition, during the last 5 months significant time and key officer resource has been focussed on specific projects including (1) Year End data reconciliation & ABS delivery (2) Firefighters Pension Scheme – Immediate Detriment cases (3) Clearance of pre 31st March leaver backlog cases – prior to year end.

Referring to Appendix 1 (Fund Performance against SLA – KPI's) he said that officers were aware that steps need to be made to address performance and workload.

He said that an agreement was in place with the service managers and staff to put in place two teams from October (i) Backlog Focus Team and (ii) Business As Usual Team. He added that these teams would look to be in place for six months, with a review of progress to take place after three months.

He stated that as much as possible they would try to encourage the use of the Member Self Service function as part of My Pension Online.

There has been a minor downturn in the Funds recorded common data errors across most membership categories, with an overall data score of 95.56% for the quarter ending June 2021 down from 95.64% from the previous quarter. Due to work being undertaken on the Interim Valuation this year, data cleansing continues as a key focus. This will continue throughout the next year prior to the Valuation for 2021/2022.

Helen Ball commented that it was important to find the balance between current work and the backlog and welcomed the plans that were being put in place to try and achieve this. She asked if officers knew particularly why there had been an increase in queries.

The Pension Manager replied that in the main it was probably due to a degree of uncertainty surrounding the pandemic and people therefore wanting information

about their pension. He added that it appears that a higher than usual volume of employees have decided to change their employment over the last 18 months.

The Member Services Manager added that staff were trying to progress enquiries as best they can and felt that the focussed approach over the next six months would help.

Helen Ball asked officers to consider whether the Board could have a role in raising awareness of the Member Self Service function to encourage its use.

David Yorath asked if there was likely to be an increase in outsourcing of work.

The Pensions Manager replied that there was no intention to outsource any further work and that this had only been done for two bulk areas of work e.g. Address Tracing and GMP rectification.

Pete Sloman asked how blended working might impact future work and training. He said that if possible it would be better for a number of staff to be back in the office to support each other and attempt to take some pressure off of the more experienced staff.

The Pensions Manager replied that the Member and Employer teams do rely on working together. He said that as part of the plan to clear the backlog of enquiries team members would be given a controlled number of cases to clear. He added that it was hoped that a sensible approach to blended working would be found.

The Service Director for Financial Control and Pensions acknowledged that there is a degree of pressure on the management team and said that across the service there is a large number of good staff. He added that the aim will be to keep things steady over the coming months as they await guidance on when staff can return to the office.

Pete Sloman stated that staff should be supported as much as possible.

The Chair asked if there was IT equipment available to staff who need it.

The Pensions Manager replied that equipment was being supplied but said that the Pensions Service was not within the first or second phase of the new laptop rollout.

The Service Director for Financial Control and Pensions said that it was likely that they would form part of the third phase but was unsure of when that would commence.

The Service Director for Commercial and Governance commented that Microsoft Teams was now available to all staff and that new laptops will be issued to all staff in time and that he expected significant progress to be made in the next Quarter. He added that he would enquire whether the rollout for the Pensions Service could be accelerated.

Helen Ball said that she would like the concerns of the Board regarding employee workload and IT equipment availability to be passed on as it was critical to enable service delivery.

David Yorath commented that he welcomed the issue of climate change being acknowledged within the report.

The Chair asked if there were any further comments regarding recruitment or the Firefighters Pension Scheme – Immediate Detriment cases.

The Pensions Manager replied that the recruitment process has been challenging during the pandemic and wished to thank both the Employer Services Manager and Member Services Manager for their work. He added that the retention of staff also remains an issue.

He said that historically there was very little movement within the Firefighters Pension Scheme, but there were now four separate schemes that were conflicting and difficult to understand. He added that there was no technical solution in place in terms of the Immediate Detriment cases with all work to calculate and provide member options being carried out by officers manually.

The Pension Board **RESOLVED** to note the Fund performance for the three months to 30th June 2021.

24 BRUNEL UPDATE (VERBAL UPDATE)

The Service Director for Financial Control and Pensions addressed the Board. He explained that there are seven new Pension Chairs on the Brunel Oversight Board following the Local Elections in May.

He stated that the transition of Avon's assets to the pool was now complete.

He informed them that Brunel have arranged two Investor Days that will take place on 27th September and 6th October respectively. He added that a Shareholder Forum was also due to take place in October.

The Board **RESOLVED** to note the update.

25 ANNUAL AUDIT REVIEW

The Audit Manager introduced this report to the Board. He explained that Internal Audit last presented to the Pension Board on 13th June 2019 and due to the pandemic did not have the opportunity to report during 2020.

He stated that the Internal Audit Service had carried out and reported on 5 audit reviews since June 2019 and that the Audit reports were attached at Appendices 1 – 5. He added that for each of the 5 reports the audit opinion recorded an Assurance Level 4 – 'Good' and there were not any significant issues to the bring to the Boards' attention.

He added that follow-up work on the iConnect audit and the Scheme of Delegation audit found that all recommendations had been implemented. For the Altair IT System Access audit, one recommendation remains outstanding, and this recommendation is in the process of being implemented. The Risk Management and the Code of Practice 14 audits will be followed-up later in the financial year.

Steve Harman commented that he would like to thank all involved in the work of the audits and felt assured that the appropriate processes were in place.

David Yorath asked if any elements of Prince 2 could be incorporated into future project management tasks.

The Audit Manager replied Prince2 is one method and there are others like Agile. Prince2 normally travels in one direction in a project whereas Agile more easily allows officers to go back and forth within a project to make changes. However, he added that there were aspects of Prince 2 that were followed within the area of work reviewed.

The Chair said that he welcomed the work that had been undertaken and asked if there were plans for future audits.

The Pensions Manager replied that a discussion will take place between himself, the Service Director for Financial Control and Pensions and the Audit Team in due course. He said that an audit on Performance Progress could take place.

The Service Director for Financial Control and Pensions added that a Pensions Payroll audit has recently been completed and that this piece of work will be reported in due course. He added that an audit for the future could include Anti-Fraud.

The Board **RESOLVED** to note the report and outcomes of the Internal Audit work carried out on the Avon Pension Fund.

26 PENSION BOARD ANNUAL REPORT

The Governance & Risk Advisor introduced this report. She explained that the Pension Board reports annually to Council on the work it has undertaken in the previous twelve months and that reference is also made in the report to the future work programme. She stated that the report will be taken to Council on 18th November 2021 along with the Pension Committee's annual report to Council.

The Board **RESOLVED** to approve the Annual Report for 2021.

27 RISK REGISTER UPDATE

The Governance & Risk Advisor introduced this report. She informed them that following the quarterly review of the risk register one of the risk scores was increased as follows:

R01- Disaster Recovery & Business Continuity

The score has been increased from:

Likelihood – unlikely & Impact – medium = score of 6

To Likelihood – likely & impact – medium = score of 9

This is to reflect the fact that the Business Continuity Plan is currently being reviewed by Audit. Plus, following the cyber security benchmarking exercise completed with AON we are currently analysing the results and further internal assurances will be required from IT. An action plan will be developed and a full report taken to Pension Board in Nov 2021 & Committee in December 2021.

The Board **RESOLVED** to note the report.

28 PENSION BOARD WORKPLAN & TRAINING PLAN

The Governance & Risk Advisor introduced this report. She highlighted the Brunel Investor Days that were due to take place in the format of an online seminar on 27 September & 6 October 2021.

The Chair asked if any members needed to update their TPR Toolkit.

The Governance & Risk Advisor replied that she has circulated information on this matter and would welcome any further completions / notifications.

The Board **RESOLVED** to note the report and recommends high level training needs through 2021/22.

The meeting ended at 11.35 am

Chair(person)

Date Confirmed and Signed

Prepared by Democratic Services

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Bath & North East Somerset Council		
MEETING	LOCAL PENSION BOARD - AVON PENSION FUND	
MEETING	30 November 2021	Agenda Item Number
TITLE:	Update on Legislation	
WARD:	All	
AN OPEN PUBLIC ITEM		
List of attachments to this report:		
Appendix 1 – Current matters affecting LGPS administration 19 November 2021		

1 THE ISSUES

- 1.1 The purpose of this report is to update the Pensions Board on the latest position concerning the Local Government Pension Scheme [LGPS] and any proposed regulatory matters that could affect scheme administration. An updated list is included in Appendix 1.

2 RECOMMENDATION

The Pension Board is asked to:

- 2.1 Note the current position regarding the developments that could affect the administration of the fund.

3 THE REPORT

The table below provides a summary of the main regulatory updates since the last meeting, including brief comment on what the implications are for the Fund and what next steps will be. Further details can be found in the updated list included in Appendix 1. Alongside the matters listed in the table below, the Appendix also includes an update on the following matters: the Exit Cap, Minimum Pension Age, and Responsible Investment.

Item	Latest Position	Relevant Links	Action by Fund / Next Steps
General Announcements (N.B. Not included in Report)	<p>Since the last meeting it has been announced that:</p> <p>The Ministry for Housing, Communities and Local Government (MHCLG) will become the Department for Levelling Up, Housing and Communities (DLUHC)</p> <p>The new Local Government Minister will be Kemi Badenoch MP</p>	<p>https://www.gov.uk/government/news/ambitious-plans-to-drive-levelling-up-agenda</p> <p>https://www.gov.uk/government/people/kemi-badenoch</p>	<p>No action required but to note that the appointment of the new minister is likely to lead to some delays in certain areas compared with prior timetables/expectations.</p>
McCloud Judgment Page 14	<p>The Public Sector Pensions and Judicial Offices Bill got its second reading in the House of Lords in September and moved to the Committee Stage on 11 October 2021, followed by the Report Stage on 29 November.</p> <p>Outside of the LGPS, a framework set out by the FBU and LGA in relation to the McCloud Judgment in the Firefighter Schemes requires “Immediate Detriment” cases to be processed in the coming weeks.</p>	<p>https://hansard.parliament.uk/lords/2021-09-07/debates/11830B14-E633-4C98-891F-9BEB6E3EAA67/PublicServicePensionsAndJudicialOfficesBill(HL)</p> <p>https://bills.parliament.uk/bills/3032</p>	<p>Fund to continue work on collating/analysing data from employers in relation to implementing the remedy.</p> <p>Fund to consider resource implications of the need to process Immediate Detriment cases in the Firefighter Scheme.</p>
Cost Control Mechanism	<p>HMT has published both a response to its consultation on the cost management process, and also directions for the 2016 valuation cost controls.</p> <p>SAB have since formally published its report on the 2016 valuation cost management review, which confirms no change to benefits.</p>	<p>https://www.gov.uk/government/consultations/public-service-pensions-cost-control-mechanism-consultation</p> <p>https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1023845/The_Public_Service_Pensions_Valuations_and_Employer_Cost</p>	<p>No immediate action – await further guidance on how revised cost management process will be implemented, in particular with regard to economic check, and also await further update on SAB Tier 3 / employee contribution review.</p> <p>Progress of new Judicial Review by FBU (and BMA) to be followed given may be implications for LGPS at a later stage.</p>

	<p>A response to the consultation issued in relation to SCAPE discount rate methodology still awaited.</p> <p>Outside of the LGPS process the FBU have issued a formal letter before claim for Judicial Review proceedings against the government with regard to the inclusion of the McCloud Judgment in the 2016 cost management process.</p>	<p>Cap Amendment Directions 2021.pdf</p> <p>https://www.lgpsboard.org/index.php/projects/cost-management</p> <p>http://fbu.org.uk/news/2021/11/04/fbu-preparing-take-government-court-over-pensions</p>	
The Pension Dashboard	<p>The PDP has now published a summary of responses to the call for input issued in June together with confirmation of the draft timetable for Regulations and its latest progress report.</p>	<p>https://www.pensionsdashboardsprogramme.org.uk/staging-call-for-input-summary/</p> <p>https://www.pensionsdashboardsprogramme.org.uk/2021/10/26/october-21-progress-update-what-happens-next/</p>	<p>The Fund has recently appointed a dedicated Pensions Dashboard officer to manage the PDP project internally and ensure the Fund is prepared for the requirements of the new regulations once they are published e.g. data quality, ISP considerations and ensuring sufficient resource is available.</p>

4 FINANCIAL IMPLICATIONS

- 4.1 The administrative and management costs incurred by Avon Pension Fund are recovered from the employing bodies through the employer's contribution rates.
- 4.2 Any other specific financial implications will be reported as appropriate.

5 RISK MANAGEMENT

- 5.1 A risk assessment related to the issue and recommendations has been undertaken, in compliance with the Council's decision making risk management guidance.

6 EQUALITIES STATEMENT

- 6.1 A proportionate equalities impact assessment has been carried out using corporate guidelines and no significant issues have been identified.

7 CLIMATE CHANGE

- 7.1 The Fund is implementing a digital strategy across all its operations and communications with stakeholders to reduce its internal carbon footprint. The Fund acknowledges the financial risk to its assets from climate change and is addressing this through its strategic asset allocation to Paris Aligned Global Equities, Sustainable Equities and renewable energy opportunities. The strategy is monitored and reviewed by the Committee.

8 OTHER OPTIONS CONSIDERED

- 8.1 None

9 CONSULTATION

- 9.1 The Council's Monitoring Officer and Section 151 Officer have had the opportunity to input to this report and have cleared it for publication.

Contact person	<i>Geoff Cleak, Pensions Manager; Tel 01225 395277</i>
Background papers	<i>LGA Bulletins SAB Meeting Minutes National Technical Group Meeting Minutes</i>
Please contact the report author if you need to access this report in an alternative format	

List of current developments affecting or expected to affect Scheme Administration – 19 November 2021

Organisation	Item	Details	Status
HMT / MHCLG	Public Sector Exit Payments Cap / Consultation on Further Reform to Exit Payments	<p>Risk Register Item – R53</p> <p>Latest Updates:-</p> <p>It's expected that a new consultation in relation to the Public Sector Exit Payments Cap will be released in early 2022. However, unlike the previous exit cap, there won't be single set of regulations from HMT that will apply and there will be different solutions across the Public Sector, including for the LGPS.</p> <p>Statutory guidance in relation to "special severance" payments that apply to local authorities is expected soon following the consultation that ended in August.</p> <p>Previous Updates:-</p> <p>On 2 July 2021, following a request for data from local authorities in April 2021, MHCLG published its first summary of exit payment data covering 2019-20 and 2020-21. Initial indications are that the average exit payment made in 2020-21 across local authorities was £26,000 including pension strain. Further details can be found here.</p> <p>Also, on 2 July 2021, Although not directly linked to the exit payments cap, MHCLG commenced a consultation on statutory guidance in respect of "special severance" payments that apply to local authorities i.e. over and above statutory entitlements. The consultation ended on 13 August 2021 and an outcome is awaited. A copy of the LGA's response to the consultation can be found here.</p> <p>On 9 April 2021, MHCLG wrote to chief financial officers, of councils and combined authorities, letting them know about a new requirement to provide data on exit payments. Councils will be asked to provide data on all redundancy payments, pension strain payments and other special payments made in consequence of an exit for 2014/15 to 2020/21 by the end of May 2021. The data will be used to inform delivery of the Government's policy to end excessively high exit payments in the public sector.</p>	Updated

Organisation	Item	Details	Status
		<p>On 12 February 2021, HMT published the Exit Payment Cap Directions 2021 disapplying parts of the Restriction of Public Sector Exit Payment Regulations 2020 with immediate effect, meaning the exit cap no longer applies to exits that take place on or after 12 February 2021. HMT expects employers to pay the additional sums that would have been paid, had the exit cap not applied in respect of employees who left between 4 November 2020 and 11 February 2021. On 25 February 2021, The Restriction of Public Sector Exit Payments (Revocation) Regulations 2021 were made and laid before parliament and will come into force on 19th March 2021. These regulations confirm the effect of the disapplication Directions made on the 12th February 2021 but are not retrospective.</p> <p>Despite this revocation, the Government remains committed to implementing reforms to public sector exits which will have the aim of ending excessive payments and bringing practice more in line with the private sector. We understand that MHCLG plans to introduce further changes to exit payments following the recent MHCLG consultation on reforming local government exit pay, however, they will consult again on any further reforms to exit payments before any changes are made. The Government has not confirmed when the exit cap or further reforms will be introduced but we understand an exit cap may be in force later in 2021.</p> <p>On 22 December 2020, three requests for Judicial Reviews of the Restriction of Public Sector Exit Payment Regulations 2020 were given permission to proceed. These requests contest the regulations on a number of grounds, including their effect on the LGPS regulations. It is expected the requests will be heard towards the end of March 2021. MHCLG has confirmed that these hearings will affect the timing of LGPS regulation changes. The LGA understand that these proceedings will prevent any direction by the Pensions Ombudsman on this matter until they are complete although they are seeking clarification on this.</p> <p>On 16 Nov 2020, APF obtained legal advice on the best course of action to take in the interim period, until the LGPS regulations are amended to accommodate the cap. As a result of that advice we have taken the decision to offer a member who exceeds the 95k cap the option of taking immediate payment of fully reduced benefits or the option to defer their benefits for payment at a later date. This is also in line with the Government and Scheme Advisory Board recommendations. We have also adopted a partial change in the factors used to calculate pension strain costs following a formal recommendation from our Actuary. New processes are now in place to deal with any cases that arise going forward.</p>	

Organisation	Item	Details	Status
		<p>On 30 Oct 2020, SAB published its legal advice together with a commentary for LGPS administering authorities and scheme employers, which can be found as follows:-</p> <p>https://www.lgpsboard.org/index.php/structure-reform/public-sector-exit-payments</p> <p>On 28 Oct 2020, a letter was sent from Luke Hall, the Local Government minister, to all LGPS administering authorities in respect of the implementation of the £95k cap from 4th November recommending a course of action to take in the interim period which is that LGPS members caught by the 95k cap, who would normally be forced to take a fully unreduced pension under regulation 30(7), should be able to elect to receive an immediate but fully reduced pension or, if they do not so elect, a deferred pension plus a lump sum equal to the capped strain cost.</p> <p>On 15 October 2020, the legislation implementing the £95k cap on exit payments was signed and therefore will come into force on 4 November 2020. This means that the £95k cap will come into force in advance of the changes to LGPS regulations proposed by MHCLG in the further reform consultation, which will amend the LGPS regulations to provide for the payment of reduced pensions in whole (as is the current provision) and in part. As such, from 4 November 2020 up to the enactment of the MHCLG further reform proposals, which is expected in early 2021, there is a position of legal uncertainty. This is due to the apparent discrepancy between the obligations on scheme employers under the Cap Regulations to limit strain cost payments, and the requirement for administering authorities to pay unreduced pensions to qualifying scheme members under existing LGPS regulations. The SAB has requested the views of Counsel on the risks of challenge to administering authorities and the obligations of scheme employers during this period of legal uncertainty.</p> <p>On 7 September 2020, MHCLG launched a consultation on changes to the Local Government Pension Scheme (LGPS) and Discretionary Compensation Regulations. The consultation covers the required changes to compensation and pension regulations to implement both the £95K exit payment cap as well as public sector exit payments further reform proposals issued by HMT in 2016. The latter proposals were left to individual departments to implement rather than being via central HMT Directions, currently no other part of the public sector has any 'live' proposals to enact the further reform proposals. The MHCLG consultation closes on the 9 November and</p>	

Organisation	Item	Details	Status
		<p>APF are in the process of formulating a response. At this stage there have been no proposals to implement an exit payment recovery process that was also consulted on in 2015.</p> <p>On 21 July 2020, HM Treasury published the Governments response to the consultation on restricting exit payments in the public sector. This was followed by the publication of draft regulations which include a list of employers who will be covered by the cap, which is set at a total of £95,000. Exit payments include redundancy payments, severance payments, pension strain costs and other payments made as a consequence of termination of employment. The Regulations will need to be approved by both houses of parliament and will come into force 21 days after that process is complete. We understand it is the intention that the cap will be in force for the end of the 2020 calendar year.</p> <p>This will affect LGPS members in England and Wales who currently qualify for an unreduced pension because of redundancy or efficiency retirement. It will also apply to members whose employer agrees to the early release of their benefits without actuarial reduction, apart from ill health retirement which is excluded. If the cap is breached, then the member may have to take a reduced pension. MHCLG is looking at options to introduce choice to allow members in this position to opt for a deferred pension instead. We also expect the introduction of a standard strain cost calculation so that the cap will apply equally to members across the country. We are expecting a consultation on changes required to the LGPS regulations imminently.</p> <p>Background:-</p> <p>The government first consulted on plans to cap exit payments in the public sector in 2015.</p> <p>On 10 April 2019, HMT launched a consultation called 'Restricting exit payments in the public sector: consultation on implementation of the regulations'. The key points in this latest consultation were as follows:-</p> <ul style="list-style-type: none"> • No change from the earlier proposal that the maximum exit payment will be £95,000. • The cap will apply to a wide range of public sector employers, including employees of councils in England and Wales, fire authorities, police forces, academies and maintained schools. 	

Organisation	Item	Details	Status
		<ul style="list-style-type: none"> The £95,000 cap will include the value of any early retirement strain payments, and it is envisaged that the ability to take an unreduced early retirement pension will therefore be severely restricted in some cases. Certain employers in the LGPS e.g. Universities and Colleges appear not to be covered which will means members would be treated differently within the LGPS depending on their employer on exit. As previously indicated, there will be provisions for the cap to be waived in some circumstances. However, the tone of the consultation makes clear that any waiver is expected to be the exception rather than the norm. <p>It was expected that MHCLG will run a separate consultation, which will cover amongst other things the agreement and implementation of a common costing methodology and factors for strain payments.</p> <p>HMT received approximately 600 responses, one of which was from APF, and it was expected that they would publish their response in the autumn of 2019 and look to introduce the cap no sooner than 1 April 2020.</p>	
Government	McCloud Judgement	<p>Risk Register Item – R63</p> <p>Latest Updates:-</p> <p>On 11 October 2021, The Public Sector Pensions and Judicial Offices Bill moved to Committee Stage. The Report stage will take place on 29 November 2021. It is now expected that any amendments made by the Government in relation to the LGPS and how the remedy will be implemented will emerge at the House of Commons Committee Stage.</p> <p>Funds have also been encouraged to collect data on all members who were active on/before 31 March 2012, not just those on 31 March 2012 given the potential for scope to change as part of the amendments referred to above.</p> <p>Further details on the timing, and the Bill itself, can be found here.</p>	Updated

Organisation	Item	Details	Status
		<p>Once the Bill eventually receives Royal Assent, Regulations for each of the Public Sector Schemes will be released. This is expected in Spring 2022. There will also be a consultation in Spring/Summer 2022 on draft guidance to assist Funds in implementing the remedy.</p> <p>On 8 October 2021 the Fire Brigades Union and the Local Government Association issued a Memorandum of Understanding and Framework setting out a mechanism to handle “Immediate Detriment” cases emerging from the McCloud Judgment in relation to the Firefighter Schemes in a consistent manner. Whilst this does not immediately impact the LGPS, there will be an impact on the Fund’s available resource in the short-term whilst such cases are considered, which will need to be managed.</p> <p>On 7 September 2021, The Public Sector Pensions and Judicial Offices Bill got its second reading in the House of Lords.</p>	
		<p>Previous Updates:</p> <p>On 19 July 2021, The Public Sector Pensions and Judicial Offices Bill got its first reading in the House of Lords. The Bill makes provision to rectify the unlawful age discrimination identified by the McCloud Judgment. Chapter 3 of Part 1 of the Bill confirms which members will be in scope in the LGPS and what service is ‘remediable’. Enabling legislation will allow for scheme regulations to be changed to formally implement the McCloud remedy. The second reading of the Bill will take place in the House of Lords on 7 September 2021.</p> <p>On 13 May 2021, MHCLG published its Written Ministerial Statement setting out the government’s high level objectives on how the remedy to the McCloud Judgment will be applied. The statement can be found here.</p> <p>On 8 October 2020 APF issued their response to the consultation which was included as an appendix to this report at the December meeting</p> <p>The SAB response to MHCLG's consultation is available to view in the following location:-</p> <p>http://lgpsboard.org/images/PDF/letters/SAB_FINAL_MCCLLOUD_RESPONSE.pdf</p>	

Organisation	Item	Details	Status
		<p>The notes from the SAB meeting in August advised that their response would include representations to allow the LGPS regulations to be on the statute book ahead of those of the unfunded public service pension schemes, where the coming into force date is expected to be Spring 2022. LGPS remedy regulations will not have to wait for changes in primary legislation so different timescales should be possible. Getting LGPS McCloud regulations in place sooner will give all parties more opportunity to put processes in place before they come into effect in 2022. The Board also agreed that work should commence on central guidance on how the regulations are to be applied and how individual cases of poor or missing member data should be handled.</p> <p>On 16 July 2020, MHCLG published a consultation on amendments to the statutory underpin which are designed to remove age discrimination from the LGPS, see link here. In summary, the consultation proposes that qualifying members, all who were active in 2008 scheme on 31st March 2012 and accrued benefits in the 2014 scheme without a disqualifying break, would be protected by the application of a revised underpin which will be applied retrospectively for those who have already left the scheme. The consultation runs until 8th October 2020 and we are currently in the process of formulating a response.</p> <p>At the SAB meeting in February, the Board agreed to create two working groups to help implement the outcome of the McCloud judgment for the LGPS. These will be a small policy group to help MHCLG consider areas of policy not determined by HMT and a larger implementation group made up of practitioners, member representatives, actuaries, software providers and employers. They will consider the challenges of implementing and communicating the scheme changes. Due to differences in LGPS transitional protection, MHCLG are planning to undertake an LGPS specific consultation on the regulatory changes required to address McCloud. We are expecting the consultation to begin late June / early July 2020.</p> <p>Background:-</p> <p>The McCloud/Sargeant cases concern the transitional protections provided to older members of the judges and firefighter pension schemes following their reform in 2015 as part of the public sector pension scheme changes. In December 2018, the Court of Appeal found the transitional protections to be unlawful on the grounds of age discrimination. In June 2019, the Supreme Court denied the Government's request for an appeal and as such the case was returned to an Employment Tribunal for remedy.</p>	

Organisation	Item	Details	Status
		<p>In July 2019, the Chief Secretary to the Treasury announced in a written statement that ‘the government believed that the difference in treatment will need to be remedied across all public sector schemes, including the LGPS’. As such, the SAB agreed to establish two working groups, one to assist MHCLG in considering any areas of policy not centrally determined and the second to consider the challenge of implementing and communicating any changes. A consultation, including draft legislation, is expected in the Spring, although there is likely to be a need for changes in primary legislation that may take some time.</p> <p>You can find a dedicated ‘Cost Management’ page on the SAB website as follows:-</p> <p>http://lgpsboard.org/index.php/structure-reform/mccloud-page</p>	

Organisation	Item	Details	Status
SAB	LGPS Cost Management Process	<p>Risk Register Item – R47</p> <p>Latest Update:-</p> <p>On 4 November 2021, the FBU has issued a formal letter before claim for Judicial Review proceedings against the Government with regard to the inclusion of the McCloud Judgment in the 2016 cost management process. This is likely to be heard in the middle of next year. If upheld, there may be implications for the LGPS. Further details can be found here.</p> <p>On 15 October 2021, the SAB published the outcomes of its own 2016 valuation cost management process (following confirmation from HMT on the cost control directions). Full details of the process can be found here and confirmed that there would be no change to benefits emerging from the process once allowance for the McCloud Judgment had been taken into account. However, the SAB has formally commented now that it will still be seeking to review Tier 3 ill-health benefits and employee contributions for the low paid in the future, outside of the cost management process.</p> <p>DLUHC, SAB, GAD will be considering how the revised principles of the HMT process will apply to SAB's own process in readiness for the 2020 valuation assessment being undertaken.</p> <p>On 7 October 2021, HMT published the Public Service Pensions (Valuations and Employer Cost Cap) (Amendment Directions) 2021 which allow public sector schemes to conclude their 2016 valuations by setting out how they will carry out the cost control element of these valuations.</p> <p>On 4 October 2021, HMT responded to the consultation on the cost control mechanism. The response can be found here and confirmed that:</p> <ul style="list-style-type: none"> • The mechanism would be changed so that it only covers the reformed schemes. • The corridor would be widened from 2% to 3%. • There would be the introduction of an “economic check” so that when the corridor is breached, a further check of broader economic conditions would be carried out before any breach would be implemented. <p>Whilst not directly addressing concerns raised by LGPS stakeholders (in particular with regard to how the economic check will be carried out for the LGPS), there is an acknowledgement from HMT to discuss these further and agree the appropriate way these changes can be introduced</p>	Updated

Organisation	Item	Details	Status
		<p>(alongside consideration of how the changes will impact the SAB cost management process, and also how similar changes can be affected in Scotland and Northern Ireland).</p> <p>A response to the consultation on the methodology used to set the SCAPE discount rate is still awaited.</p> <p>Previous Updates:-</p> <p>On 19 August 2021, the SAB published its response to the consultation on the cost control mechanism. The response can be found here</p> <p>Similarly, LGA published its response to the consultation on the discount rate, which can be found here.</p> <p>On 24 June 2021 a Written Ministerial Statement was laid which announced the publication of two consultations. The first was about proposed reforms to the cost control mechanism and covered 3 main areas:</p> <ul style="list-style-type: none"> • A change to the mechanism so that it only covers the reformed schemes. • A widening of the corridor from 2% to 3%. • The introduction of an “economic check” so that when the corridor is breached, a further check of broader economic conditions would be carried out before any breach would be implemented. <p>The second consultation was about the discount rate used in valuations of unfunded public service pension schemes and potential changes to the SCAPE methodology used. Whilst primarily impacting the other public sector schemes (given the SCAPE discount rate is used to determine contribution rates) any changes would impact the LGPS given it is used by GAD to produce actuarial factors e.g. early retirement etc.</p> <p>Both consultations closed on 19 August 2021.</p> <p>We understand that this is to be one of the main topics of discussion at the meeting of the SAB which took place on 10 May 2021 and await further information of the outcome of these discussions.</p>	

Organisation	Item	Details	Status
		<p>At the SAB meeting in November, the Board was reminded of the decision it took when it last met in August to un-pause its own cost cap arrangement until HM Directions including proposals on how McCloud costs are going to be taken into account are published over the coming months. Members were also advised that the Government Actuary's Department is undertaking a review of the cost cap arrangement but that it is unlikely to have any impact on the outstanding 2016 cost cap process or the forthcoming 2020 process.</p> <p>The Government announced updates on the 2016 valuation and cost control mechanism for the unfunded public sector pension schemes advising that the cost control element of the 2016 valuations will now be completed incorporating the cost of implementing the McCloud remedy. There will be no reduction to member benefits as a result of completing the 2016 valuation if the cost ceiling is breached. However, if the cost floor is breached, this will be honoured by implementing increases in benefit accrual and/or reductions in member contributions backdated to 1 April 2019.</p> <p>The notes from the SAB meeting in August advise that, unlike the HMT arrangement, there is no compulsion on SAB to include McCloud costs in their cost management arrangement. However, it was agreed that no decision should be taken until the HMT Direction, on how McCloud costs are to be considered, is published early next year. In principle, the Board agreed that the LGPS cost cap arrangement should be un-paused in the same way as the HMT arrangement, but no action should be taken until more details are known.</p> <p>At the National Technical Group in October, MHCLG further updated that once the McCloud remedy is agreed, the value of scheme member benefit is likely to increase for many members. The cost control mechanism was designed to include the cost of these and they will be included in the completion of the cost control process. How best to do this in the LGPS will be decided once the remedy details are decided.</p> <p>On 16 July 2020 the Government made an announcement confirming that the cost control mechanism pause will be lifted, and the cost control element of the 2016 valuations process will be completed for all public service pension schemes. The objective would be to complete the process by next year, taking into account the cost of the proposals to remedy age discrimination as set out in the McCloud consultations which were published that same day. The SAB are</p>	

Organisation	Item	Details	Status
		<p>currently considering its position on the SAB employer cost cap process now that the proposals to rectify age discrimination for the LGPS are available.</p> <p>In April 2020 four unions including the FBU and the GMB filed court proceedings against the Government claiming that the pause in the cost control mechanism is unlawful. The unions are arguing for an improvement in member benefits as a result of the valuation results.</p> <p>On 17 October 2019 GAD issued a formal request for valuation data as at 31 March 2019 as part of the cost management process that is due to be carried out in 2020. APF data was submitted to GAD ahead of the deadline of 18 November 2019.</p> <p>On 14 May 2019 SAB published an advice note covering the implications of McCloud/Cost Cap in relation to the 2019 fund valuations.</p> <p>Background:-</p> <p>One of the Board's statutory duties, under the regulations, is to introduce and maintain a process to manage costs in the scheme alongside the process introduced by HM Treasury for all public service schemes. You can find a dedicated 'Cost Management' page on the SAB website as follows:-</p> <p>http://lgpsboard.org/index.php/structure-reform/cost-management</p> <p>In September 2018, SAB members were provided with a summary of the statement regarding the scheme valuations for all of the public service pension schemes, including the LGPS, which showed that the cost cap floor had been breached and as a result member benefits would need to be improved. SAB therefore put together a working group responsible for agreeing a package of benefit changes to return the scheme to its total target cost, while also looking at employee contributions at the lower end. It was intended that the resultant package would be put to the full SAB for agreement to ensure that scheme changes could be on the statute book by April 2019.</p> <p>However, in January 2019 the Government announced a pause in the cost management process for unfunded public sector schemes due to uncertainty caused by the McCloud court ruling on elements of the 2015 scheme reforms. In February, SAB learned that this applied equally to the</p>	

Organisation	Item	Details	Status
		LGPS and as such it had no option but to pause its own cost management process pending the outcome of McCloud. As a result there were no changes to benefits planned in respect of the cost cap and instead this situation would be reviewed once McCloud was resolved.	
SAB	Good Governance in the LGPS	<p>Previous Updates:-</p> <p>On 15 February 2021, the Scheme Advisory Board published Good Governance: Phase 3 Report which was produced by the Hymans Robertson project team. The Phase 3 report, link here, provides further details on some of the recommendations that were included in the Phase 2 Report. The Board agreed that the Chair should submit the Board's Good Governance Action Plan, link here, to the Local Government minister for consideration.</p> <p>At the SAB meeting in August 2020, Hymans updated the Board that draft papers on how the recommendations set out in the Phase II report are to be implemented, will be completed by the end of September 2020. The Board will consider these drafts when it meets in November 2020. If approved, the Board will then consider the process and timing of implementation.</p> <p>In April 2020, a virtual meeting of the chairs of the SAB and its two committees was held and it was agreed that Hymans work on Phase III of the Good Governance project should proceed on a limited basis due to COVID-19. They should continue to prepare papers for the SAB's consideration based on discussions already undertaken with the implementation group. However, they should avoid engaging with members of the implementation group, or local government in general at this time.</p> <p>In February 2020, the Board agreed that an implementation group, comprising the two former working groups, should be established immediately to prepare a detailed implementation plan for consideration at their next meeting.</p> <p>In November 2019, a draft Phase II report into the findings of both working groups was made available to the Board who considered it and agreed that it should be published with comments invited from scheme stakeholders. The report made recommendations for new standards of governance and administration and proposed how they could be measured and assessed independently. The recommendations covered the areas below:</p> <ul style="list-style-type: none"> • general governance 	No Further Update

Organisation	Item	Details	Status
		<ul style="list-style-type: none"> • conflicts of interest • representation • skills and training • service delivery for the LGPS function • compliance and improvement <p>You can find the report as follows:-</p> <p>http://lgpsboard.org/images/PDF/HymansRobertson_GoodgovernanceintheLGPS_Phase-II_November2019.pdf</p> <p>Comments on the phase II report were invited to be sent and APF issued a response to this in January 2020 concluding that overall, we were still unsure of the specific problems attempting to be addressed through some of the proposals. It seemed that another layer of governance was being added because there are some local issues around the effectiveness of Local Pension Boards or Fund Administrations. Maybe the Pension Regulator could intervene and deal with these issues as demonstrated in its own recent engagement report. Within the recommendations there were still a lot of 'shoulds' or 'coulds' whereas regulation and a definitive set of standards monitored by the Pension Regulator would be more effective.</p> <p>In April 2019, Hymans launched the Good Governance Project Survey to capture as many views as possible from those working within the LGPS with the findings forming the basis for a report which was presented to the SAB in July 2019, you can find the report as follows:-</p> <p>http://lgpsboard.org/images/PDF/GGreport.pdf</p> <p>Work to develop a detailed plan then began and two working groups were established, one to focus on defining good governance outcomes and the guidance needed to clearly set them out and the other to focus on options for the independent assessment of outcomes and mechanisms to improve the delivery of those outcomes.</p> <p>Background:-</p>	

Organisation	Item	Details	Status
		Previously known as the separation project which was developed to identify the potential benefits of further increasing the level of separation between the host authority and scheme manager role. In November 2018, the project was awarded to Hymans Robertson and was also re-named to "Good Governance in the LGPS" which better reflected the aims and ambitions of the project to enhance the delivery of the function within local authority structures.	
SAB	Tier 3 Employers	<p>Previous Updates:-</p> <p>At the SAB Meeting in May 2020, members were advised that the working group set up to take this work forward has not been able to meet but discussions with MHCLG are being progressed.</p> <p>At the SAB Meeting in Jan 2019, the Board was advised that the work of the third tier employers' project working group had been put on hold due to competing priorities.</p> <p>In Sept 2018, a final version of the Aon report was published and can be found as follows:- http://lgpsboard.org/images/PDF/Tier_3_employers_in_the_LGPS_FINAL.pdf</p> <p>At the SAB meeting in Jun 2018, Aon presented members with a summary of the final draft report. The Board was anxious to point out that the report makes no attempt to make any recommendations, instead, it outlines a range of issues raised by stakeholders and how they envisage these concerns being resolved.</p> <p>The Board agreed that the report should be published and that a small working group of Board members will be established to review the concerns expressed by third tier employers in the report and the ways in which they could be resolved. The working group will be tasked to report back to the Board later in the year with a set of recommendations for further consideration. Once approved, scheme stakeholders will be given the opportunity to comment on the Board's recommendations before any formal approach is made to MHCLG Ministers for changes to the scheme's regulations or guidance.</p> <p>Background:-</p>	No Further Update

Organisation	Item	Details	Status
		<p>As part of its work plan for 2016/17, SAB wanted to identify the potential funding, legal and administrative issues and liabilities relating to admitted and scheduled bodies that do not benefit from local or national tax-payer backing (Tier 3 employers).</p> <p>The work was split into two concurrent phases:</p> <p>1) The Board was to work with LGPS administering authorities to gather data regarding the number, membership, liabilities and covenants of these employers.</p> <p>2) Separately the Board appointed Aon to assist it in further analysis in this area.</p> <p>You can find a dedicated 'Tier 3 Employers' page on the SAB website as follows:-</p> <p>http://lgpsboard.org/index.php/structure-reform/tier-3-employers</p>	
MHCLG	Consultation on Fair Deal	<p>On 10 December 2019, a representative from MHCLG provided the following update to the LGPS National Technical Group "The analysis of consultation response has been completed. Officials have started to draft the government response but the content of that is still conditional on some further ministerial decisions that will need to be taken once the new government is formed".</p> <p>Background:-</p> <p>In Jan 2019, MHCLG launched a policy consultation and draft regulations on 'Fair Deal – strengthening pension protection' in the LGPS. The consultation contained proposals to strengthen the pension protections that apply when an employee of a LGPS employer is compulsorily transferred to the employment of a service provider. The proposed amendments to the LGPS Regulations 2013 would, in most cases, give transferred staff a continued right to membership of the LGPS. These changes are intended to bring the LGPS in line with the government's October 2013 Fair Deal guidance that applies in relation to transfers from central government.</p> <p>MHCLG received around 79 responses, one of which was from APF.</p>	No Further Update

Organisation	Item	Details	Status
HMT	Written Ministerial Statement on Survivors Benefits	<p>Previous Update:-</p> <p>On 20 Jul 2020, the Chief Secretary to the Treasury made a written statement on public service pensions, survivor benefits for opposite-sex widowers and surviving male civil partners. The statement was in relation to a Teachers Pension Scheme Employment Tribunal case where male survivors of female scheme members remain entitled to a lower survivor benefit than a comparable same-sex survivor and confirmed that government believes that this difference in treatment will also need to be remedied in those other public service pension schemes, where the husband or male civil partner of a female scheme member is in similar circumstances. We await guidance from MHCLG on what action administering authorities in England and Wales should take.</p>	No Further Update
MHCLG	Consultation on LGPS Local Valuation Cycle and the Management of Employer Risk	<p>Risk Register Item – R62 (In respect of Exit Credits)</p> <p>Previous Updates:-</p> <p>On 27 May 2021, following a judicial review, a High Court Judge rejected the claim that challenged the lawfulness of the LGPS regulations introduced in 2020 that extinguished a contractors' right to Local Government Pension Scheme "exit credits" with retrospective effect. Full details of the ruling can be found here.</p> <p>One of the recommendations from the ruling was for Funds' policies to not explicitly rule out the payment of an "exit credit" on the sole basis that risk sharing arrangements with the letting employer existed.</p> <p>In April 2021, the Fund published its updated Funding Strategy Statement (FSS) following a consultation exercise with employers to outline proposed changes to the FSS to allow for the regulatory changes referred to below linked to employer flexibilities. The updated FSS can be found here.</p> <p>On 2 March 2021, MHCLG published statutory guidance to assist LGPS administering authorities and scheme employers in implementing and operating the regulations on employer flexibilities introduced in September 2020. More detailed guidance prepared by the Scheme</p>	No Further Update

Organisation	Item	Details	Status
		<p>Advisory Board, to be read in conjunction with MHCLG's statutory guidance, was published on 22 February 2021.</p> <p>MHCLG are defending two claims for judicial review challenging the 2020 amendment to the LGPS Regulations on the payment of exit credits. The claimant in the Northants case was granted permission by the court on 12 November to proceed to a full hearing and the case is listed to be heard in March.</p> <p>On 2 December 2020, the secretariat to the SAB emailed pensions managers for comment on a draft guide to employer flexibilities. This was prepared by the SAB in conjunction with representatives from administering authorities and scheme employers. The purpose of the guide is to provide operational and practical assistance to administering authorities and employers when implementing employer flexibilities introduced by the Local Government Pension Scheme (Amendment) (No. 2) Regulations 2020. APF issued a response on 7 January 2021.</p> <p>On 26 Aug 2020, MHCLG published a second partial response to this consultation covering greater flexibility on employer exit payments and the ability to review employer contributions between valuations. The LGPS (Amendment) (No.2) Regulations 2020 provided for the changes and came into effect from 23 September 2020. A working group has been established by MHCLG to prepare statutory guidance, to accompany the regulations, to assist with the necessary revisions required to Funding Strategy Statements</p> <p>A further response will be made by MHCLG in relation to the other proposals in the consultation (changes to the local fund valuation cycle, interim valuations and the status of further education, sixth form college and higher education corporations in England and Wales) in due course.</p> <p>On 27 Feb 2020, MHCLG published a partial response to this consultation covering the proposals on exit credits only. MHCLG will submit a further response to the other proposals covered by this consultation in due course.</p> <p>The response confirms that the majority of respondents supported the proposal to allow administering authorities to take account of an employer's exposure to risk when calculating an</p>	

Organisation	Item	Details	Status
		<p>exit credit. The Local Government Pension Scheme (Amendment) Regulations 2020 giving effect to these proposals were laid in Parliament and came into force on 20 March 2020.</p> <p>Background:-</p> <p>In May 2019, MHCLG launched a 12 week consultation on policy proposals to amend the rules of the Local Government Pension Scheme 2013 in England and Wales. It covered the following areas:</p> <ol style="list-style-type: none"> 1. Amendments to the local fund valuations from the current three year (triennial) to a four-year (quadrennial) cycle 2. A number of measures aimed at mitigating the risks of moving from triennial to quadrennial cycles 3. Proposals for flexibility on exit payments (Update - Resolved following second partial response to consultation in Aug 2020 and Amendment Regulations in Sept 2020). 4. Proposals for further policy changes to exit credits (Update - Resolved following partial response to consultation in Feb 2020 and Amendment Regulations in Mar 2020). 5. Proposals for policy changes to employers required to offer LGPS membership <p>MHCLG received around 280 responses, one of which was from APF.</p>	
HMT	Equalisation of GMPs in public service pension schemes	<p>Previous Updates:-</p> <p>Following discussions between MHCLG and GAD, MHCLG are now liaising with HMT to determine how retrospective adjustments to CETV payments should be applied in public sector</p>	No Further Updates

Organisation	Item	Details	Status
		<p>schemes and further guidance is awaited on this specific matter. A consistent approach is preferred.</p> <p>On 20 November 2020, the High Court ruled that trustees who do not equalise a member's GMP benefits at the time of calculating a cash equivalent transfer value (CETVs) have committed a breach of duty. Defined benefit schemes providing GMPs should revisit historic CETVs made in the past 30 years and top them up where necessary. The judgment does not force organisations to actively correct all pensions transfers; however, employers may look to do so to avoid legal proceedings from members affected. We await further guidance from MHCLG and GAD on how GMP equalisation will be achieved in the LGPS.</p> <p>Background:-</p> <p>On 26 October 2018, Mr Justice Morgan handed down judgment in Lloyds Banking Group Pensions Trustees Limited v Lloyds Bank PLC, HBOS PLC, Angela Sharp, Judith Cain, Susan Dixon, Secretary of State for Work and Pensions and HMT. The High Court has held that schemes must equalise the discriminatory effects of GMPs and that this can be achieved using several methods. At the time, HMT confirmed that the judgement “does not impact on the current method used to achieve equalisation and indexation in public service pension schemes”.</p>	
HMT	Indexation of GMPs in public service pension schemes	<p>Previous Updates:-</p> <p>On 23 March 2021, the Government published its response to the consultation on Guaranteed Minimum Pension (GMP) Indexation in Public Service Pension Schemes (PSPS). The response concludes that the Government has decided to discount conversion as a long-term policy solution and make the interim solution the permanent solution for GMP indexation in PSPS. This approach will mean that PSPS will be directed to provide full indexation to those members (including survivors) with a GMP (or inherited GMP in the case of a survivor), reaching State Pension age (SPa) beyond 5 April 2021.</p> <p>The accompanying HM Treasury Direction (issued under section 59A of the Social Security Pensions Act 1975), implementing the decision, has been updated. The updated direction commenced on 6 April 2021 and applies in England, Scotland and Wales.</p>	No Further Update

Organisation	Item	Details	Status
		<p>On 21 December 2020, the LGA and the LGPC submitted a joint response to the consultation setting out their view that they do not consider an extension of full indexation until April 2024 to be enough time, and that they believe it should either be extended for as long as possible, potentially until April 2030, or be made the permanent solution. Their main reason for this response being that the administrators of public service pension schemes are currently undertaking large programmes of work which are unlikely to be completed much before April 2030. A government response on the consultation is expected by April 2021.</p> <p>On 7 October 2020, the government published a written ministerial statement and consultation on how it proposes to ensure it continues to meet these past commitments to public service employees regarding the full indexation of public service pensions, including for any related GMP element for members of public service pension schemes. The consultation, which closes on 30 December 2020, considers the policy options available to the government and proposes to extend the interim solution until at least April 2024 or to make it a permanent solution. A link to the consultation can be found as follows:-</p> <p>https://www.gov.uk/government/consultations/public-service-pensions-guaranteed-minimum-pension-indexation-consultation</p> <p>In Feb 2020, HMRC published a newsletter on GMP equalisation. HMT are working with MHCLG to assess if GMP equalisation must apply to LGPS members' benefits and will notify administrators of the outcome in due course.</p> <p>Background:-</p> <p>On 6 April 2016, the government introduced the new State Pension (nSP). The reformed system simplified pension provision but removed the mechanism that enabled those public servants in 'contracted-out' employment between 1978 – 1997 to have their Guaranteed Minimum Pension (GMP) fully price protected.</p> <p>On 1 March 2016, the government announced that public service pensioners reaching SPa after 5 April 2016 and before 6 December 2018, would have the GMPs earned in public service fully indexed by the public service pension scheme.</p>	

Organisation	Item	Details	Status
		<p>The government then launched a consultation to consider whether public service pension schemes should pay full indexation on GMP earned while a member of a public service pension scheme, for someone who reaches SPa after 5 December 2018.</p> <p>In Jan 2018, HMT published its response to the consultation directing that the “interim solution” between 6 April 2016 and 5 December 2018 be extended for a further two years and four months. This will cover those members of public service schemes with a GMP who reach state Pension Age on or after 6 December 2018 and before 6 April 2021. During this period, the government will investigate the possibility of an alternative long-term methodology, known as “conversion”.</p>	
Government	Pension Schemes Bill	<p>Previous Updates:-</p> <p>On 11 February 2021, the Pension Schemes Act 2021 received Royal Assent and the provisions within the Act will come into force when the Secretary of State makes regulations for them to do so. The Act paves the way for the creation of Pensions Dashboards and the introduction of new powers for TPR concerning employer debt. It also introduces a requirement to assess, manage and report on climate related risks and extra conditions that members must satisfy before they are able to transfer out their LGPS benefits.</p> <p>The provisions of the Act that will affect the LGPS in the main are:-</p> <p><u>Climate risk reporting</u> On 27 January 2021, the Government launched a consultation on regulations entitled ‘Taking action on climate risk: improving governance and reporting by occupational pension schemes’ which ran until 10th March 2021. The scope of the regulations do not include the LGPS however regulations are expected from MHCLG to substantially mirror the requirements set out in this document with a consultation on such regulations expected in the near future.</p> <p><u>Pensions Dashboards</u> Administering authorities should take action to improve data quality to ensure that they are ready to supply the right information to the dashboards once they are live.</p>	No Further Update

Organisation	Item	Details	Status
		<p><u>Transfers out</u> We are waiting for secondary legislation to fill in the detail of the extra conditions members must satisfy before they are able to transfer out their LGPS benefits.</p> <p>On 7 Oct 2020, the Pension Schemes Bill, which started in the House of Lords and was introduced into the House of Commons on 16 July 2020, had its Second Reading and is due have two days in Public Bill Committee on 3 and 5 November.</p> <p>On 19 Dec 2019, the Queen announced, in her speech, that the Government will reintroduce the Pension Schemes Bill which has been introduced in the House of Lords with the second reading on 28 January 2020. The Bill will now move to committee stage.</p> <p>On 14 Oct 2019, the Queen confirmed, in her speech, that a new Pension Schemes Bill will be introduced and will:-</p> <ul style="list-style-type: none"> strengthen TPR's powers provide a framework to support pensions dashboards and introduce regulations covering the right to a pension transfer. 	
TPR	Codes of Practice	<p>Previous Update:-</p> <p>On 24 August 2021, TPR published its interim response to its consultation on the New Code of Practice which ran from 17 March 2021 to 26 May 2021. The main areas of concern from respondents focussed on Unregulated Investments and the requirements for schemes to carry out an "own risk assessment".</p> <p>Further details can be found here.</p> <p>It's not expected that the New Code will become effective before Summer 2022.</p> <p>On 17 March 2021, TPR launched its New Code of Practice consultation. The consultation closed on 26 May 2021. The draft new code consolidates (with updates and amendments) most of the existing codes of practice, including the public service code of practice 14, into a new</p>	No Further Update

Organisation	Item	Details	Status
		<p>online code providing a single up-to-date and consistent source of information. The other codes will be consolidated into the single code at a later date, subject to further consultation.</p> <p>On 17 March 2021, TPR launched its New Code of Practice consultation. The consultation closed on 26 May 2021. The draft new code consolidates (with updates and amendments) most of the existing codes of practice, including the public service code of practice 14, into a new online code providing a single up-to-date and consistent source of information. The other codes will be consolidated into the single code at a later date, subject to further consultation.</p> <p>On 1 September 2020, TPR confirmed that it intends to launch the formal consultation on a single Code of Practice in late 2020 or early 2021.</p> <p>Background:-</p> <p>The Pensions Regulator announced changes to existing codes of practice. The content of the 15 current codes of practice will be combined to form a single shorter code. The changes will reflect the Occupational Pension Schemes (Governance) (Amendment) Regulations 2018. Codes most affected by these regulations will be addressed first, and this includes Code of Practice 14 (public sector schemes). Schemes will need to demonstrate that they have an effective governance system within 12 months of the date the updated codes are published.</p>	
HMT	Consultation on the Increase to the Normal Minimum Pension Age (NMPA)	<p>Latest Update:-</p> <p>On 4 November 2021 The Finance Bill 2021-22 was published setting legislating for the tax charges announced in the budget and formally confirming that the increase to the Normal Minimum Pension Age (NMPA) from 55 to 57 will go ahead in 2028</p> <p>As referenced previously, the issue of whether LGPS members will be able to receive payment of benefits between 55 and 57 via the LGPS Regulations has been raised with DLUHC (formerly MHCLG) by LGA and a response is awaited.</p> <p>On 14 September 2021 a Technical Consultation in relation to the draft legislation published in July 2021 closed.</p>	Updated

Organisation	Item	Details	Status
		<p>Previous Update:-</p> <p>On 20 July 2021, HMT published their response to the consultation on implementing the increase to the normal minimum pension age. The response can be found here. On the same day HMRC published a policy paper and draft legislation which will be introduced as part of the next Finance Bill. This can be found here.</p> <p>Though the Finance Act 2004 will provide for protected pension ages, it will be up to MHCLG whether to allow LGPS members to receive payment of benefits between 55 and 57 via the LGPS Regulations. This issue has been raised with MHCLG by LGA and a response is awaited.</p> <p>On 19 April 2021, the Local Government Pension Committee (LGPC) responded to the consultation on increasing the normal minimum pension age (NMPA). You can read the LGPC response on the non-scheme consultations page of www.lgpsregs.org.</p> <p>On 11 February 2021, HMT published Increasing the normal minimum pension age: consultation on implementation. The consultation, which closes on the 22 April 2021, re-confirms the Government's commitment to increasing the NMPA and seeks views on the implementation of the rise in NMPA and protections for pension scheme members. It proposes that members who have a right under the scheme rules to take benefits before age 57 at the date of the consultation will be protected from the increase in NMPA.</p> <p>Background:-</p> <p>In 2014, the Coalition Government consulted on increasing the normal minimum pension age (NMPA) from 55 to 57 from 6 April 2028 as part of the Freedom and choice in pensions consultation.</p>	

Organisation	Item	Details	Status
DWP	Pensions Dashboard	<p>Latest Update:-</p> <p>In October 2021, there were a number of developments and publications.</p> <ul style="list-style-type: none"> The Pensions Dashboards Programme issued a summary of the key themes emerging from its Staging Call for Input that was issued in July 2021, which had just over 60 respondents. The summary can be found here. It was announced that draft regulations on pension dashboards are expected to be published by the end of 2021 / early 2022. These regulations will set out more details of what data will need to be supplied, how it will need to be supplied and what standards will have to be met. The PDP also published its latest progress report on 26 October 2021, which can be found here, and which recommends Schemes act now to prepare for the dashboard before legislation requires it. <p>Previous Update:-</p> <p>The Fund has now appointed a dedicated officer to oversee the Fund's ongoing responsibilities in relation to the development of the Pensions Dashboard.</p> <p>On 5 July 2021, LGA published its response to the Pensions Dashboards Programme Staging Call for Input. You can read the LGPC response here.</p> <p>On 1 July 2021, TPR published its results from the Public Service Governance and Administration Survey 2020-21, which can be found here. Section 4.10 focussed on Pension Dashboards.</p> <p>On 13 April 2021, the Pensions Dashboards Programme (PDP) issued an invitation to tender for a supplier to provide the digital architecture for pension dashboards. The chosen supplier will provide the main parts of the digital architecture. This will include the pension finder service, the consent and authorisation service and the governance register.</p> <p>In March 2021, the Pensions Administration Standards Association (PASA) published guidance on how to start getting ready for pensions dashboards. This is the first of a series of releases of</p>	Updated

Organisation	Item	Details	Status
		<p>PASA guidance for UK pension schemes, trustees and providers on how to start getting ready for pensions dashboards, see link here.</p> <p>On 15 December 2020, the Pensions Dashboard Programme (PDP) published the key data standards which will underpin pensions dashboards. Data standards provide a common language to describe the pensions information that will be found and displayed on the dashboards. Pension schemes will need to make sure that their data is consistent with the standards, so that members can access this through the dashboards. With onboarding to dashboards expected from 2023, the PDP urges all schemes to start preparing their data now.</p> <p>On 28 October 2020, the Money and Pensions Service (MaPS) published their second Pensions Dashboards Programme progress update report, see link here. The report includes updates on:</p> <ul style="list-style-type: none"> • the Pension Dashboards Programme's (PDP) high level activity plan • resourcing to deliver next phases of the programme • market engagement to help finalise digital architecture requirements • refining requirements for identity verification • setting up a working group to ensure consumer focus • reviewing feedback. <p>The timetable in the report reveals that the PDP expects the dashboard to be available to retirement savers for the first time in 2023.</p> <p>In April 2020, MaPs published two papers:-</p> <ul style="list-style-type: none"> • Pensions Dashboards Data Definitions – Working Paper (which lists the set of data items that could be included in the dashboards data standards. • Pensions Dashboards Data Scope: Working Paper (which looks at options for achieving early breadth of coverage and confirms that initial dashboards will only include information that is already available on annual statements to enable the maximum number of pension schemes to onboard at an early stage. <p>MaPS requested formal feedback on these papers throughout July and August and are currently reviewing the responses received and will give a summary in the autumn.</p>	

Organisation	Item	Details	Status
		<p>Background:-</p> <p>The Pensions Dashboard is an online service which would allow people to see information from multiple pensions all in one place. Following a feasibility study, conducted by DWP, to explore the options for delivering the Pensions Dashboard, the Government launch a consultation in Dec 2018 setting out the findings of the study and their recommendations for dashboards. In April 2019, the government published its response to the consultation outlining the key details of their plan including:-</p> <ul style="list-style-type: none"> • Legislation to compel pension providers to make consumers' data available on the dashboard • Staged onboarding of schemes with the majority of schemes participating within 3 to 4 years • The inclusion of state pension data • A commitment to multiple dashboards, with a non-commercial dashboard being overseen by the Money and Pensions Service (MAPS). <p>MAPS will lead the delivery of the initial phase of the pensions dashboards and will bring together a delivery group made up of stakeholders from across the industry, consumer groups, regulators and government.</p> <p>The DWP advises the pensions industry to get ready, in the next three to four years, to submit data. Compulsion will require primary legislation and the Pensions Minister, Guy Opperman, has indicated his Department's intention to include a Pensions Bill in the next Queen's Speech for this.</p>	
Government	Divorce, Dissolution and Separation Act 2020	<p>On 25 June 2020, the Divorce, Dissolution and Separation Act 2020 received royal assent and will, in the main, come into force on a date to be appointed by Government. The Act will revise the legal process in England and Wales for married couples to obtain divorces and for civil partners to dissolve their civil partnership. It will also update terminology: terms such as “decree nisi”, “decree absolute” and “petitioner” will be replaced with “conditional order”, “final order” and “applicant”.</p>	No Further Update

Organisation	Item	Details	Status
SAB	Responsible Investment	<p>Latest Update:-</p> <p>DLUHC is preparing to issue a consultation on TCFD for the LGPS shortly. (Aside, guidance on asset pooling in the LGPS is also expected.)</p> <p>In October 2021 the All-Party Parliamentary Group on Local Authority Pension Funds recently called on LGPS funds to ensure a “just transition” by mitigating the negative economic and social effects for those currently employed in carbon-intensive industries. The full report can be found here.</p> <p>Previous Updates:-</p> <p>On 8 June 2021, DWP published regulations in parliament to require schemes with £5bn or more in assets, and all authorised master trusts, to report on how they will manage their climate risk from October this year, alongside Guidance for trustees of occupational schemes.</p> <p>These requirements do not however apply to the LGPS. MHCLG will be consulting on regulations which will require similar levels of risk assessment and reporting later this year.</p> <p>On 28 April 2021, Cllr Phillips, Chair of the SAB, announced the launch of the online A-Z guide to Responsible Investment (RI) at the Local Authority RI Seminar. The guide provides a glossary of RI terms, organisations, standards and legislation indexed by its classification (what it is), category (where it fits in Environmental, Social and Governance (ESG)) and status (in the context of the LGPS legislative framework) with related LGPS specific case studies.</p> <p>On 3 March 2021, the newly established Responsible Investment Advisory Group (RIAG) met for the first time. It discussed a wide range of responsible investment related issues, including MHCLG’s proposals for Task Force on Climate-related Financial Disclosures (TCFD) reporting within the LGPS and the response to the LGPS All Party Parliamentary Group’s inquiry into a “Just Transition”. The main role of the group will be to advise the Scheme Advisory Board (SAB) and the Investment Committee on all matters relating to responsible investment. It will also be responsible for assisting the SAB in developing and maintaining the online Responsible Investment A to Z website.</p>	Updated

Organisation	Item	Details	Status
		<p>At the SAB Meeting in February 2021, the Board was advised that work on preparing the responsible investment A to Z website continues. The first milestone, a working version of the website, has been reached and work will now commence on populating the underlying database with relevant items. The aim remains for the website to go live towards the end of March. The Board also agreed membership of the new Responsible Investment Advisory Group (RIAG) as recommended by the investment, governance and engagement committee. The first meeting of the RIAG is scheduled for early March.</p> <p>At the SAB Meeting in May 2020, members were advised that work on preparing an A-Z guide to Responsible Investment will continue over the summer. As agreed in February the guide will not at this stage include any reference to fiduciary duty. The aim is to have a final draft for wider consultation ready to be considered by the Board by mid-August.</p> <p>On 11 May 2020, SAB issued a statement on the Supreme Court boycotts judgement as follows:- 'The SAB welcomes the clarity brought by the judgement of the Supreme Court in the case of R (on the application of Palestine Solidarity Campaign Ltd and another) Appellants) v Secretary of State for Housing, Communities and Local Government (Respondent). In seeking to restrict the outcome as well as the considerations taken account of by an LGPS administering authority when developing its responsible investment policy, the government has been judged to have overstepped its powers. It is the Board's view that Responsible Investment policy decisions belong at the local level reflecting: the need to pay pensions both now and in the future; local democratic accountability and the views of scheme members; and that outcomes of policy developments should not be subject to restrictions based on unrelated matters'.</p> <p>On 24 February 2020, the SAB issued a statement thanking all those who responded to the request for comments on Part 1 of the Responsible Investment draft guidance. They advised that responses have been generally positive, however, some respondents have raised concerns around the issue of fiduciary duty in the context of the LGPS and, in particular, the role and responsibilities of elected members responsible for making investment decisions.</p> <p>The Board is also aware that the issue of fiduciary duty was discussed during the recent case in the Supreme Court involving the Palestine Solidarity Campaign and MHCLG that could shed some light on how the fiduciary duty test applies to investment decision makers in the LGPS.</p>	

Organisation	Item	Details	Status
		<p>More recently, the government has introduced amendments to the Pension Schemes Bill which potentially could have a significant impact on the way in which investment strategy statements are prepared on issues like ESG and climate change.</p> <p>For these reasons, the view is taken that it would be imprudent at this stage to offer any definitive advice or guidance on how the fiduciary duty test applies to investment decision makers in the LGPS. The Board has therefore decided to take stock until it has had the opportunity to evaluate the judgement handed down by the Supreme Court and when more is known about the government's position on the proposed climate change provisions in the Pension Schemes Bill.</p> <p>Notwithstanding this decision, the Board is mindful that there are matters outside of fiduciary duty where advice and information would continue to be helpful. The Board has therefore decided to restructure the proposed guidance to explain and clarify the terminology associated with responsible investment and provide investment decision makers with a range of information, case studies and tools to help them meet the challenges associated with responsible investment. The revised document will be circulated in draft to scheme stakeholders for comment in the normal way.</p> <p>This change of direction will not preclude the Board from addressing the issue of fiduciary duty as a separate issue once the Supreme Court judgement in the foreign boycott case has been handed down and when there is more certainty about the government's proposals under the Pension Schemes Bill.</p> <p>On 3 January 2020, APF issued their response to the consultation.</p> <p>Background:-</p> <p>At the meeting of the Scheme Advisory Board on the 6th November 2019, approval was given for the first part of guidance on responsible investment to be published for consultation. The aim of this first part of RI guidance is to assist and help investment decision makers to identify the parameters of operation within scheme regulations, statutory guidance, fiduciary duty and the general public law and the scope for integrating ESG policies as part of investment strategy statements. The Board wished to make it clear that there is no intention to prescribe the</p>	

Organisation	Item	Details	Status
		<p>extent to which ESG policies must be adopted as this must clearly remain a matter for local consideration and agreement in accordance with MHCLG's statutory guidance.</p> <p>The Board also agreed that work should commence on drafting part two of the guidance, the aim of which is to provide investment decision makers with a toolkit they can use to further integrate ESG policies as part of their investment strategy. As part of the consultation on part one of the guidance, consultees were also invited to submit details of case studies that evidence the successful adoption of ESG policies, in particular, those focused on the risks associated with climate change. Consultees were also invited to suggest other matters that should be included in the part two guidance. The aim will be to have prepared a working draft of the part two guidance in time for it to be considered by the Board when it next meets in February 2020.</p>	

Bath & North East Somerset Council	
MEETING:	LOCAL PENSION BOARD
MEETING DATE:	30 November 2021
TITLE:	PENSION FUND ADMINISTRATION Overview & Summary Performance Report
WARD:	ALL
AN OPEN PUBLIC ITEM	
<p>List of attachments to this report:</p> <p>Appendix 1 – Performance against SLA & Workload</p> <p>Appendix 2 – Annual Summary of Fund Membership Data Quality</p> <p>Appendix 3 – Progress on Key Projects</p> <p>Appendix 3a – Service Plan Monitoring</p>	

1 THE ISSUE

- 1.1 The purpose of this report is to present the Fund's performance for the three months to 30th September 2021 against its key performance indicators (KPI's) in relation to the administration of pension benefits.
- 1.2 The report also addresses the Fund's business operational position from an overall risk perspective

2 RECOMMENDATION

The Pension Board is asked to Note:

- 2.1 Fund performance for the three months to 30th September 2021.

3 COVID-19 AND FUND BUSINESS CONTINUITY

- 3.1 With multiple lockdowns occurring since 23rd March 2020, the Fund focussed on communications, across all relevant stakeholders to monitor and manage business operations remotely.
- 3.2 As the situation continues to evolve it has become clear that there will not be a return to the previous 'normal' office working arrangements with the expectation of a more blended working approach being introduced by the employing authority going forward. With a small exception the majority of officers continue to work remotely from home with limited access to the office.

4 WORKLOAD

- 4.1 **Appendix 1** provides details of APF performance up to the end of the last quarter for KPI's measured against the current SLA. Generally, the Fund continues to operate below its desired target of >90% for most case types (Annex 1) although the case-by-case breakdown (Annex 2) evidences an improvement in critical processes for retirements and death cases from the previous quarter. Overall, however, KPI benchmarking performance has declined over the past year (Annex 3).
- 4.2 Operationally, on the Member Services team there has been an increase in new monthly tasks over the previous 18 months from circa 1,800 to 2,200 tasks per month with the current outstanding cases totalling 4,980 (an increase of 87% since March 2020). The main volume of work is with member refunds, active member retirements and retirements from deferred status. Member estimate requests have increased by 40% over the same period. General enquiries also remain high in volume and a number of these identified as duplicate chasers.
- 4.3 As outlined in the previous quarterly report a project has now been set up to manage the outstanding workload identified in Annex 5. The project will run for a period of 6 months from October to March with the aim being to clear down all 'backlog' cases. At the same time business as usual will continue to be managed. Officers on Member Services team have been divided into project and BAU and will taper across to BAU as the backlog reduces.
- 4.4 Detailed progress on the backlog project will be brought to future Pension Board meetings for noting and comment. The current overall position is set out below

Member Services Backlog Dashboard as at 15/11/2021 06:46:08

Project Start	11/10/2021	Starting Backlog	4,238	Days Allocated	171	Comp Rate (orig)	24.78	Projected End	06/02/2022
Today's Date	15/11/2021	Completed	1,254	Days Elapsed	35	Comp Rate (act)	35.83	Running on Time	
Project End	31/03/2022	Outstanding	2,984	Days Remaining	136	Comp Rate (req)	21.94	% of Work Remaining	61.89%

4.5

5 RESOURCE RECRUITMENT & TRAINING

- 5.1 Recruitment and retention remain a key factor impacting business operations. With a further 2 resignations in the past quarter the administration team is currently carrying 8.5 vacancies across both employer and member services teams in addition the Technical & Compliance post remains unfilled and posts identified to support service transformation are still in development. The team is also carrying four maternity leave absences across the service at this time.
- 5.2 As such the agreed phased recruitment plan is behind schedule as staff movement continues to impact progress. Recruitment continues to backfill vacant posts, maternity cover and secondment to projects and overstaffing is being considered at Assistant Pensions Officer level to mitigate the impact of further staff movement.
- 5.3 To mitigate workload some project work has already been outsourced. In particular; GMP reconciliation project and address tracing project. Further bulk work will be considered for future projects although external resource support is also limited at present due to supplier demand. Mercer consultants continue to provide Technical & Compliance advice and guidance.

6 FIRE PENSION SCHEME – MOU & FRAMEWORK AGREEMENT

- 6.1 On 8th October the Local Government Association (LGA) and Fire Brigade Union (FBU) agreed on a mutually acceptable memorandum of understanding (MOU) and framework (IDF), setting out a mechanism for handling immediate detriment cases, to assist Fire & Rescue Authorities to make immediate detriment payments to members who have retired or are due to retire.
- 6.2 It is for each Fire & Rescue Authority as the relevant scheme manager to adopt the IDF. Avon Fire Authority (AFA) will meet to agree its approach in December 2021.
- 6.3 If the IDF is adopted by AFA this will enable payments to be considered for affected members in advance of the remedying legislation which is expected in October 2023.
- 6.4 Undertaking delivery of the IDF will be a complex matter and will require admin resource with specific technical skills and knowledge to manage. At this time the Fund has initially identified five officers to manage delivery.
- 6.5 Adoption of the IDF will impact business operations as resource is re focussed and work will need to be reprioritised in the short term. Further information will be presented to the Pensions Committee and pension Board as the situation evolves.

7 ANNUAL SUMMARY OF FUND MEMBERSHIP DATA QUALITY

- 7.1 The scheme Actuary has produced a member data overview following the interim valuation see appendix 2. This report compares APF current data position to that of 2017 when Mercer first reviewed the impact of poor data against employer liabilities. Mercer have identified key areas where the Fund held poor or missing data to which we have been able to focus data cleansing projects.
- 7.2 The Employer Services team will be using the 2021 data tool to focus on the main areas of data cleansing in advance of the 2022 valuation. Officers will continue to work with scheme employers to improve member data which will result in both a positive impact on employer costs and improvement in overall accuracy of member information in meeting compliance with TPR requirements.

8 PROGRESS ON KEY PROJECTS

- 8.1 **Appendix 3** provides the current position on a number of key operational projects currently in progress with an outline of further actions to be taken.
- 8.2 This is not a comprehensive list of all strategic admin projects and will be developed going forward to reflect APF expectations measured against those as set out in the service plan.
- 8.3 For completeness **Appendix 3a** outlines the Funds progress against the Service Plan.
- 8.4 Whilst the majority of projects remain in progress and on target some delays have inevitably occurred in other areas and overall strategic objectives will need to be reviewed and recalibrated as the Fund presents the business plan for 2022/2025.

9 RISK MANAGEMENT

- 9.1 The Avon Pension Fund Committee is the formal decision-making body for the Fund. As such it has responsibility to ensure adequate risk management processes are in place. It discharges this responsibility by ensuring the Fund has an appropriate investment strategy and investment management structure in place that is regularly

monitored. In addition, it monitors the benefits administration, the risk register and compliance with relevant investment, finance and administration regulations.

10 EQUALITIES STATEMENT

10.1 A proportionate equalities impact assessment has been carried out using corporate guidelines and no significant issues have been identified.

11 CLIMATE CHANGE

11.1 The Fund is implementing a digital strategy across all its operations and communications with stakeholders to reduce its internal carbon footprint in line with the Council's Climate Strategy. The Fund acknowledges the financial risk to its assets from climate change and is addressing this through its strategic asset allocation to Paris Aligned Global Equities, Sustainable Equities and renewable energy opportunities. The strategy is monitored and reviewed by the Committee.

12 OTHER OPTIONS CONSIDERED

12.1 There are no issues to consider not mentioned in this report.

13 CONSULTATION

13.1 The Report and its contents have been discussed with the Head of Business Finance & Pensions representing the Avon Pension Fund and Service Director – One West representing the administering authority.

Contact person	<i>Geoff Cleak, Pensions Manager; Tel 01225 395277</i>
Background papers	<i>Various statistical documents.</i>
Please contact the report author if you need to access this report in an alternative format	

Annex 1 Overall Performance by Case Type

		Cases Last Quarter				
		Measured Against SLA				
		Total Processed	Total Processed in Target	Percentage Processed within Target	Total Processed within 5 days of Target	Percentage Processed within 5 days of Target
Retirement (from Active)	Quote - 15 days	273	123	45.05%	49	63.00%
	Payment - 15 days	238	208	87.39%	24	97.48%
Retirement (from Deferred)	Quote - 30 days	92	29	31.52%	8	40.22%
	Payment - 15 days	246	204	82.93%	22	91.87%
Deaths	Notification - 5 days	95	89	93.68%	4	97.89%
	Payment - 10 days	88	86	97.73%	2	100.00%
Refund of contributions	Quote - 10 days	179	17	9.50%	5	12.29%
	Payment - 10 days	46	30	65.22%	3	71.74%
Deferred (early leavers)	30 days	339	223	65.78%	116	100.00%
Transfers In	Quote - 10 days	147	2	1.36%	1	2.04%
	Payment - 10 days	62	1	1.61%	1	3.23%
Transfers Out	Quote - 10 days	158	16	10.13%	22	24.05%
	Payment - 10 days	11	7	63.64%	0	63.64%
Estimates	Member - 15 days	173	152	87.86%	6	91.33%
	Employer - 15 days	51	39	76.47%	2	80.39%
Divorce	Quote - 45 days	66	62	93.94%	0	93.94%
	Actual - 15 days	0	0	100.00%	0	100.00%
Starters	40 days	1960	1919	97.91%	0	97.91%
		4224	3207	75.92%	265	82.20%


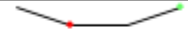
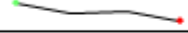
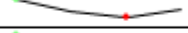


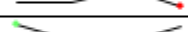

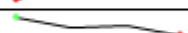










RAG key	
Red	Less than 75%
Amber	75 - 89%
Green	90 - 100%

Annex 2
Case No's vs Target

		Tasks Last Quarter							
		Average Days to Process							
			Actual Days to Process						
			0 - 5	6 - 10	11 - 15	16 - 20	21 - 25	26 - 30	31+
Retirement (from Active)	Quote - 15 days	12	51	45	27	49	39	31	31
	Payment - 15 days	8	131	36	41	24	5	1	0
Retirement (from Deferred)	Quote - 30 days	10	37	6	8	6	11	7	17
	Payment - 15 days	9	128	41	35	22	12	7	1
Deaths	Notification - 5 days	11	89	4	1	0	0	0	1
	Payment - 10 days	5	78	8	2	0	0	0	0
Refund of contributions	Quote - 10 days	32	14	3	5	5	2	13	137
	Payment - 10 days	15	24	6	3	4	4	2	3
Deferred (early leavers)	30 days	13	22	6	36	49	49	61	116
Transfers In	Quote - 10 days	25	1	1	1	1	1	9	133
	Payment - 10 days	36	0	1	1	1	0	6	53
Transfers Out	Quote - 10 days	39	7	9	22	27	33	4	56
	Payment - 10 days	20	4	3	0	1	0	0	3
Estimates	Member - 15 days	12	88	53	11	6	7	5	3
	Employer - 15 days	7	22	9	8	2	3	4	3
Divorce	Quote - 45 days	23	11	12	10	7	10	6	10
	Actual - 15 days	0	0	0	0	0	0	0	0
Starters	40 days	24	805	101	54	35	13	40	73

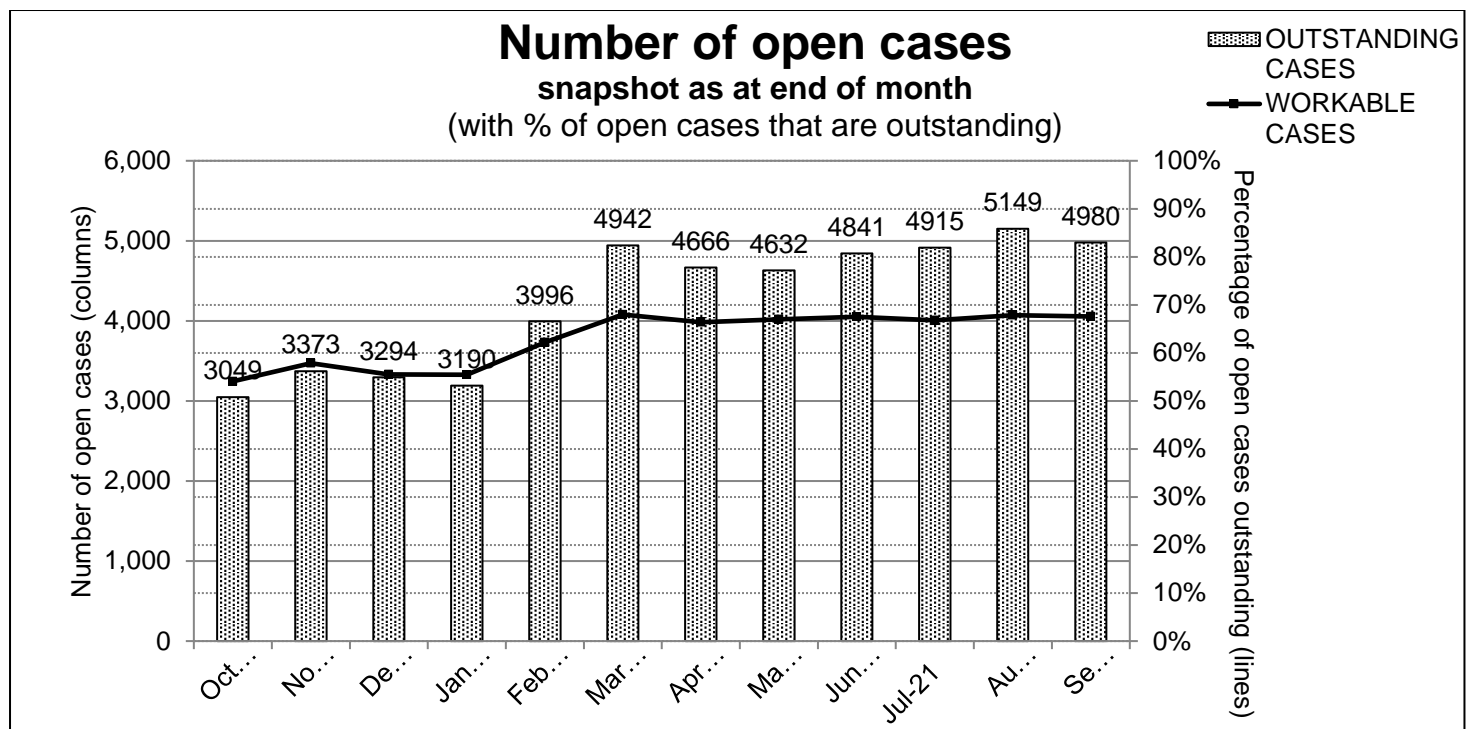
RAG key	Processed
Red	More than 5 days over target
Amber	Within 5 days of target
Green	Within target

Annex 3 Trend in Overall Performance

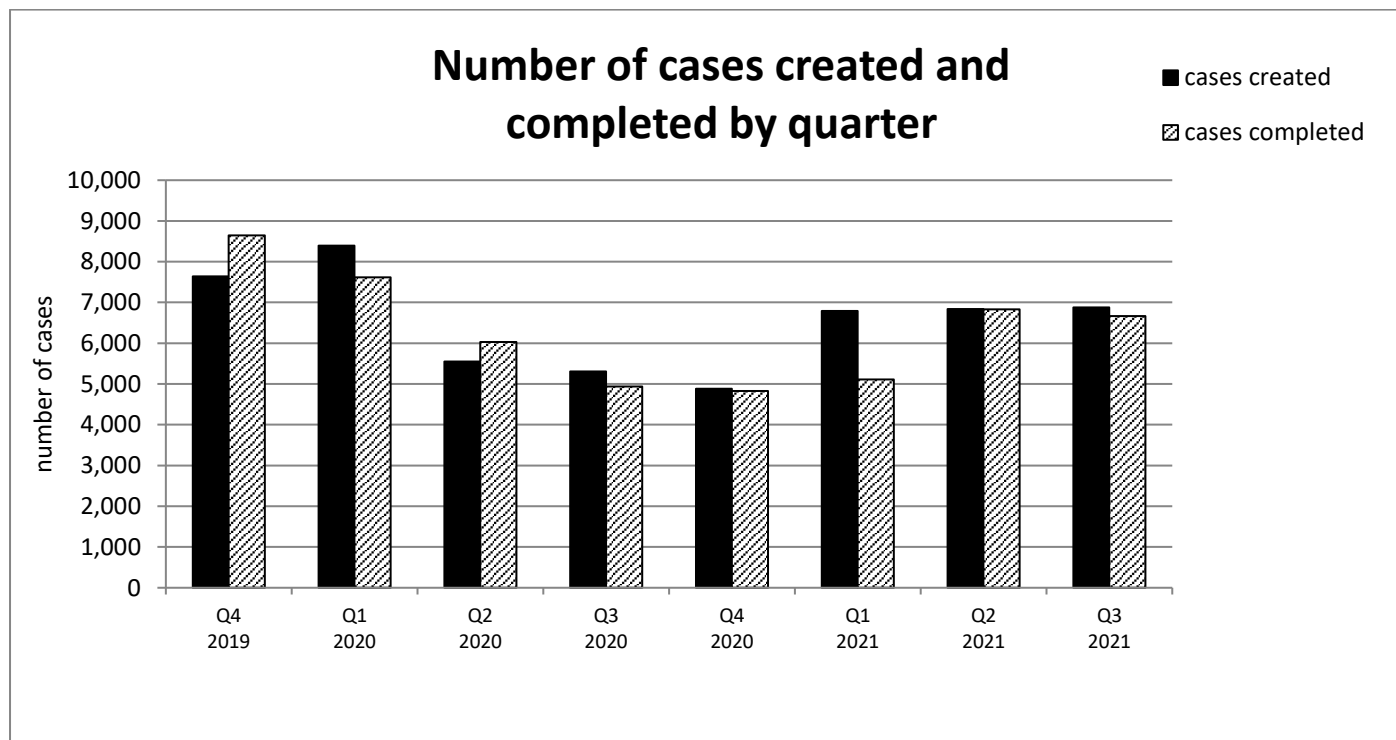
SLA Standards for Processing Admin Tasks						
Work Type	Target Processing SLA (Old/New)	Q4 Oct 20 - Dec 20	Q1 Jan 21 - Mar 21	Q2 Apr 21 - Jun 21	Q2 3 Jul 21 - Sept 21	Trend
Retirement (from Active)	Quote - 5 / 15 days	80.88%	71.26%	55.26%	45.05%	
	Payment - 5 / 15 days	86.24%	75.54%	76.39%	87.39%	
Retirement (from Deferred)	Quote - 30 days	64.94%	45.78%	50.00%	31.52%	
	Payment - 5 / 15 days	95.09%	80.34%	74.03%	82.93%	
Deaths	Notification - 5 days	100.00%	93.13%	87.91%	93.68%	
	Payment - 5 / 10 days	97.78%	84.38%	80.00%	97.73%	
Refund of contributions	Quote - 10 days	14.06%	14.69%	28.57%	9.50%	
	Payment - 10 days	71.43%	32.86%	24.37%	65.22%	
Deferreds (early leavers)	Notification - 20 / 30 days	24.92%	73.40%	65.56%	65.78%	
Transfers In	Quote - 10 days	81.82%	36.14%	41.91%	1.36%	
	Payment - 10 days	62.50%	12.24%	28.57%	1.61%	
Transfers Out	Quote - 10 days	14.58%	4.80%	10.00%	10.13%	
	Payment - 10 days	53.33%	62.50%	47.06%	63.64%	
Estimates	Member - 10/15 days	76.24%	69.41%	45.99%	87.86%	
	Employer - 15 days	85.71%	78.57%	68.97%	76.47%	
Divorce	Quote - 45 days	90.91%	91.03%	90.48%	93.94%	
	Actual - 15 days	100.00%	100.00%	100.00%	100.00%	
Starters	40 days	71.21%	82.49%	72.53%	97.91%	
Total Cases Processed		2319	5167	4425	4224	

RAG key	
Red	Less than 75%
Amber	75 - 89%
Green	90 - 100%

Annex 4



Annex 5



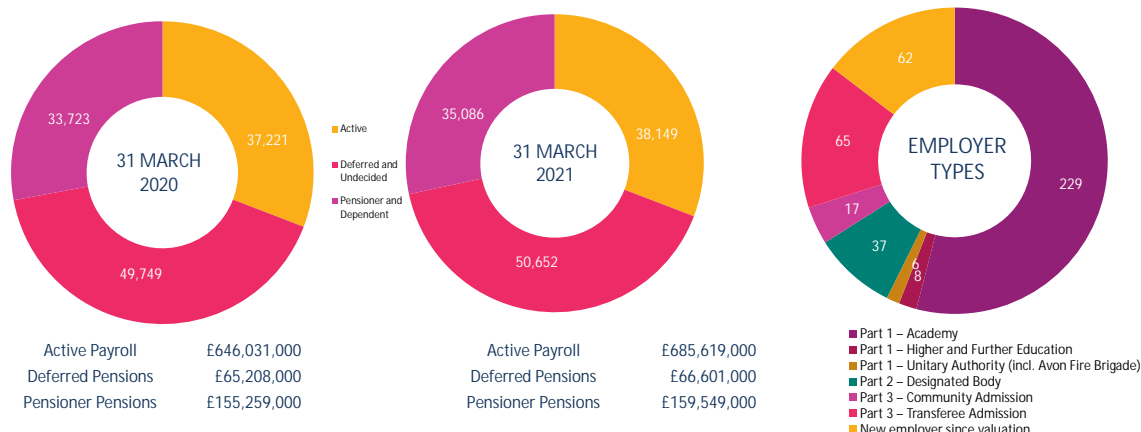
AVON PENSION FUND



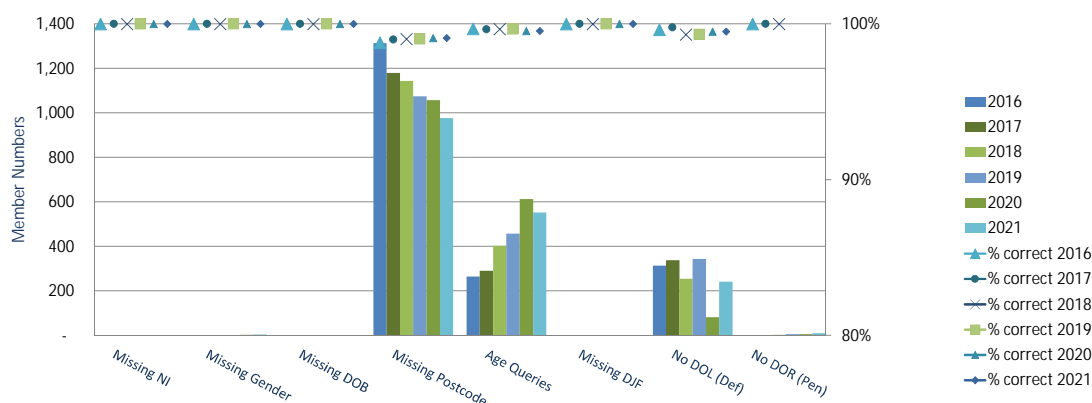
ANNUAL SUMMARY OF FUND MEMBERSHIP DATA QUALITY

STATISTICS

This report shows the movement in the Fund's data from when it was first reported on in 2017 against this year's interim valuation data as at 31 March 2021. The charts below show continuous growth in the Fund over the last 12 months and a significant increase of 62 new employers since the last valuation in 2019. The liability impact table below shows the financial impact of missing or incorrect data and the direct cost to scheme employers. Since 2017, the Fund has managed to achieve a reduction in the overall pension liabilities for employers of over £30 million. Page 2 shows a breakdown of the main data areas that have the largest impact on liability. The Employer Services team will be using the data from the 2021 report to target data areas that are causing a significant impact on liability and smaller employers with poor data.



COMMON DATA

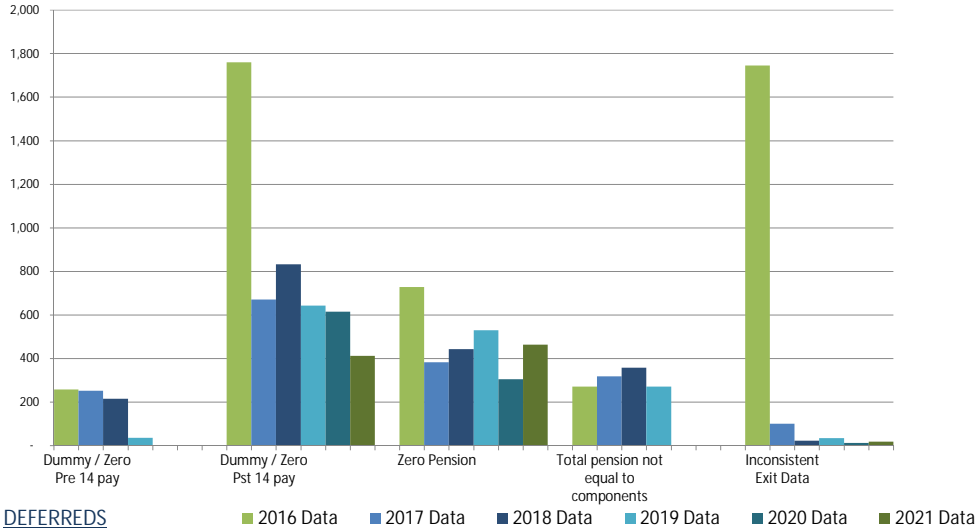


LIABILITY IMPACT

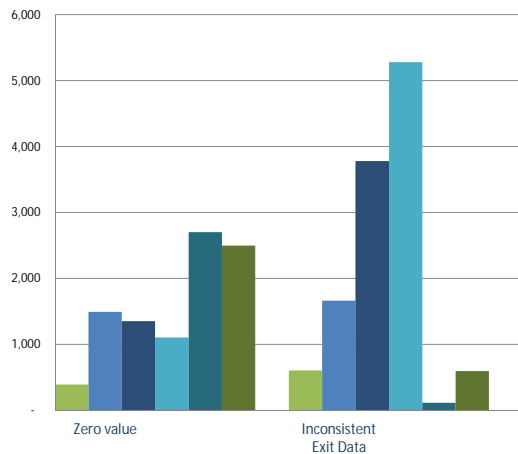
Where data is missing or incorrect (i.e. pension, salary, lump sum, spouses etc), the Actuary is required to estimate this data. A prudent approach will be taken to estimations and this will therefore impact on the liabilities and hence the deficit contributions paid by employers each year. An illustration of the potential impact based on the data provided is shown below:

	Active Data Issues	Deferred Data Issues	Pensioner Data Issues	2021 Total Impact	2017 Total Impact	Improvement / Deterioration
Additional liabilities	£6,709,000	£9,545,000	£13,540,000	£29,794,000	£59,826,000	-£30,032,000
Impact on deficit contributions	£524,180	£745,760	£1,057,890	£2,327,830	£3,943,980	-£1,616,150

ACTIVES



DEFERREDS

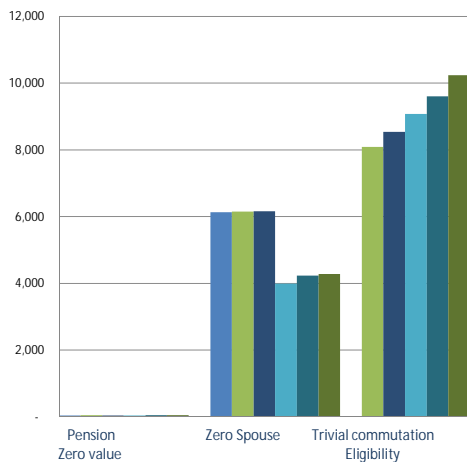


These charts show data improvement in key areas that the Actuary identified for data cleansing and a continuous data improvement across active members.

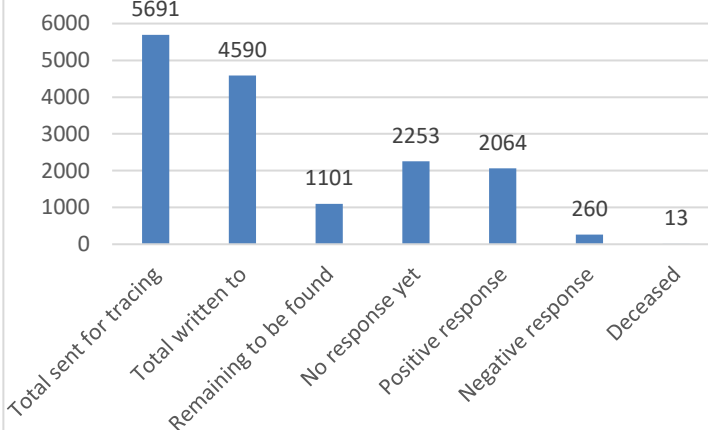
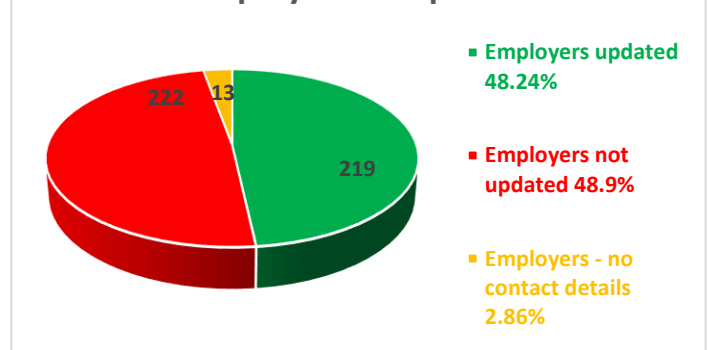
Deferred members with a zero pension includes 'undecided' members where the pension has not yet been calculated and members who are awaiting a refund of contributions.

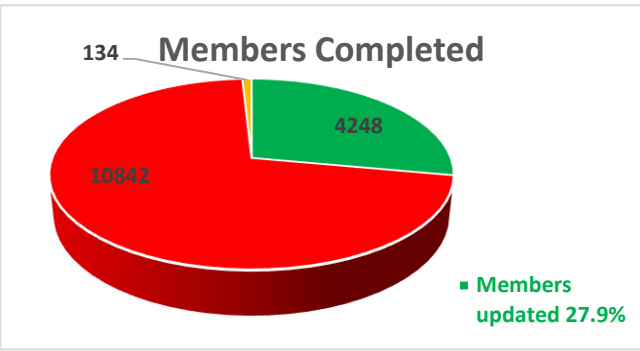
The Fund will be working on these areas to reduce actuary assumptions.

PENSIONERS



This chart shows the number of pensioner members who may have eligibility to commute 'trivial' scheme pension for pension lump sum. The Fund will be undertaking a future project to communicate options to affected members and this will follow completion of the current GMP reconciliation and rectification project. Member benefit trivialisation will impact scheme employer liability.

Item	Details	Action by Fund / Next Steps																
Address Tracing	<p>Tracing Project 2020/2021</p>  <table> <tr> <th>Stage</th> <th>Count</th> </tr> <tr> <td>Total sent for tracing</td> <td>5691</td> </tr> <tr> <td>Total written to</td> <td>4590</td> </tr> <tr> <td>Remaining to be found</td> <td>1101</td> </tr> <tr> <td>No response yet</td> <td>2253</td> </tr> <tr> <td>Positive response</td> <td>2064</td> </tr> <tr> <td>Negative response</td> <td>260</td> </tr> <tr> <td>Deceased</td> <td>13</td> </tr> </table> <p>Total tracing project costs from Mercer to date: £23,909.00</p>	Stage	Count	Total sent for tracing	5691	Total written to	4590	Remaining to be found	1101	No response yet	2253	Positive response	2064	Negative response	260	Deceased	13	<p>The members that have been written to but no response received have been sent a reminder letter in October 2021 and replies are starting to be received.</p> <p>The members that have not been found by the first 2 levels of tracing will shortly be sent to the tracing agency (via Mercer) for a third and final “premium batch” trace service. The fee for this higher level of search is £8 plus VAT on a no find no fee basis. This will be the last stage of the tracing project with Mercer.</p> <p>New “gone away” cases will be treated under a business-as-usual process, with the Fund carrying out the first stage of tracing followed by referral to the tracing agency for batch tracing.</p> <p>After this 3rd level of tracing a process will be agreed in place to deal with untraced members and to review cases again at Normal Pension Age.</p> <p>Tracing pension members and keeping member addresses up to date is a key requirement of the TPR and data cleansing must continue to form part of our BAU processes.</p>
Stage	Count																	
Total sent for tracing	5691																	
Total written to	4590																	
Remaining to be found	1101																	
No response yet	2253																	
Positive response	2064																	
Negative response	260																	
Deceased	13																	
McCloud	<p>Employers Completed</p>  <table> <tr> <th>Category</th> <th>Count</th> <th>Percentage</th> </tr> <tr> <td>Employers updated</td> <td>219</td> <td>48.24%</td> </tr> <tr> <td>Employers not updated</td> <td>222</td> <td>48.9%</td> </tr> <tr> <td>Employers - no contact details</td> <td>13</td> <td>2.86%</td> </tr> </table>	Category	Count	Percentage	Employers updated	219	48.24%	Employers not updated	222	48.9%	Employers - no contact details	13	2.86%	<p>The initial project started in December 2020 and to date we have completed data collection for just under 50% of our employers. The membership completed number is proportionately lower as we have seen returns in the main from smaller employers. The 2 largest employers that require data remedy are yet to make a data return which covers just over 7000 members. We are working with these UA's to ensure they make data returns by 31/12/2021.</p> <p>Regulation's timeline:</p> <ul style="list-style-type: none"> Regs are currently proceeding through Parliament and are expected in early 2022. 				
Category	Count	Percentage																
Employers updated	219	48.24%																
Employers not updated	222	48.9%																
Employers - no contact details	13	2.86%																

	 <p>Members Completed</p> <p>134</p> <p>10842</p> <p>4248</p> <p>■ Members updated 27.9%</p>	<ul style="list-style-type: none"> • Consultation on draft guidance Summer 2022 • Final guidance to be issued Autumn 2022 • Remedy regulations due to come into force Spring 2023 <p>Next steps:</p> <p>Chase employers not yet returned/include communication with FD's</p> <p>Complete all data collection by 31st December 2021</p> <p>Upload data and deal with queries by 31st March 2022</p> <p>Consider requirements and resource for remedy in preparation for regulations.</p> <p>Consider how to deal with exited or insolvent employers</p> <p>Consider how to deal with transfers</p>
i-Connect – Monthly Data Returns	<p>Scheme Totals Employers with active Members (including maintained schools who outsource payroll) – 465 Active members as of October 2021 - 42249</p> <p>Current IC Totals Employers on IC – 273 (58% of Employers) Employers targeted for IC – 192 (42% of Employers) Active Members covered by IC – 33816 80% of active membership covered by IC (figures as at 7/10/2021)</p>	<p>Since Year End progress has been made to push all small employers to use Online Returns within IC. We now have 100 employers using online returns.</p> <p>The i-Connect team leader has begun spending 2 focused days per week on the project with the following 4 aims:</p> <ul style="list-style-type: none"> • All employers to by using i-Connect • Hand back loading of data via the portal via IC to employers • Fully utilise all IC tools including dashboard • Roll out the IC document portal to all IC users

		<p>Employer engagement has been low with the project therefore a more focused approach is being taken with the project however BAU must also be a main priority for the IC team.</p> <p>We identified 19 groups of employers including payroll providers to onboard, 4 of which would cover the majority of our active membership. These 4 groups (payroll providers) are now the focus of the project for extract development and onboarding.</p>

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Appendix 3 - Service Plan Monitoring Dec 2021			
Key Objectives	Tasks	Completion Date	Status
ADMINISTRATION STRATEGY			
COMMUNICATION			
Member digital engagement	Activate online ABS availability - deferreds	Jul-21	Complete
	Activate online ABS availability - Actives	Aug-22	In progress
	Strategy to Maximise MSS take up	Mar-22	In progress
IT STRATEGY			
Improvements			
Progress full employer electronic data delivery	Completion of i-connect project	Mar-22	In progress behind schedule
Development			
Progress software developments with Heywood	Development of online leaver form	Mar-22	Complete
	Review processes to use portal and roll out to ER's inc training	Mar-22	On hold
	Enhanced secure 2 way portal functionality	Mar-22	In progress behind schedule
	Iconnect reporting - Dashboard in place and development of pre load data validation in progress	Mar-22	Complete
	Hand back loading of files to ER's with tolerance limits	Mar-22	In progress
RECRUITMENT & TRAINING			
Recruitment	Project to fill app 10 posts across Member & Employer Services	Jun-21	In progress behind schedule
Training & development plan	Introduce staff training programme covering operational & digital transformation requirements	Mar-22	In progress
OTHER PROJECTS			
Revise Fire Service model	Develop revised service offer and SLA	Mar-22	In progress
Data improvement	Address Rectification	Mar-22	In progress
	Care Roll up	Mar-23	Complete
McCloud	Data collection exercise LGPS		In progress
	Implementation of remedy - Fire	Oct-23	On hold
	Implementation of Immediate Detriment - Fire	Jul-21	In progress
	Implementation of MOU & ID Framework Agreement	Dec-01	In planning
	Implementation of remedy - LGPS	Mar-23	In progress
LGPS Cost Cap Mechanism	Preparation required in case of backdated implementation	TBA	In planning

GMP data reconciliation project	Data match exercise with HMRC to mitigate risk of pension overpayment – GMP Rectification of identified cases	Mar-22	In progress
Processing Backlogs	To clear outstanding task work set at 'Reply Due' (4000 cases)	Mar-22	In progress behind schedule
Pensions Dashboard	To enable Pension Dashboard Compliance	Dec-23	In planning
Internal Dispute Resolution Policy	Review general complaints process prior to IDRP and incorporate learning into processes	Dec-21	In progress
NEW ADMIN STRATEGY	Service plan & budget to committee	Mar-21	Complete
	Develop new strategy document & committee approval	Mar-22	In planning
	Consultation & implementation	Jun-22	In planning
DIGITAL TRANSFORMATION PROJECT	Review structure & recruit Digital Transformation Manager	Mar-22	In progress
	Gap analysis & specification for digital requirements	Mar-22	In progress
	Revise Communications Strategy	Mar-22	In planning
	Staff training & development plan for digital transformation	Mar-22	In planning
	Procurement process for pension system	Dec-22	In planning
	System implementation	Dec-23	In planning
	Develop control framework	Mar-24	In planning
	Implement Digital Office to better support staff	Mar-24	In planning
	Channel shift to enable support & consultancy to members & employers	Mar-24	In planning
FUNDING STRATEGY			
Covenant assessment of employers during valuation period	Establish policy for monitoring employer covenant between valuations: rolling timetable for reviewing employers; collection and collation of data; identifying higher risk employers for closer monitoring.	Jun-21	Complete
	Explore options with employers to mitigate covenant risks	ongoing	In progress
Valuation and FSS	Interim review, identify issues to be considered in 2022 valuation	Oct-21	Complete
	Update policies for changes in regulations	Mar-21	In progress
Actuarial advisory contract retender	Procure using National Framework	Oct-21	In progress
Review AVC arrangements	Review range of investment choices for members – high level review by advisor to meet governance requirement	2022/23	In planning
	Further work to decide on any changes.	2022/23	In planning
Funding Communications Strategy	Agree strategy primarily for employers	Jun-21	In progress behind schedule
	o Website	ongoing	In progress

	o Forums/ meetings	ongoing	In progress
Recruitment	Review resource requirements of Team	Mar-22	In planning
INVESTMENT STRATEGY			
Transition of assets	Input as member of Brunel Client Group	Ongoing	In progress
	Monitor Avon plan for transitioning assets based on Brunel plan	Ongoing	Complete
Review of equity allocations	Assess potential to invest all equity assets in sustainable and paris aligned strategies	Dec-21	Complete
Review investment Strategy and appropriate risk level	Post interim valuation review risk appetite required to meet funding objective	Mar-22	In progress
Monitor risk management strategies ensuring collateral managed efficiently and decisions taken in timely manner	Liaise with Mercer and Blackrock as to exposures, trigger points and monitoring framework	Ongoing	In progress
	Annual review of trigger points and strategy	Annually 3Q	In progress
	Arrange Panel & committee training as needed	ongoing	In progress
Climate Change disclosures	TCFD: Report in line withh TCFD recommendations for 2020/21 year end reports	Sep-21	In progress
	IIGCC: report in line with asset owner commitment	Sep-21	In progress
Review of Responsible Investing Policy	Review policy as to effectiveness and incorporate new initiatives post transition of assets , when Brunel service offering more developed	2022/23	In planning
CMA Order Compliance Statement	Prepare compliance statement and process for monitoring Investments Consultant	30/11/21	In progress
FRC Stewardship Code	Prepare compliance statement	01/12/21	Complete
Team Resources	Appoint Senior Investment Officer	2021	In planning
	Consider team structure post asset transition	2022	In planning
Investment Communications Strategy	Agree strategy across all stakeholders	ongoing	In progress
	o Website	ongoing	In progress behind schedule
	o Newsletters	ongoing	In progress
	o Forums/ meetings	ongoing	In progress behind schedule
GOVERNANCE & FINANCE			

Review governance arrangements following Good Governance Review & the pooling of assets	Review ToR of Committee and Investment Panel	Jun-21	Complete
	Review Governance Compliance statement	Jun-21	Complete
	Conflicts of Interest Policy	Mar-22	In planning
	Policy on Committee Representation	Mar-22	In planning
	Training policy	Mar-22	In planning
	R&R matrix	Mar-22	In planning
	Cyber security	Mar-22	In progress
	Review disaster recovery / business continuity plan	Mar-22	In progress
	Document process for dealing with ineffective pension boards	Mar-22	In planning
Reporting to Avon Pension Fund Pension Board and Fire Service Pension Board	Support Board, education and training needs as required	Ongoing	In progress
Training Plan for Committee & Board members	Plan annual training programme for members	Annually in June	In progress
Committee & Pension Board	Review papers and content that go to committee and set up library on Modern Gov	Mar-22	In progress
Recruitment for Pension Board	new member & employer rep required	Sep-21	Complete
Independent Members on Committee	Appoint Independent Member. Terms end 2Q22 (end of 2nd term for one member)	Apr-22	In progress
GDPR	Ensure ongoing compliance with regulations	ongoing	In progress
Improve Financial reporting to management team	Prepare standard monthly /quarterly reports	Dec-21	In progress

Bath & North East Somerset Council		
MEETING:	LOCAL PENSION BOARD - AVON PENSION FUND	
MEETING DATE:	30 November 2021	AGENDA ITEM NUMBER
TITLE:	Breaches Report	
WARD:	ALL	
AN OPEN PUBLIC ITEM		
List of attachments to this report: Appendix 1 - Summary of Breaches Log Appendix 2 - Breaches Policy		

1. THE ISSUE

- 1.1. The purpose of this report is to update the Pension Board on the Fund's Breaches Policy, procedure for recording & reporting breaches, training carried out for Teams and breaches recorded in the last year.

2. RECOMMENDATION

- 2.1. That the Board notes the report.

3. FINANCIAL IMPLICATIONS

- 3.1. There are no direct implications related to the Pension Board in connection with this report.

4. REPORT

4.1. REGULATORY BREACHES

- 4.2. The introduction of the Pensions Act 2013 extended the powers of the Pensions Regulator (TPR) to public sector schemes from 1 April 2014. The Pension Regulator introduced the Code of Practice 14 for the administration of public sector schemes in 2015. This, amongst other things, addressed the issue of Regulatory Breaches and reporting requirements.

- 4.3. Regulatory breaches are breaches of the regulations or standards as set out in the Administration Strategy and if Material need to be reported to TPR as set out in the Breaches Policy (Appendix 2).

- 4.4. In addition to the requirement to report Material breaches to TPR, the Pensions Manager will formally report all breaches to the Avon Pension Fund Committee and the Pension Board on a quarterly basis, notifying the chairs of both of any significant issues as appropriate

- 4.5. In deciding whether a breach is likely to be of material significance to the Pensions Regulator, the following should be considered:

- cause of the breach;
- effect of the breach;
- reaction to the breach; and
- the wider implications of the breach

4.6. Breaches recorded by the Fund broadly fall into the following categories:

- Employer fines due to late or incorrect year end returns
- Employer fines for disproportionate work
- Employer late payments of contributions
- APF failing to meet statutory requirements eg not issuing ABSs on time
- Non-payment of refunds within 5 years*

4.7. Breaches are recorded on the breaches log and referred to the Pensions Manager if considered material. If Material TPR's online portal is used to report the breach.

4.8. Outcomes and improvements from breaches are agreed and implemented accordingly with employers or officers as appropriate.

4.9. A summary of regulatory breaches recorded for the period October 2020 to September 2021 can be found in Appendix 1. There were no material breaches recorded in this period.

4.10. 5 Year Refund Cases*

The 2013 LGPS regulations require schemes to pay a refund of contributions within 5 years. Failure to complete payment is classified as a regulatory breach and is required to be reported to the pensions committee and local pension board. The National Technical Group has previously made a recommendation to the Scheme Advisory Board (SAB) to remove the requirements to pay a refund of contributions within five years under the 2013 regulations. The SAB have agreed to proceed with this regulatory change and are in the process of making recommendations to DLUHC.

5. DATA PROTECTION BREACHES

5.1. The General Data Protection Regulations (GDPR) came into force with effect from 25th May 2018 and replaced the earlier Data Protection Act of 1998.

5.2. A personal data breach means a breach of security leading to the accidental or unlawful destruction, loss, alteration, unauthorised disclosure of, or access to, personal data. This includes breaches that are the result of both accidental and deliberate causes.

5.3. A notifiable breach must be reported to the Information Commissioner's Office (ICO) within 72 hours after becoming aware of it. If it takes longer than this, reasons for the delay must be provided.

5.4. All breaches must be reported to Banes Data Protection Officer (DPO) within 24 hours of the incident using the incident reporting template. The DPO will advise if the incident meets the criteria for reporting to the ICO and also makes recommendations on future preventative actions.

5.5. A summary of data breaches reported to Banes DPO between November 2020 and October 2021 can be found in Appendix 1. No incidents were reported to the ICO during this period.

5.6. Procedures are in place for staff to follow and regular training takes place to ensure that everyone has a full understanding of data protection and the reporting procedure for breaches. Recent staff training has included:

- GDPR E-Learning Induction & refresher courses
- Cyber Security E-Learning
- Data Protection Induction Session including homeworking tips
- Data Breaches – case studies
- How to recognise a data breach, Subject Access Request & Freedom of Information Request

5.7. A GDPR project plan has been in place since 2018 in order to ensure compliance with the new regulations. Work is ongoing and an update will be provided to the Board.

6. RISK MANAGEMENT

6.1. The Avon Pension Fund Committee is the formal decision-making body for the Fund. As such it has responsibility to ensure adequate risk management processes are in place. It discharges this responsibility by ensuring the Fund has an appropriate investment strategy and investment management structure in place that is regularly monitored. In addition, it monitors the benefits administration, the risk register and compliance with relevant investment, finance and administration regulations.

7. EQUALITIES

7.1. A proportionate equalities impact assessment has been carried out using corporate guidelines and no significant issues have been identified.

8. CLIMATE CHANGE

8.1. The Fund is implementing a digital strategy across all its operations and communications with stakeholders to reduce its internal carbon footprint in line with the Council's Climate Strategy. The Fund acknowledges the financial risk to its assets from climate change and is addressing this through its strategic asset allocation to Paris Aligned Global Equities Sustainable Equities and renewable energy opportunities. The strategy is monitored and reviewed by the Committee.

9. CONSULTATION

1.1 Reports and its contents have been discussed with the Head of Business Finance & Pensions representing the Avon Pension Fund and Service Director – One West representing the administering authority.

Contact person	Carolyn Morgan - Governance & Risk Advisor – 01225 395240
Background papers	
Please contact the report author if you need to access this report in an alternative format	

Breaches Log - 2020 / 2021

Appendix 1

Type of Breach	Number of Incidents	Summary of breach	Detail	Outcomes & Improvements
Regulatory Breaches Oct 20 to Sept 21				
Employer Late Payers	17	Late or non payment of contributions	6 employers have been late for more than 2 consecutive months. All but one has been resolved.	Support / training for employers
Employer Year End Data	20	Incorrect member data	Incorrect data supplied on iConnect throughout the year and at YE	Fine issued & training
5 Year Refund Breaches	415	Unable to pay refund within 5 year deadline	This was due either to no response from members or being unable to trace members	Address tracing project continues
Other Breaches	1	Disclosure	Pensions savings statement not issued to member for 2 years running resulting in member being unaware of tax charges	Process review
Data Breaches Nov 20 to Oct 21				
Reported to Information Governance	10	2 x incorrect addresses 2 x enveloping 3 x My Pension Online 1 x Employer Self Service	Employer provided incorrect address Member received own plus another member's benefit details Email address added to wrong member record & activation key sent which allowed member to access another member's record Email template updated incorrectly in upgrade to include member details rather than just acknowledgement Report ran by employer contained all active members rather than just employer's members	Process review /Employer training Staff awareness / training Resource considerations / process review Additional steps added to acceptance testing plan Report has been disabled

		1 x Globalscape 1 x email	Member details sent to wrong employer Additional recipient copied into email containing Password protected file and password	Staff awareness/training Process review / training
Reported to ICO	0			

Avon Pension Fund Breaches Procedure

March 2016

1. Procedure for the review and reporting of Regulatory Breaches

The introduction of the Pensions Act 2013 extended the powers of the Pensions Regulator to public sector schemes from 1 April 2014. The Pension Regulator introduced Code of Practice 14 for the administration of public sector schemes in 2015. This, amongst other things, addressed the issue of Regulatory Breaches and reporting requirements.

This document deals with the process of identifying, recording and determining if breaches of pension regulations should be reported to the Pension's Regulator.

2. The Duty to report – legal requirement

The duty to report breaches is contained within the Pensions Act 2004 section 70. Within this Act certain people have a legal duty to report breaches to the Pensions Regulator where they believe that:

- a legal duty relevant to the administration of the scheme hasn't been or isn't being complied with: this could relate for instance to keeping records, internal controls, calculating benefits and, for funded schemes, includes investment governance and administration matters
- the failure to comply is likely to be of 'material significance' to the regulator in the exercise of its functions.

The people with a legal duty to report are

- pension board members
- any other person involved in the administration of the scheme (which includes Committee members)
- employers
- professional advisers including auditors, actuaries, legal advisers and fund managers
- any other person involved in advising the scheme manager in relation to the scheme

The duty to report overrides other obligations, such as confidentiality, except where legal professional privilege applies. Failure to report a breach without reasonable excuse, can lead to civil penalties.

3. What is a breach of the law?

- A breach of the law is “an act of breaking or failing to observe a law, agreement, or code of conduct.” In the context of the Local Government

Pension Scheme (LGPS) it can encompass many aspects of the management and administration of the LGPS, including failure:

- to do anything required under the Regulations;
- to do anything required under overriding legislation, applicable statutory guidance or codes of practice;
- to maintain accurate records;
- to act on any fraudulent act or omission that is identified;
- to comply with policies and procedures (e.g. the Fund's statement of investment principles, funding strategy, discretionary policies, etc.);
- of an employer to pay over member and employer contributions on time;
- to pay member benefits either accurately or in a timely manner;
- to issue annual benefit statements on time or non-compliance with the Code.

For breaches to be reported to the Pensions Regulator they need to be of **material** significance and specifically would include;

- dishonesty
- poor governance or administration
- slow or inappropriate decision making practices
- incomplete or inaccurate advice, or
- acting (or failing to act) in deliberate contravention of the law
- pension board members not having the appropriate degree of knowledge and understanding, which may result in pension boards not fulfilling their roles, the scheme not being properly governed and administered and/or scheme managers breaching other legal requirements
- pension board members having a conflict of interest, which may result in them being prejudiced in the way that they carry out their role, ineffective governance and administration of the scheme and/or scheme managers breaching legal requirements
- adequate internal controls not being established and operated, which may lead to schemes not being run in accordance with their scheme regulations and other legal requirements, risks not being properly identified and manage and/or the right money not being paid to or by the scheme at the right time
- accurate information about benefits and scheme administration not being provided to scheme members and others, which may result in members not being able to effectively plan or make decisions about their retirement
- appropriate records not being maintained, which may result in member benefits being calculated incorrectly and / or not being paid to the right person at the right time
- pension board members misappropriating any assets of the scheme or being likely to do so, which may result in scheme assets not being safeguarded,
- where a breach has been identified and those involved do not take prompt and effective action to remedy the breach and identify and tackle its cause in order to minimise risk of recurrence; are not pursuing corrective action to a proper conclusion, or fail to notify affected scheme members where it would have been appropriate to do so.

Breaches can therefore include failure to adhere to requirements set out by Administering Authority to support the maintenance of records requirements or policy or procedural requirements.

4. Material Significance

In deciding whether a breach is likely to be of material significance to the Pensions Regulator, the following should be considered:

- cause of the breach;
- effect of the breach;
- reaction to the breach; and
- the wider implications of the breach

When deciding whether to report, those responsible should consider these points together. Reporters should take into account expert or professional advice where appropriate, when deciding whether the breach is likely to be of material significance to the Regulator.

5. Recording of Breaches

The **Pensions Manager** is responsible for maintaining a record of all breaches including those which are not reported to the Regulator. The templates for recording breaches are attached as follows:

- Appendix 1: Breaches caused by employer
- Appendix 2: Breaches caused by APF as administrator
- Appendix 3: Material Breaches

Given the scope of potential breaches and the complexity of LGPS administration for Employers and the Administering Authority it is necessary to take a pragmatic approach to remediation of non- material breaches based on support, training and guidance together with remedies available to the Fund through its Administration Strategy.

6. Resolution of non- material Employer breaches

Many non-material breaches may be resolvable through a variety of mechanisms and where necessary the Fund will support employers to ensure they are fully aware of their responsibilities and have appropriate arrangements in place to comply with them. This may be achieved through training, the issue of guidance notes and or process review to ensure that best practice is implemented. All such arrangements will be implemented according to an agreed plan and timescale. The agreed support will be recorded against the breach and will be formally notified to the employer.

If the employer then fails to improve a formal notification will be issued with a fine for persistent breach and if that fails then consideration will be given to formally reporting the failing to the Pensions Regulator

7. Material Breaches by Employers

Where it is considered that there is a material breach by an employer then the

Pensions Manager will produce a report for the Head of Pensions, who will consider the breach in line with the Code of Practice, investigate as necessary and obtain legal advice where required in determining the necessity to report. The Chairs of the Pensions Committee and the Pensions Board will be provided with a copy of the report and notified of the action taken by the **Head of Pensions** within 10 days of receipt of the report.

Serious breaches identified such as fraud and misappropriation will be notified to the Regulator as soon as practicable and appropriate auditors/police authority for investigation. Arrangements will be made with the Regulator to support the determination of any action once the investigations have concluded.

8. Non Material Breaches by the Admin Authority

Such breaches will be recorded by the **Pensions Manager** and improvement actions agreed with the **Head of Pensions** for inclusion in ongoing Improvement plans, Services plans or Administration Strategy as appropriate.

9. Material Breaches by the Admin Authority

These breaches or suspected breaches will be reported to the **S151 officer and/or the Police** for formal investigation. The investigation will be carried out by internal audit section and/or the police as required and the Pensions Regulator notified as soon as practicable and in accordance with TPR guidance.

10. Reporting of Breaches

In addition to the requirement to report Material breaches to the Pensions Regulator, the Pensions Manager will formally report all breaches to the Avon Pension Fund Committee and the Pension Board on a quarterly basis, notifying the chairs of both of any significant issues as appropriate.

If at any time the Committee or the Board disagree with the actions taken by the Head of Pensions, then escalation will be to the S151 officer and or the Strategic Director for Resources.

Full details of the Legal responsibilities and duties in respect of Breaches of the Law can be found in Code of Practice 14

<http://www.thepensionsregulator.gov.uk/codes/code-governance-administrationpublic-service-pension-schemes>

[illegible]

Appendix 2

APF BREACHES

[illegible]

Appendix 3

MATERIAL BREACHES

[illegible]

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Bath & North East Somerset Council		
MEETING:	LOCAL PENSION BOARD - AVON PENSION FUND	
MEETING DATE:	30 November 2021	AGENDA ITEM NUMBER
TITLE:	Statutory Reporting and Year End	
WARD:	ALL	
AN OPEN PUBLIC ITEM		
List of Attachments to this report:		
Appendix 1 – TPR Annual Scheme Return		

1. THE ISSUE

- 1.1. The purpose of this report is to inform the Pension Board of the actions undertaken by the Fund Administration in completion of the 2020/2021 employer year end data exercise and statutory annual benefit statement exercise.
- 1.2. The law requires schemes to disclose information about benefits and scheme administration to scheme members
- 1.3. The Fund has a legal statutory requirement to provide members with a benefit statement annually by 31st August.
- 1.4. Where applicable the Fund has a legal statutory requirement to issue a Pension Saving Statement (PSS) if a members' pensions savings exceed the standard annual tax year allowance.

2. RECOMMENDATION

- 2.1. That the Board notes the report.

3. FINANCIAL IMPLICATIONS

- 3.1. There are no direct implications related to the Pension Board in connection with this report.

4. REPORT

- 4.1. The introduction of the Pensions Act 2013 extended the powers of the Pensions Regulator (TPR) to public sector schemes from 1 April 2014. The Pension Regulator introduced the Code of Practice 14 for the administration of public sector schemes in 2015. This, amongst other things, addressed the issue of annual benefit statements to members.

5. YEAR END EXERCISE

- 5.1. In preparation the Fund must undertake an annual exercise to reconcile member data supplied by employers at each 31st March year end. There are 459 active employers of which 273 provide member data digitally to the Fund on a monthly basis covering 76% of active scheme membership. The remaining employers continue to provide data annually.
- 5.2. For the purpose of data accuracy, the digital monthly employer returns undergo a reconciliation process on a continuous basis. Where the employer annually submits a data return it invariably will require further scrutiny and employer engagement to reconcile. The Fund is aiming to digitalise all employer returns as part of its published Administration Strategy.
- 5.3. To enable the Fund to scrutinise and reconcile member data all employers are requested to submit year end returns annually by 30th April with any subsequent follow up queries and amendments notified to the Fund by 30th June. Where there is a failure to provide timely or accurate information the Fund will review each affected employer in accordance with the criteria set out in the Administration Strategy with a view to potential penalty charges being applied.
- 5.4. With regard to potential employer penalty charges for 2021 the Fund identified the following:-
- 4 Late returns (including BCC)
 - 3 employers with data queries in excess of 10% of active membership
 - 3 for disproportionate work (Strictly Education)
 - 9 for Data Improvement Plan (DIP) notices to be issued
- No employers were identified as causing a materially significant breach to the TPR by the delay in providing information.
- 5.5. Administration Officers are in the process of a final review prior to issuing penalty notices. All fined employers will also receive a DIP in addition to any penalty charge with the option of receiving training in lieu of the charge if it is a first time occurrence.

6. MEMBER COMMUNICATIONS

6.1. Annual Benefit Statements – active members

- 6.2. Officers completed work to reconcile data returns ahead of the statutory ABS exercise. Summarily, 97.65% of active member statements were issued ahead of the 31st August deadline. The table below details the statements sent

Statement type and collation	Total Statements	Total mailing
Single Statements	28,456	28,456
Double Statements	4,442	2,221
Triple Statements*	975	325
Four Statements*	224	56
Five Statements*	40	8
Six Statements*	6	1
PSOD Single Statements*	24	24
Overseas Statements	6	5
Totals	34,173	31,096

6.3. A further 3,314 perspective statements were extracted due to the following:

Missing Address
Casual Missing Hours/Earnings
In-Progress Leaver

6.4. Work is ongoing to obtain missing member CARE data and to trace any missing addresses

6.5. Subsequently, a further 792 active member statements were issued as part of a supplementary ABS exercise on 25th October 2021.

7. PENSIONS SAVINGS STATEMENTS

7.1. The Fund is required to issue a Pensions Saving Statement (PSS) if pensions savings in the APF exceed the standard annual allowance. The annual allowance is the maximum amount of pension saving that an individual can make each tax year that benefits from tax relief. The standard annual allowance is £40,000 for the 2020/2021 tax year. The statement includes information that members must consider in determining whether a tax charge is liable.

7.2. Detailed analysis and work undertaken by Quality Assurance team to complete the annual process to assess member savings has been completed. The Fund issued 86 statements for LGPS members and a further 8 statements for members of the Firefighter's Pension Scheme. All statements were issued ahead of the statutory deadline of 6th October.

8 TPR - ANNUAL SCHEME RETURN

8.1 Public service schemes have a legal obligation to supply the Pensions Regulator annually with certain information via a scheme return.

8.2 The information required includes scheme details, employer details and governance details. All information is completed and submitted to TPR via the online service exchange.

8.3 A copy of the submission for the Fund as at 31st March 2021 is attached at Appendix 1.

9 RISK MANAGEMENT

9.1 The Avon Pension Fund Committee is the formal decision-making body for the Fund. As such it has responsibility to ensure adequate risk management processes are in place. It discharges this responsibility by ensuring the Fund has an appropriate investment strategy and investment management structure in place that is regularly monitored. In addition, it monitors the benefits administration, the risk register and compliance with relevant investment, finance and administration regulations.

10 EQUALITIES

10.1 A proportionate equalities impact assessment has been carried out using corporate guidelines and no significant issues have been identified.

11 CLIMATE CHANGE

11.1 The Fund is implementing a digital strategy across all its operations and communications with stakeholders to reduce its internal carbon footprint in line with the Council's Climate Strategy. The Fund acknowledges the financial risk to its assets from climate change and is addressing this through its strategic asset allocation to Paris Aligned Equities, Sustainable Equities and renewable energy opportunities. The strategy is monitored and reviewed by the Committee.

12 CONSULTATION

1.1 Reports and its contents have been discussed with the Head of Business Finance & Pensions representing the Avon Pension Fund and Service Director – One West representing the administering authority.

Contact person	Geoff Cleak – Pensions Manager – 01225 395277
Background papers	Various statistical reports
Please contact the report author if you need to access this report in an alternative format	

The Pensions Regulator

Your scheme details:

LGPS - Avon Pension Fund

Date produced: **07 October 2021**

PSR number: 10079156

Please note that this document cannot be used in place of a scheme return and will not be accepted as such by the Pensions Regulator. If you are required to complete a scheme return and are unable to do so online you should contact us by phone on 0345 600 5666 and select option 2 (Mon - Fri 9am - 5.30pm). Alternatively you can email us at exchange@thepensionsregulator.gov.uk

1. Introduction

The following are the details held by the Pensions Regulator. The manager of the scheme has a duty under law to ensure registrable details are kept up to date. Should you require to correct these details you can do so by going to the Pensions Regulator's website at <https://exchange.thepensionsregulator.gov.uk>. Then log in, select this scheme and make the required changes.

Please note that this document cannot be used in place of a scheme return and will not be accepted as such by the Pensions Regulator. If you are required to complete a scheme return and are unable to do so online you should contact us by phone on 0345 600 5666 and select option 2 (Mon - Fri 9am - 5.30pm). Alternatively you can email us at exchange@thepensionsregulator.gov.uk

2. Scheme details (includes membership details)

Basic details	
Scheme name	LGPS - Avon Pension Fund
PSR number	10079156
Scheme address	Bath & North East Somerset Council Lewis House Manvers Street BATH BA1 1JG United Kingdom
Scheme type	Occupational
Benefit type	Defined benefit
Current status	Open to new members since 01 April 1991
Scheme year-end (DD/MM)	31/03 since 01 April 1937
HMRC reference number (PSTR)	00329295RJ

Number of members as at 31 March 2020 The Pensions Regulator requires to know the number of members present at the scheme year-end between the dates 1 April 2019 and 31 March 2020.	
Active members	38064
Deferred members	42503
Pensioner members	33602
Total of members	114169

Number of members as at 31 March 2021 The Pensions Regulator requires to know the number of members present at the scheme year-end between the dates 1 April 2020 and 31 March 2021.	
Active members	39931
Deferred members	42748
Pensioner members	34967
Total of members	117646

3. Governance Details

PSR number: 10079156

Please note that this document cannot be used in place of a scheme return and will not be accepted as such by the Pensions Regulator. If you are required to complete a scheme return and are unable to do so online you should contact us by phone on 0345 600 5666 and select option 2 (Mon - Fri 9am - 5.30pm). Alternatively you can email us at exchange@thepensionsregulator.gov.uk

Manager of the scheme	
Role or organisation name	BATH AND NORTH EAST SOMERSET COUNCIL
Address of manager of the scheme	Bath & North East Somerset Council Lewis House Manvers Street BATH BA1 1JG United Kingdom
Telephone number	01225 395100
Email address	geoff_cleak@bathnes.gov.uk

Pension board member	
Name of pension board member	Mr Mark King
Pension board member type	Member
Chair of pension board	No
Address of pension board member	Bath & North East Somerset Council Lewis House Manvers Street BATH BA1 1JG United Kingdom
Telephone number	01225 395100
Email address	mark.king@southglos.gov.uk

Pension board member	
Name of pension board member	Mr David Yorath
Pension board member type	Member
Chair of pension board	No
Address of pension board member	Bath & North East Somerset Council Lewis House Manvers Street BATH BA1 1JG United Kingdom
Telephone number	01225 395100
Email address	dlyorath@aol.com

PSR number: 10079156

Pension board member	
Name of pension board member	Mr Tony Whitlock
Pension board member type	Employer
Chair of pension board	No
Address of pension board member	Bath & North East Somerset Council Lewis House Manvers Street BATH BA1 1JG United Kingdom
Telephone number	01225 395100
Email address	tony.whitlock@bristol.gov.uk

Pension board member	
Name of pension board member	Mr Steve Harman
Pension board member type	Employer
Chair of pension board	No
Address of pension board member	Bath & North East Somerset Council Lewis House Manvers Street BATH BA1 1JG United Kingdom
Telephone number	01225 395100
Email address	steve_harman@bathnes.gov.uk

Pension board member	
Name of pension board member	Mr Nick Weaver
Pension board member type	Independent
Chair of pension board	Yes
Address of pension board member	Bath & North East Somerset Council Lewis House Manvers Street BATH BA1 1JG United Kingdom
Telephone number	01225 395100
Email address	wjlnservices@gmail.com

PSR number: 10079156

Pension board member	
Name of pension board member	Mr Peter Sloman
Pension board member type	Employer
Chair of pension board	No
Address of pension board member	Bath & North East Somerset Council Lewis House Manvers Street BATH BA1 1JG United Kingdom
Telephone number	01225 395100
Email address	peter.sloman@weston.ac.uk

Pension board member	
Name of pension board member	Ms Helen Ball
Pension board member type	Member
Chair of pension board	No
Address of pension board member	Bath & North East Somerset Council Lewis House Manvers Street BATH BA1 1JG United Kingdom
Telephone number	01225 395100
Email address	helenthornbury@aol.com

PSR number: 10079156

PSR number: 10079156

3. Record-keeping

Common data	
Have you measured your common data in the last three years?	Yes
When did you last measure your common data?	September 2021
What percentage of this data have you assessed to be present and accurate?	95%

Scheme-specific ('conditional') data	
Have you measured your scheme-specific ('conditional') data in the last three years?	Yes
When did you last measure your scheme-specific ('conditional') data?	September 2021
What percentage of this data have you assessed to be present and accurate?	95%

5. Employer details

Employer	
Employer's name	Abbeywood Community School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bradley Stoke Community School Fiddlers Wood Lane Bradley Stoke Bristol BS32 9BS United Kingdom
Employer status	Active since 01 January 2013
Employer email address	
Companies House number	07844791

Employer	
Employer's name	Abbot Alphege Academy (Free School)
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Abbot Alphege Academy Beckford Drive Lansdown BATH BA1 9AU United Kingdom
Employer status	Active since 01 September 2017
Employer email address	
Companies House number	10049139

Employer	
Employer's name	ABM Catering Limited (SGC)
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	A B M Catering Ltd Eagle Court 63-73 Saltisford WARWICK CV34 4AF United Kingdom
Employer status	Active since 01 August 2019
Employer email address	
Companies House number	04168334

PSR number: 10079156

Employer	
Employer's name	Academy of Trinity C of E
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Trinity C of E Primary School Woodborough Lane RADSTOCK BA3 3DE United Kingdom
Employer status	Active since 01 January 2011
Employer email address	
Companies House number	07365778

Employer	
Employer's name	Active Community Engagement Ltd
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	3 Dee Court High Street Farndon Cheshire CH3 6PU United Kingdom
Employer status	Active since 30 January 2009
Employer email address	
Companies House number	06526046

Employer	
Employer's name	Adapt Business Services Ltd NSC
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Canolfan Gorseinon Millers Drive Gorseinon Swansea SA4 4QN United Kingdom
Employer status	Active since 01 October 2019
Employer email address	
Companies House number	06805468

PSR number: 10079156

Employer	
Employer's name	Adoption West Limited
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Wiltshire Council County Hall Bythesea Road TROWBRIDGE Wiltshire BA14 8JN United Kingdom
Employer status	Active since 01 March 2019
Employer email address	
Companies House number	11139404

Employer	
Employer's name	Aequus Developments Limited
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Aequus Group 20 Old Bond Street BATH BA1 1BP United Kingdom
Employer status	Active since 01 June 2018
Employer email address	
Companies House number	10060817

Employer	
Employer's name	Agilisys Limited
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Floor 1 Hafley Court Buckley Road Rochdale OL12 9DN United Kingdom
Employer status	Active since 01 October 2010
Employer email address	
Companies House number	04327369
Employer membership	
Number of defined benefit members	0
Effective date	22 November 2001

PSR number: 10079156

Employer	
Employer's name	Agilysis Limited 2015 (NSC)
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Floor 1 Hafley Court Buckley Road Rochdale Lancashire OL12 9DN United Kingdom
Employer status	Active since 01 February 2015
Employer email address	
Companies House number	04327369

Employer	
Employer's name	All Saints Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	All Saints Lane CLEVEDON Avon BS21 6AU United Kingdom
Employer status	Active since 01 April 2019
Employer email address	
Companies House number	07872799

Employer	
Employer's name	Alliance Homes
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Alliance Homes 40 Martingale Way Portishead BRISTOL BS20 7AW United Kingdom
Employer status	Active since 31 December 2014
Employer email address	
Companies House number	07632446

PSR number: 10079156

Employer	
Employer's name	Alliance in Partnership – Beacon Rise
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	8 - 9 Borough Court Grammar School Lane HALESOWEN West Midlands B63 3SW United Kingdom
Employer status	Active since 01 June 2020
Employer email address	
Companies House number	03577003

Employer	
Employer's name	Alliance in Partnership Limited - Westbury on Trym C of E Academy
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	7-8 Borough Court Grammar School Lane HALESOWEN West Midlands B63 3SW United Kingdom
Employer status	Active since 27 October 2017
Employer email address	
Companies House number	03577003

Employer	
Employer's name	Alliance Living Care (Ebdon Court)
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Alliance Living Care 40 Martingale Way Portishead BRISTOL BS20 7AW United Kingdom
Employer status	Active since 01 April 2020
Employer email address	
Companies House number	04164129

PSR number: 10079156

Employer	
Employer's name	Alliance Living Care Limited
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	41 Martingale Way Portishead North Somerset Bristol BS20 7AW United Kingdom
Employer status	Active since 09 January 2017
Employer email address	
Companies House number	04164129

Employer	
Employer's name	Almondsbury Parish Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	The Scout Hall 249 Gloucester Road Almondsbury BRISTOL BS32 4AD United Kingdom
Employer status	Active since 19 January 2012
Employer email address	

Employer	
Employer's name	Aramark Ltd (South Glos and Stroud College)
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Aramark Ltd Caledonia House, Lawnswood Business Park Redvers Close LEEDS LS16 6QY United Kingdom
Employer status	Active since 01 January 2020
Employer email address	
Companies House number	00983951

PSR number: 10079156

Employer	
Employer's name	Ashcombe Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Ashcombe Cp School Earlham Grove WESTON-SUPER-MARE Avon BS23 3JW United Kingdom
Employer status	Active since 01 September 2017
Employer email address	
Companies House number	10885386

Employer	
Employer's name	Ashley House Hostel
Employer type	Participating Employer
Organisation type	Other
Address of employer	Ashley House Probation & Bail Hostel 14 Somerset Street Kingsdown BRISTOL BS2 8NB United Kingdom
Employer status	Active since 15 April 1976
Employer email address	

Employer	
Employer's name	Ashton Park School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Blackmoors Lane Bower Ashton Bristol BS3 2JL United Kingdom
Employer status	Active since 01 July 2018
Employer email address	
Companies House number	08203318

PSR number: 10079156

Employer	
Employer's name	Ashton Vale Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Ashton Park School Blackmoors Lane BRISTOL BS3 2JL United Kingdom
Employer status	Active since 01 July 2018
Employer email address	
Companies House number	08203318

Employer	
Employer's name	Aspen Cabot Learning Fed
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Ground Floor Teme House Whittington Road Whittington Worcester WR5 2ZX United Kingdom
Employer status	Active since 01 September 2021
Employer email address	
Companies House number	06561073
Employer Pension Scheme Reference (EPSR)	7007

Employer	
Employer's name	Aspens Academies Enterprise Trust(Broadlands)
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Groud Floor Teme House Whittington Road Whittington Worcester WR5 2ZX United Kingdom
Employer status	Active since 15 February 2021
Employer email address	
Companies House number	06561073
Employer Pension Scheme Reference (EPSR)	7011

PSR number: 10079156

Employer	
Employer's name	Aspens Bristol C C PFI
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Suite 5 Offerton Barnes Business Centre Offerton Lane Hindlip Worcester WR3 8XS United Kingdom
Employer status	Active since 22 December 2018
Employer email address	
Companies House number	08397975

Employer	
Employer's name	Aspens EACT
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Ground Floor Teme House Whittington Road Whittington Worcester WR5 2ZX United Kingdom
Employer status	Active since 01 October 2021
Employer email address	
Companies House number	06561073
Employer Pension Scheme Reference (EPSR)	786

Employer	
Employer's name	Aspens ELAN
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Ground Floor Teme House Whittington Road Whittington Worcester WR5 2ZX United Kingdom
Employer status	Active since 01 June 2021
Employer email address	
Companies House number	06561073
Employer Pension Scheme Reference (EPSR)	7001

PSR number: 10079156

Employer	
Employer's name	Aspens Services Limited - Lighthouse Schools Partnership
Employer type	Participating Employer
Organisation type	Other
Address of employer	Suite 5 Offerton Barnes Business Centre Offerton Lane Hindlip Worcester WR3 8XG United Kingdom
Employer status	Active since 01 April 2019
Employer email address	
Companies House number	06561073

Employer	
Employer's name	Aspens Services Limited - Bannerman Road Community Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Suite 5 Offerton Barnes Business Centre Offerton Lane Worcester WR3 8SX United Kingdom
Employer status	Active since 01 August 2016
Employer email address	
Companies House number	08397975

Employer	
Employer's name	Aspens Services Limited - Begbrook
Employer type	Participating Employer
Organisation type	Other
Address of employer	Begbrook Primary Academy Stapleton Bristol BS16 1HG United Kingdom
Employer status	Active since 01 December 2015
Employer email address	
Companies House number	08397975

PSR number: 10079156

Employer	
Employer's name	Aspens Services Limited - Bishop Sutton & Stanton Drew Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Suite 5 Offerton Barnes Business Centre Offerton Lane Hindlip Worcester WR3 8XS United Kingdom
Employer status	Active since 03 April 2018
Employer email address	
Companies House number	06561073

Employer	
Employer's name	Aspens Services Limited - Blackhorse Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Suite 5 Offerton Barnes Business Centre Offerton Lane Worcester WR3 8SX United Kingdom
Employer status	Active since 28 February 2017
Employer email address	
Companies House number	08397975

Employer	
Employer's name	Aspens Services Limited - Castle Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Suite 5 Offerton Barnes Business Centre Offerton Lane Worcester Hindlip WR3 8SX United Kingdom
Employer status	Active since 01 September 2018
Employer email address	
Companies House number	08397975

PSR number: 10079156

Employer	
Employer's name	Aspens Services Limited - Cathedral Schools Trust
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Suite 5 Offerton Barnes Business Centre Offerton Lane Hindlip Worcester WR3 8WS United Kingdom
Employer status	Active since 01 June 2019
Employer email address	
Companies House number	06561073

Employer	
Employer's name	Aspens Services Limited - Charfield Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Suite 5 Offerton Barnes Business Centre Offerton Lane Worcester Hindlip WR3 8SX United Kingdom
Employer status	Active since 01 September 2016
Employer email address	
Companies House number	08397975

Employer	
Employer's name	Aspens Services Limited - Cherry gardens Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Suite 5 Offerton Barnes Business Centre Offerton Lane Hindlip Worcester WR3 8SX United Kingdom
Employer status	Active since 01 April 2017
Employer email address	
Companies House number	08397975

PSR number: 10079156

Employer	
Employer's name	Aspens Services Limited - Culverhill School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Suite 5 Offerton Barns Business Centre Offerton Lane Hindlip Worcester WR3 8SX United Kingdom
Employer status	Active since 01 May 2017
Employer email address	
Companies House number	08397975

Employer	
Employer's name	Aspens Services Limited - Downend School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Suite 5 Offerton Barns Business Centre Offerton Lane Worcester Hindlip WR3 8SX United Kingdom
Employer status	Active since 01 September 2016
Employer email address	
Companies House number	08397975

Employer	
Employer's name	Aspens Services Limited - Frome Vale Academy
Employer type	Participating Employer
Organisation type	Other
Address of employer	Frome Valley Academy Frenchay Road Downend Bristol BS16 2QS United Kingdom
Employer status	Active since 01 December 2015
Employer email address	
Companies House number	08397975

PSR number: 10079156

Employer	
Employer's name	Aspens Services Limited - Hanham Abbots Junior
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Suite 5 Offerton Barnes Business Centre Offerton Lane Hindlip Worcester WR3 8XS United Kingdom
Employer status	Active since 01 April 2017
Employer email address	
Companies House number	08397975

Employer	
Employer's name	Aspens Services Limited - Hanham Woods Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Aspens Services Ltd Unit 5, Offerton Barnes Business Centre Offerton Lane, Hindlip WORCESTER WR3 8SX United Kingdom
Employer status	Active since 11 November 2015
Employer email address	
Companies House number	08397975

Employer	
Employer's name	Aspens Services Limited - Kings Oak
Employer type	Participating Employer
Organisation type	Other
Address of employer	Aspens Services Ltd Unit 5, Offerton Barnes Business Centre Offerton Lane, Hindlip WORCESTER WR3 8SX United Kingdom
Employer status	Active since 11 November 2015
Employer email address	
Companies House number	08397975

PSR number: 10079156

Employer	
Employer's name	Aspens Services Limited - Longwell Green Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Suite 5 Offerton Barns Business Centre Offerton Lane Worcester Hindlip WR3 8SX United Kingdom
Employer status	Active since 01 April 2017
Employer email address	
Companies House number	08397975

Employer	
Employer's name	Aspens Services Limited - Mangotsfield School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Suite 5 Offerton Barns Business Centre Offerton Lane Worcester Hindlip WR3 8SX United Kingdom
Employer status	Active since 01 September 2016
Employer email address	
Companies House number	08397975

Employer	
Employer's name	Aspens Services Limited - Marlwood School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Marlwood School Vattingstone Lane Alveston BRISTOL BS35 3LA United Kingdom
Employer status	Active since 01 September 2016
Employer email address	
Companies House number	08397975

PSR number: 10079156

Employer	
Employer's name	Aspens Services Limited - Minerva Academy
Employer type	Participating Employer
Organisation type	Other
Address of employer	Aspens Services Ltd Unit 5, Offerton Barns Business Centre Offerton Lane, Hindlip WORCESTER WR3 8SX United Kingdom
Employer status	Active since 01 December 2015
Employer email address	
Companies House number	08397975

Employer	
Employer's name	Aspens Services Limited - New Horizons Learning Centre
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Suite 5 Offerton Barns Business Centre Offerton Lane Hindlip Worcester WR3 8SX United Kingdom
Employer status	Active since 08 April 2017
Employer email address	
Companies House number	08397975

Employer	
Employer's name	Aspens Services Limited - Staple Hill Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Suite 5 Offerton Barns Business Centre Offerton Lane Hindlip Worcester WR3 8SX United Kingdom
Employer status	Active since 01 June 2017
Employer email address	
Companies House number	08397975

PSR number: 10079156

Employer	
Employer's name	Aspens Services Limited - Summerhill
Employer type	Participating Employer
Organisation type	Other
Address of employer	Summerhill Academy Plummers Hill St George Bristol BS5 7JU United Kingdom
Employer status	Active since 01 December 2015
Employer email address	
Companies House number	08397975

Employer	
Employer's name	Aspens Services Limited - The Castle School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Suite 5 Offerton Barnes Business Centre Offerton Lane Hindlip Worcester WR3 8XS United Kingdom
Employer status	Active since 01 September 2016
Employer email address	
Companies House number	08397975

Employer	
Employer's name	Aspens Services Limited - Tynings
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Suite 5 Offerton Barnes Business Centre Offerton Lane Hindlip Worcester WR3 8XS United Kingdom
Employer status	Active since 01 April 2017
Employer email address	
Companies House number	08397975

PSR number: 10079156

Employer	
Employer's name	Aspens Services Limited - Warmley Park Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Suite 5 Offerton Barns Business Centre Offerton Lane Worcester Hindlip WR3 8SX United Kingdom
Employer status	Active since 01 October 2016
Employer email address	
Companies House number	08397975

Employer	
Employer's name	Aspire Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Wellsway School Academy Trust Chandag Road Keynsham Bristol BS31 1PH United Kingdom
Employer status	Active since 01 April 2014
Employer email address	
Companies House number	07746787

Employer	
Employer's name	Ategi limited
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	ategi Ltd Flynn House, Cardiff Road Rhydyfelin PONTYPRIDD Mid Glamorgan CF37 5HP United Kingdom
Employer status	Active since 01 January 2017
Employer email address	
Companies House number	04831569

PSR number: 10079156

Employer	
Employer's name	Avon Fire & Rescue Service
Employer type	Participating Employer
Organisation type	Other
Address of employer	Fire Brigade Headquarter Temple Back Bristol BS1 6ED United Kingdom
Employer status	Active since 01 April 1996
Employer email address	
Employer membership	
Number of defined benefit members	0
Effective date	01 April 1996

Employer	
Employer's name	Backwell C of E Junior School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Backwell C of E VC Junior School Church Lane Backwell BRISTOL BS48 3JJ United Kingdom
Employer status	Active since 01 February 2018
Employer email address	
Companies House number	07662102

Employer	
Employer's name	Backwell Parish Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	1st Floor 43 Rodney Road Backwell Bristol BS48 3HW United Kingdom
Employer status	Active since 18 December 1997
Employer email address	

PSR number: 10079156

Employer	
Employer's name	Backwell School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Backwell School Station Road Backwell BRISTOL BS48 3BX United Kingdom
Employer status	Active since 01 April 2011
Employer email address	
Companies House number	07545681
Employer membership	
Number of defined benefit members	0
Effective date	28 February 2011

Employer	
Employer's name	Badock's Wood E-ACT Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Badocks Wood Primary School Doncaster Road BRISTOL BS10 5PU United Kingdom
Employer status	Active since 01 September 2018
Employer email address	
Companies House number	06526376

Employer	
Employer's name	BAM Construct UK Ltd
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Merit House Edgware Road Colindale London NW9 5AF United Kingdom
Employer status	Active since 06 October 2008
Employer email address	
Companies House number	03311781

PSR number: 10079156

Employer	
Employer's name	Bannerman Road Community Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bannerman Road Community Academy & Childrens Centre Colston Girls School Trust Cheltenham Road Bristol BS6 5RD United Kingdom
Employer status	Active since 01 January 2013
Employer email address	
Companies House number	06511936

Employer	
Employer's name	Barton Hill Academy (Growth in Learning Trust)
Employer type	Participating Employer
Organisation type	Other
Address of employer	Barton Hill Academy Colston Girls School Trust Cheltenham Road Bristol BS6 5RD United Kingdom
Employer status	Active since 01 September 2014
Employer email address	
Companies House number	06511936

Employer	
Employer's name	Bath & North East Somerset County Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Human Resources Dept Lewis House Manvers Street Bath BA1 1JG United Kingdom
Employer status	Active since 01 April 1996
Employer email address	

PSR number: 10079156

Employer	
Employer's name	Bath and Wells MAT Catering Retender
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Edwards & Ward Ltd The Old Stables Whitehill Road CROWBOROUGH East Sussex TN6 1JP United Kingdom
Employer status	Active since 01 September 2018
Employer email address	
Companies House number	08207095

Employer	
Employer's name	Bath Spa University
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Finance Department Newton Park Newton St Loe Bath BA2 9BN United Kingdom
Employer status	Active since 01 April 1996
Employer email address	
Companies House number	02496869

Employer	
Employer's name	Bathampton Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bath & Wells Diocesan Board of Finance The Old Deanery WELLS Somerset BA5 2UG United Kingdom
Employer status	Active since 01 March 2018
Employer email address	
Companies House number	08207095

PSR number: 10079156

Employer	
Employer's name	Batheaston CE Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bath & Wells Diocesan Board of Finance The Old Deanery WELLS Somerset BA5 2UG United Kingdom
Employer status	Active since 01 March 2018
Employer email address	
Companies House number	08207095

Employer	
Employer's name	Bathford CE Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bathford C of E V C Primary School Dovers Park Bathford BATH BA1 7UB United Kingdom
Employer status	Active since 01 April 2018
Employer email address	
Companies House number	08207095

Employer	
Employer's name	Bathwick St Marys CE Primary
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bath & Wells Diocesan Board of Finance The Old Deanery WELLS Somerset BA5 2UG United Kingdom
Employer status	Active since 01 March 2018
Employer email address	
Companies House number	08207095

PSR number: 10079156

Employer	
Employer's name	Becket Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Becket Primary School Tavistock Road WESTON-SUPER-MARE Avon BS22 6DH United Kingdom
Employer status	Active since 01 September 2017
Employer email address	
Companies House number	10885386

Employer	
Employer's name	Bedminster Down School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bedminster Down School Donald Road BRISTOL BS13 7DQ United Kingdom
Employer status	Active since 01 October 2011
Employer email address	
Companies House number	07829616

Employer	
Employer's name	Beechen Cliff Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Alexandra Park Bath BA2 4RE United Kingdom
Employer status	Active since 01 April 2011
Employer email address	
Companies House number	07551986

PSR number: 10079156

Employer	
Employer's name	Begbrook Primary Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Federation House King's Oak Academy Brook Road Kingswood Bristol BS15 4JT United Kingdom
Employer status	Active since 01 September 2012
Employer email address	
Companies House number	06561073

Employer	
Employer's name	Bespoke Cleaning CSET
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Bespoke House Unit 3, Crossways Business Park Crossways Lane Bristol BS35 3UE United Kingdom
Employer status	Active since 01 June 2018
Employer email address	
Companies House number	04394883

Employer	
Employer's name	Bespoke Cleaning Olympus (OAT)
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Bespoke House Unit 3, Crossways Business Park Crossways Lane Bristol BS35 3UE United Kingdom
Employer status	Active since 01 September 2018
Employer email address	
Companies House number	04394883

PSR number: 10079156

Employer	
Employer's name	Bespoke Cleaning Services Ltd – South Gloucestershire & Stroud College
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Bespoke Cleaning Services Ltd Unit 2-3, Crossways Business Park Crossways Lane, Thornbury BRISTOL BS35 3UE United Kingdom
Employer status	Active since 01 September 2019
Employer email address	
Companies House number	04394883

Employer	
Employer's name	Birdwell Primary School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Birdwell Primary School Hollis Close Long Ashton BRISTOL BS41 9AZ United Kingdom
Employer status	Active since 01 April 2013
Employer email address	
Companies House number	08425918

Employer	
Employer's name	Bishop Sutton Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bishops Sutton Cp School Wick Road Bishop Sutton BRISTOL BS39 5XD United Kingdom
Employer status	Active since 01 January 2019
Employer email address	
Companies House number	07662102

PSR number: 10079156

Employer	
Employer's name	Blagdon Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Blagdon Primary School Bath Road Blagdon BRISTOL BS40 7RW United Kingdom
Employer status	Active since 01 October 2019
Employer email address	
Companies House number	07662102

Employer	
Employer's name	Bournville Primary Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bournville Primary School Selworthy Road WESTON-SUPER-MARE Avon BS23 3ST United Kingdom
Employer status	Active since 01 October 2017
Employer email address	
Companies House number	10896504

Employer	
Employer's name	Bradley Stoke Community School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bradley Stoke Community School Fiddlers Wood Lane Bradley Stoke Bristol BS32 9BS United Kingdom
Employer status	Active since 01 January 2012
Employer email address	
Companies House number	07844791

PSR number: 10079156

Employer	
Employer's name	Bradley Stoke Town Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Council Office The Jubilee Centre Savages Wood Road Bradley Stoke Bristol BS32 8HL United Kingdom
Employer status	Active since 05 January 2000
Employer email address	

Employer	
Employer's name	Bridge Learning Campus Foundation
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bridge Learning Campus Trust House Teyfant Road Hartcliffe Bristol BS13 0RG United Kingdom
Employer status	Active since 01 March 2013
Employer email address	
Companies House number	08089704

Employer	
Employer's name	Bristol Free School Trust
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bristol Free School Trust Concorde Drive Bristol BS10 6NS United Kingdom
Employer status	Active since 01 September 2011
Employer email address	
Companies House number	07474359

PSR number: 10079156

Employer	
Employer's name	Bristol Futures Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Knightstone Road Weston Super Mare North Somerset BS23 2AL United Kingdom
Employer status	Active since 01 September 2014
Employer email address	
Companies House number	08329993

Employer	
Employer's name	Bristol Waste Company
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Bristol Waste Company Unit 2, Markeside Trading Estate Albert Road St Philips Bristol BS2 0XS United Kingdom
Employer status	Active since 07 October 2015
Employer email address	
Companies House number	09472624

Employer	
Employer's name	Broadlands Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Broadlands Academy St. Francis Road Keynsham BRISTOL BS31 2DY United Kingdom
Employer status	Active since 01 December 2012
Employer email address	
Companies House number	06625091

PSR number: 10079156

Employer	
Employer's name	Broad oak Academy [Maths and Computing College]
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Broad oak Mathematics & Computing College Windwhistle Road WESTON-SUPER-MARE Avon BS23 4NP United Kingdom
Employer status	Active since 01 February 2012
Employer email address	
Companies House number	07872725

Employer	
Employer's name	BTE Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	New Road Stoke Gifford Bristol BS34 8SF United Kingdom
Employer status	Active since 01 September 2013
Employer email address	
Companies House number	07638089

Employer	
Employer's name	Cabot Learning Federation
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Federation House King's Oak Academy Brook Hill Kingswood Bristol BS15 4JT United Kingdom
Employer status	Active since 01 September 2009
Employer email address	
Companies House number	06207590

PSR number: 10079156

Employer	
Employer's name	Callicroft Primary Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bradley Stoke Community School Fiddlers Wood Lane Bradley Stoke Bristol BS32 9BS United Kingdom
Employer status	Active since 01 October 2015
Employer email address	
Companies House number	08662756

Employer	
Employer's name	Cameley C of E Primary
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Cameley C of E VC Primary School Meadway Temple Cloud BRISTOL BS39 5BD United Kingdom
Employer status	Active since 01 June 2019
Employer email address	
Companies House number	07728112

Employer	
Employer's name	Castle Batch Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Priory School Queensway WESTON-SUPER-MARE Avon BS22 6BP United Kingdom
Employer status	Active since 01 April 2018
Employer email address	
Companies House number	07698707

PSR number: 10079156

Employer	
Employer's name	Castle Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Castle Primary School Newlands Road Keynsham BRISTOL BS31 2TS United Kingdom
Employer status	Active since 01 July 2019
Employer email address	
Companies House number	07728112

Employer	
Employer's name	Castle School Education Trust
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Castle School Park Road Thornbury BRISTOL BS35 1HT United Kingdom
Employer status	Active since 01 March 2012
Employer email address	
Companies House number	08397975

Employer	
Employer's name	Cathedral Schools Trust
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bristol Cathedral Choir School College Square BRISTOL BS1 5TS United Kingdom
Employer status	Active since 01 September 2008
Employer email address	
Companies House number	06516626

PSR number: 10079156

Employer	
Employer's name	Chandag Infants School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Chandag Infant School Chandag Road Keynsham BRISTOL BS31 1PQ United Kingdom
Employer status	Active since 01 July 2017
Employer email address	
Companies House number	07746787

Employer	
Employer's name	Chandag Junior School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Chandag Junior School Chandag Road Keynsham BRISTOL BS31 1PQ United Kingdom
Employer status	Active since 01 July 2017
Employer email address	
Companies House number	07746787

Employer	
Employer's name	Charborough Road Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bradley Stoke Community School Fiddlers Wood Lane Bradley Stoke Bristol BS32 9BS United Kingdom
Employer status	Active since 01 January 2015
Employer email address	
Companies House number	07844791

PSR number: 10079156

Employer	
Employer's name	Charfield Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	The Castle School Park Road Thornbury South Gloucestershire BS35 1HT United Kingdom
Employer status	Active since 01 September 2013
Employer email address	
Companies House number	08397975

Employer	
Employer's name	Charlton Wood Primary Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Charlton Wood Primary Academy School Charlton Boulevard Patchway BRISTOL BS34 5BN United Kingdom
Employer status	Active since 01 September 2019
Employer email address	
Companies House number	08245853

Employer	
Employer's name	Chartwells - South Glos & Stroud College
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Parklands Court 24 Parklands Birmingham Great Park Birmingham B45 9PZ United Kingdom
Employer status	Active since 01 August 2017
Employer email address	
Companies House number	01790863

PSR number: 10079156

Employer	
Employer's name	Cheddar Grove Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Wellsway School Chandag Road Keynsham Bristol BS31 1PH United Kingdom
Employer status	Active since 01 February 2019
Employer email address	
Companies House number	07746787

Employer	
Employer's name	Chestnut Park Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	C/O Clevedon School Valley Road Clevedon North Somerset BS21 6AH United Kingdom
Employer status	Active since 01 September 2021
Employer email address	
Companies House number	07872799
Employer Pension Scheme Reference (EPSR)	7024

Employer	
Employer's name	Chew Magna Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Chew Magna Primary School Chew Magna BRISTOL BS40 8RQ United Kingdom
Employer status	Active since 01 June 2019
Employer email address	
Companies House number	07728112

PSR number: 10079156

Employer	
Employer's name	Chew Stoke Church School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Chew Stoke Church School School Lane Chew Stoke BRISTOL BS40 8UY United Kingdom
Employer status	Active since 01 September 2012
Employer email address	
Companies House number	08165319

Employer	
Employer's name	Chew Valley School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Chew Valley Comprehensive School Chew Lane Chew Magna BRISTOL BS40 8QB United Kingdom
Employer status	Active since 01 February 2018
Employer email address	
Companies House number	07662102

Employer	
Employer's name	Chipping Sodbury School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bowling road Chipping Sodbury South Glos BS37 6EW United Kingdom
Employer status	Active since 01 April 2021
Employer email address	
Companies House number	07699625
Employer Pension Scheme Reference (EPSR)	7000

PSR number: 10079156

Employer	
Employer's name	Christ Church C of E Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Christchurch C of E Primary School Royal Park BRISTOL BS8 3AW United Kingdom
Employer status	Active since 01 July 2012
Employer email address	
Companies House number	08082405

Employer	
Employer's name	Christ Church Primary School (WSM)
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Christ Church V A Primary School Baker Street WESTON-SUPER-MARE Avon BS23 3AF United Kingdom
Employer status	Active since 01 September 2017
Employer email address	
Companies House number	10885386

Employer	
Employer's name	Churchill - CLF
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Unit 1 40 Coldharbour Lane HARPENDEN Hertfordshire AL5 4UN United Kingdom
Employer status	Active since 01 December 2018
Employer email address	
Companies House number	00002065

PSR number: 10079156

Employer	
Employer's name	Churchill Academy
Employer type	Participating Employer
Organisation type	Other
Address of employer	Churchill Green Churchill North Somerset BS25 5QN United Kingdom
Employer status	Active since 01 August 2011
Employer email address	
Companies House number	07687722
Employer membership	
Number of defined benefit members	0
Effective date	29 June 2011

Employer	
Employer's name	Churchill CofE Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Unit 1 40 Coldharbour Lane HARPENDEN Hertfordshire AL5 4UN United Kingdom
Employer status	Active since 01 September 2019
Employer email address	
Companies House number	00002065

Employer	
Employer's name	Churchill Contract Services - Wellway MAT
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Unit 1 40 Coldharbour Lane HARPENDEN Hertfordshire AL5 4UN United Kingdom
Employer status	Active since 01 September 2019
Employer email address	
Companies House number	03762020

PSR number: 10079156

Employer	
Employer's name	Churchill Contract Services Ltd - Westhaven School
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Unit 1 34 Coldharbour Lane HARPENDEN Hertfordshire AL5 4UN United Kingdom
Employer status	Active since 10 February 2016
Employer email address	
Companies House number	03762020

Employer	
Employer's name	Churchill Golden Valley Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Churchill Clean Unit 1 40 Coldharbour Lane HARPENDEN Hertfordshire AL5 4UN United Kingdom
Employer status	Active since 01 April 2020
Employer email address	
Companies House number	00002065

Employer	
Employer's name	Circadian Trust (No 1)
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Head Office Thornbury Leisure Centre Alveston Hill Thornbury South Gloucestershire BS35 3JB United Kingdom
Employer status	Active since 07 March 2005
Employer email address	
Companies House number	05384234
Charities number	1111467
Employer membership	
Number of defined benefit members	0
Effective date	07 March 2005

PSR number: 10079156

Employer	
Employer's name	City Academy, Bristol
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Federation House King's Oak Academy Brook Road Kingswood Bristol BS15 4JT United Kingdom
Employer status	Active since 01 January 2013
Employer email address	
Companies House number	04537464

Employer	
Employer's name	City Of Bath College
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Avon Street Bath BA1 1UP United Kingdom
Employer status	Active since 01 April 1996
Employer email address	

Employer	
Employer's name	City Of Bristol College
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	South Bristol Skills Academy Hengrove Park The Boulevard Bristol BS14 0DB United Kingdom
Employer status	Active since 01 April 1996
Employer email address	

PSR number: 10079156

Employer	
Employer's name	City of Bristol Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Council House College Green Bristol BS1 5TR United Kingdom
Employer status	Active since 01 April 1996
Employer email address	

Employer	
Employer's name	City of Bristol Council (Air Balloon Primary)
Employer type	Participating Employer
Organisation type	Other
Address of employer	Hillside Road St George Bristol BS5 7PB United Kingdom
Employer status	Active since 01 September 2021
Employer email address	
Employer Pension Scheme Reference (EPSR)	998

Employer	
Employer's name	Clevedon School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Clevedon School Valley Road CLEVEDON Avon BS21 6AH United Kingdom
Employer status	Active since 01 February 2012
Employer email address	
Companies House number	07872799

PSR number: 10079156

Employer	
Employer's name	Clevedon Town Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Clevedon Town Council 44 Old Street CLEVEDON Avon BS21 6BU United Kingdom
Employer status	Active since 05 January 2009
Employer email address	

Employer	
Employer's name	Clifton Suspension Bridge Trust
Employer type	Participating Employer
Organisation type	Registered charity
Address of employer	Toll House Clifton Suspension Bridge Bridge Road Leigh Woods BRISTOL BS8 3PA United Kingdom
Employer status	Active since 31 March 1976
Employer email address	
Charities number	205658

Employer	
Employer's name	Clutton Primary School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Clutton Cp School Station Road Clutton BRISTOL BS39 5RA United Kingdom
Employer status	Active since 01 March 2015
Employer email address	
Companies House number	07365778

PSR number: 10079156

Employer	
Employer's name	Colston Primary School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Colstons Primary School 16-18 Cotham Grove BRISTOL BS6 6AL United Kingdom
Employer status	Active since 01 September 2012
Employer email address	
Companies House number	08144135

Employer	
Employer's name	Colston's Girls' School Trust
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Colston's Girls' School Academy Cheltenham Road BRISTOL BS6 5RD United Kingdom
Employer status	Active since 01 September 2012
Employer email address	
Companies House number	06511936

Employer	
Employer's name	Combe Down Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Combe Down Primary School The Log Cabin, Church Road Combe Down BATH BA2 5JQ United Kingdom
Employer status	Active since 01 July 2016
Employer email address	
Companies House number	08061092

PSR number: 10079156

Employer	
Employer's name	Compass Contract Services (UK) Ltd - BCC Catering Retender
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Parklands Court 24 Parklands Birmingham Great Park Birmingham B45 9PZ United Kingdom
Employer status	Active since 10 February 2018
Employer email address	
Companies House number	01790863

Employer	
Employer's name	Compass Contract Services (UK) Ltd - South Street School
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Parklands Court 24 Parklands Birmingham Great Park Birmingham B45 9PZ United Kingdom
Employer status	Active since 01 July 2018
Employer email address	
Companies House number	01790863

Employer	
Employer's name	Compass Contract Services (UK) Ltd - St Bede's Catholic Primary
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Parklands Court 24 Parklands Birmingham Great Park Birmingham B45 9PZ United Kingdom
Employer status	Active since 10 February 2018
Employer email address	
Companies House number	01790863

PSR number: 10079156

Employer	
Employer's name	Compass Contract Services (UK) Ltd - St Patrick's Catholic Primary School
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Parklands Court 24 Parklands Birmingham Great Park Birmingham B45 9PZ United Kingdom
Employer status	Active since 10 February 2018
Employer email address	
Companies House number	01790863

Employer	
Employer's name	Compass Contract Services (UK) Ltd - St Teresa's Catholic Primary School
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Parklands Court 24 Parklands Birmingham Great Park Birmingham B45 9PZ United Kingdom
Employer status	Active since 10 February 2018
Employer email address	
Companies House number	01790863

Employer	
Employer's name	Compass Contract Services (UK) Ltd - Westbury Park Primary School
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Parklands Court 24 Parklands Birmingham Great Park Birmingham B45 9PZ United Kingdom
Employer status	Active since 10 February 2018
Employer email address	
Companies House number	01790863

PSR number: 10079156

Employer	
Employer's name	Compass Palladian MAT
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Parklands Court 24 Parklands Birmingham Great Park Birmingham B45 9PZ United Kingdom
Employer status	Active since 01 September 2018
Employer email address	
Companies House number	02114954

Employer	
Employer's name	Congresbury Parish Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Congresbury Parish Council Old School Rooms Orchard House Station Road Congresbury BS49 5DX United Kingdom
Employer status	Active since 13 February 2012
Employer email address	

Employer	
Employer's name	Cotham School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Cotham Lawn Road Bristol BS6 6DT United Kingdom
Employer status	Active since 01 September 2011
Employer email address	
Companies House number	07732888
Employer membership	
Number of defined benefit members	0
Effective date	08 August 2011

PSR number: 10079156

Employer	
Employer's name	Court de Wyck Church School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bath & Wells MAT The Old Deanery Wells Somerset BA5 2UG United Kingdom
Employer status	Active since 01 December 2015
Employer email address	
Companies House number	08207095

Employer	
Employer's name	CQC Human Resources
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Care Quality Commission 7th Floor Citygate Gallowgate Newcastle Upon Tyne NE1 4PA United Kingdom
Employer status	Active since 02 April 1996
Employer email address	

Employer	
Employer's name	Creative Youth Network - South Gloucestershire Council Youth Service
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	20 Old School House The Kingswood Estate Britannia Road Bristol BS15 8DB United Kingdom
Employer status	Active since 01 April 2019
Employer email address	
Companies House number	01099684

PSR number: 10079156

Employer	
Employer's name	Creative Youth Network [The Station]
Employer type	Participating Employer
Organisation type	Registered charity
Address of employer	Kingswood Estate 20 Old School House Kingswood Foundation Estate Britannia Road Kingswood BS15 8DB United Kingdom
Employer status	Active since 01 June 2018
Employer email address	
Companies House number	01099684
Charities number	266318

Employer	
Employer's name	Crockerne Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Knightstone Road Weston Super Mare North Somerset BS23 2AL United Kingdom
Employer status	Active since 01 November 2016
Employer email address	
Companies House number	08329993

Employer	
Employer's name	Culverhill School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Culverhill School Kelston Close Yate BRISTOL BS37 8SZ United Kingdom
Employer status	Active since 01 July 2018
Employer email address	
Companies House number	11369471

PSR number: 10079156

Employer	
Employer's name	Destination Bristol
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	53 Queens Square Bristol BS1 4LH United Kingdom
Employer status	Active since 01 October 2001
Employer email address	
Companies House number	03715280

Employer	
Employer's name	Digitech Studio School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Federation House King's Oak Academy Brook Road Kingswood Bristol BS15 4JT United Kingdom
Employer status	Active since 01 September 2015
Employer email address	
Companies House number	06207590

Employer	
Employer's name	Diocese of Bristol (Outsource)
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Diocese of Bristol Unit 1500, Bristol Parkway North Newbrick Road, Stoke Gifford BRISTOL BS34 8YU United Kingdom
Employer status	Active since 01 April 2017
Employer email address	
Companies House number	08156759

PSR number: 10079156

Employer	
Employer's name	Direct Cleaning Services
Employer type	Participating Employer
Organisation type	Other
Address of employer	Unit 2 Leafield Industrial Estate Leasfield Way Corsham Wiltshire SN13 9RS United Kingdom
Employer status	Active since 01 June 2017
Employer email address	

Employer	
Employer's name	Disability Equality Forum
Employer type	Participating Employer
Organisation type	Other
Address of employer	Bristol Disability Equality Forum 94 Grosvenor Road BRISTOL BS2 8XJ United Kingdom
Employer status	Active since 01 October 2012
Employer email address	

Employer	
Employer's name	Dodington Parish Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Dodington Parish Hall Finch Road Chipping Sodbury Bristol BS37 6JZ United Kingdom
Employer status	Active since 12 August 1996
Employer email address	

Employer	
Employer's name	Dolce Ltd - Mangotsfield School
Employer type	Participating Employer
Organisation type	Other
Address of employer	5 Cromwell Business Park York Road Wetherby LS22 7SU United Kingdom
Employer status	Active since 01 November 2016
Employer email address	

PSR number: 10079156

Employer	
Employer's name	Downend & Bromley Heath Parish Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Parish Office Downend Library Buckingham Gardens Downend Bristol BS16 5TW United Kingdom
Employer status	Active since 19 November 2003
Employer email address	

Employer	
Employer's name	Downend School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	The Castle School Park Road Thornbury South Gloucestershire BS35 1HT United Kingdom
Employer status	Active since 01 March 2013
Employer email address	
Companies House number	08395990

Employer	
Employer's name	Dundry C of E Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	110 Dundry Lane Dundry BRISTOL BS41 8JE United Kingdom
Employer status	Active since 01 September 2015
Employer email address	
Companies House number	07365778

PSR number: 10079156

Employer	
Employer's name	E-ACT St Ursula's Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	The Orangery 28 Headlands Kettering NN15 7HP United Kingdom
Employer status	Active since 01 September 2011
Employer email address	
Companies House number	07610574

Employer	
Employer's name	East Harptree CEVC Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	East Harptree C of E Primary School Church Lane East Harptree BRISTOL BS40 6BD United Kingdom
Employer status	Active since 01 January 2019
Employer email address	
Companies House number	07662102

Employer	
Employer's name	East Harptree Primary - Catering Tender
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	East Harptree C of E Primary School Church Lane East Harptree BRISTOL BS40 6BD United Kingdom
Employer status	Active since 01 September 2018
Employer email address	
Companies House number	08397975

PSR number: 10079156

Employer	
Employer's name	Easton C of E Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Easton C E Academy Beaufort Street Easton BRISTOL BS5 0SQ United Kingdom
Employer status	Active since 01 September 2014
Employer email address	
Companies House number	08156759

Employer	
Employer's name	Edward & Ward St Keyna Primary
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Edwards & Ward Ltd The Old Stables Whitehill Road CROWBOROUGH East Sussex TN6 1JP United Kingdom
Employer status	Active since 01 September 2018
Employer email address	
Companies House number	03714522

Employer	
Employer's name	Edward & Ward St Marks
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	The Old Stables Whitehill Road CROWBOROUGH East Sussex TN6 1JP United Kingdom
Employer status	Active since 01 September 2018
Employer email address	
Companies House number	03714522

PSR number: 10079156

Employer	
Employer's name	Edwards & Ward (Henleaze)
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Henleaze Infant School Park Grove Westbury-on-Trym BRISTOL BS9 4LG United Kingdom
Employer status	Active since 28 October 2017
Employer email address	
Companies House number	03714522

Employer	
Employer's name	Edwards & Ward BWMAT
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	The Old Stables Whitehill Road CROWBOROUGH East Sussex TN6 1JP United Kingdom
Employer status	Active since 01 September 2018
Employer email address	
Companies House number	03714522

Employer	
Employer's name	Edwards & Wards Ltd – South Gloucestershire Council (Courtney Primary School)
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Edwards & Ward Ltd The Old Stables Whitehill Road CROWBOROUGH East Sussex TN6 1JP United Kingdom
Employer status	Active since 01 August 2019
Employer email address	
Companies House number	03714522

PSR number: 10079156

Employer	
Employer's name	Edwards and Ward Paulton Infant School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Edwards & Ward Ltd The Old Stables Whitehill Road CROWBOROUGH East Sussex TN6 1JP United Kingdom
Employer status	Active since 16 April 2018
Employer email address	
Companies House number	03714522

Employer	
Employer's name	Elmlea Junior School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	The Dell Westbury-on-Trym Bristol BS9 3UF United Kingdom
Employer status	Active since 01 July 2011
Employer email address	
Companies House number	07626956
Employer membership	
Number of defined benefit members	0
Effective date	09 May 2011

Employer	
Employer's name	Emersons Green Town Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Westerleigh Road Emersons Green Bristol BS16 7AN United Kingdom
Employer status	Active since 14 May 2005
Employer email address	

PSR number: 10079156

Employer	
Employer's name	Endeavour Academy Trust (Central Functions)
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Gosforth Road Southmead Bristol BS10 5DS United Kingdom
Employer status	Active since 01 April 2017
Employer email address	
Companies House number	08245853

Employer	
Employer's name	Endeavour Academy Trust (Outsourcings)
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Gosforth Road Southmead Bristol BS10 5DS United Kingdom
Employer status	Active since 01 April 2017
Employer email address	
Companies House number	08245853

Employer	
Employer's name	Evergreen Primary Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Kings Oak Academy Brook Road Kingswood BRISTOL BS15 4JT United Kingdom
Employer status	Active since 01 September 2018
Employer email address	
Companies House number	06207590

PSR number: 10079156

Employer	
Employer's name	Expedite Complete Business Solutions Ltd - CLT
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	3 Quad East Warne Road Weston Super Mare BS22 9RR United Kingdom
Employer status	Active since 01 August 2020
Employer email address	
Companies House number	11314604

Employer	
Employer's name	Fairfield Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Graham Hill Marlborough Wiltshire SN8 4AV United Kingdom
Employer status	Active since 01 February 2015
Employer email address	
Companies House number	08146633

Employer	
Employer's name	Fairlawn School – CSGT
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Colston Girls School Trust Cheltenham Road Bristol BS6 5RD United Kingdom
Employer status	Active since 01 September 2015
Employer email address	
Companies House number	06511936

PSR number: 10079156

Employer	
Employer's name	Farmborough CofE VC Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Mulberry Lodge c/o Fosse Way School Longfellow Road Radstock Bath BA3 3AL United Kingdom
Employer status	Active since 01 November 2017
Employer email address	
Companies House number	07728112

Employer	
Employer's name	Farrington Gurney C of E Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Farrington Gurney C of E Primary School Church Lane Farrington Gurney BRISTOL BS39 6TY United Kingdom
Employer status	Active since 01 April 2017
Employer email address	
Companies House number	07365778

Employer	
Employer's name	Filton Avenue Primary School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Trust House Teyfant Road Bristol BS13 0RG United Kingdom
Employer status	Active since 01 September 2012
Employer email address	
Companies House number	08089704

PSR number: 10079156

Employer	
Employer's name	Filton Hill Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bradley Stoke Community School Fiddlers Wood Lane Bradley Stoke Bristol BS32 9BS United Kingdom
Employer status	Active since 01 September 2016
Employer email address	
Companies House number	07844791

Employer	
Employer's name	Filton Town Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Clerkto The Council Filton Sports Complex Elm Pk Filton Bristol BS12 7PS United Kingdom
Employer status	Active since 01 December 1973
Employer email address	

Employer	
Employer's name	Fishponds C of E Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Fishponds C of E Academy Fishponds Road Fishponds BRISTOL BS16 3UH United Kingdom
Employer status	Active since 01 October 2012
Employer email address	
Companies House number	08156759

PSR number: 10079156

Employer	
Employer's name	Flax Bourton CE Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Gordano School St. Marys Road Portishead BRISTOL BS20 7QR United Kingdom
Employer status	Active since 01 October 2018
Employer email address	
Companies House number	07662102

Employer	
Employer's name	Fonthill Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Fonthill Primary School Ascot Road BRISTOL BS10 5SW United Kingdom
Employer status	Active since 01 July 2018
Employer email address	
Companies House number	08245853

Employer	
Employer's name	Fosse Way School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Longfellow Road Radstock BA3 3AL United Kingdom
Employer status	Active since 01 September 2011
Employer email address	
Companies House number	07728112
Employer membership	
Number of defined benefit members	0
Effective date	03 August 2011

PSR number: 10079156

Employer	
Employer's name	Frampton Cotterell Parish Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	The Bockeridge Centre Woodend Road Frampton Cotterell BS36 2LQ United Kingdom
Employer status	Active since 01 July 1974
Employer email address	

Employer	
Employer's name	Freshford CE Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Freshford Church School High Street Freshford BATH BA2 7WE United Kingdom
Employer status	Active since 01 April 2018
Employer email address	
Companies House number	08207095

Employer	
Employer's name	FromeVale Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Federation House King's Oak Academy Brook Road Kingswood Bristol BS15 4JT United Kingdom
Employer status	Active since 01 September 2012
Employer email address	
Companies House number	06561073

PSR number: 10079156

Employer	
Employer's name	Future Cleaning Services
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Opus Avenue Nether Poppleton York YO26 6BL United Kingdom
Employer status	Active since 01 February 2017
Employer email address	
Companies House number	05065194

Employer	
Employer's name	Future Stars Club Ltd
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	11 Halswell Road CLEVEDON Avon BS21 6LD United Kingdom
Employer status	Active since 01 September 2017
Employer email address	
Companies House number	08037059

Employer	
Employer's name	Gatehouse Green (Central Functions)
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Redland Court Road BRISTOL BS6 7EH United Kingdom
Employer status	Active since 01 October 2019
Employer email address	
Companies House number	08203318

PSR number: 10079156

Employer	
Employer's name	Gatehouse Green Learning Trust
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Redland Court Road Redland BRISTOL BS6 7EH United Kingdom
Employer status	Active since 01 October 2012
Employer email address	
Companies House number	08203318

Employer	
Employer's name	Glen Cleaning Company Limited - Cotham School
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Glen Cleaning Co Ltd 2 Britannia Buildings Merchants Road, Hotwells BRISTOL BS8 4QD United Kingdom
Employer status	Active since 01 April 2020
Employer email address	
Companies House number	01582924

Employer	
Employer's name	Glen Cleaning Company Limited - Excalibur Academies Trust
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	2 Britannia Buildings Merchant Road Hotwells Bristol BS8 4QD United Kingdom
Employer status	Active since 01 January 2021
Employer email address	
Companies House number	01582924
Employer Pension Scheme Reference (EPSR)	998

PSR number: 10079156

Employer	
Employer's name	Glen Cleaning Company Limited – Lighthouse Schools Partnership (Backwell Hub Schools)
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Glen Cleaning Co Ltd 2 Britannia Buildings Merchants Road, Hotwells BRISTOL BS8 4QD United Kingdom
Employer status	Active since 01 April 2019
Employer email address	
Companies House number	01582924

Employer	
Employer's name	Gordano School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	St. Marys Road Portishead BRISTOL BS20 7QR United Kingdom
Employer status	Active since 01 July 2011
Employer email address	
Companies House number	07662102
Employer membership	
Number of defined benefit members	0
Effective date	08 June 2011

Employer	
Employer's name	Greenfield E-Act Primary Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	The Orangery 28 Headlands Kettering NN15 7HP United Kingdom
Employer status	Active since 01 September 2012
Employer email address	
Companies House number	07610574

PSR number: 10079156

Employer	
Employer's name	Greenwich Leisure Ltd - North Somerset Council
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Taunton Deane Borough Council The Deane House Belvedere Road TAUNTON Somerset TA1 1HE United Kingdom
Employer status	Active since 01 April 2011
Employer email address	
Companies House number	06279297

Employer	
Employer's name	Greenwich Leisure Ltd (GLL)
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Greenwich Leisure Ltd Middlegate House 1 Seymour Street LONDON SE18 6SX United Kingdom
Employer status	Active since 01 July 2015
Employer email address	
Companies House number	06279297

Employer	
Employer's name	Grove Junior School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Grove Junior School White Oak Way Nailsea BRISTOL BS48 4YZ United Kingdom
Employer status	Active since 01 April 2018
Employer email address	
Companies House number	07662102

PSR number: 10079156

Employer	
Employer's name	Hanham Abbots Parish Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	34 Hawthorn Close Pucklechurch BRISTOL BS16 9SZ United Kingdom
Employer status	Active since 01 June 2008
Employer email address	

Employer	
Employer's name	Hanham Parish Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	10 Tyler Close BRISTOL BS15 9NG United Kingdom
Employer status	Active since 01 December 2003
Employer email address	

Employer	
Employer's name	Hanham Woods Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Federation House King's Oak Academy Brook Road Kingswood Bristol BS15 4JT United Kingdom
Employer status	Active since 01 September 2014
Employer email address	
Companies House number	06561073

PSR number: 10079156

Employer	
Employer's name	Hannah More Infant School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Hannah More County Infant School White Oak Way Nailsea BRISTOL BS48 4YZ United Kingdom
Employer status	Active since 01 April 2018
Employer email address	
Companies House number	07662102

Employer	
Employer's name	Hans Price Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Federation House King's Oak Academy Brook Road Kingswood Bristol BS15 4JT United Kingdom
Employer status	Active since 01 May 2011
Employer email address	
Companies House number	06207590
Employer membership	
Number of defined benefit members	0
Effective date	01 May 2011

Employer	
Employer's name	Hareclive Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	The Orangery 28 Headlands Kettering NN15 7HP United Kingdom
Employer status	Active since 01 August 2012
Employer email address	
Companies House number	08107672

PSR number: 10079156

Employer	
Employer's name	Hayesfield Girls School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Upper Oldfield Park Bath BA2 3LA United Kingdom
Employer status	Active since 01 September 2011
Employer email address	
Companies House number	07671637
Employer membership	
Number of defined benefit members	0
Effective date	15 June 2011

Employer	
Employer's name	Haywood Village Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Federation House King's Oak Academy Brook Road Kingswood Bristol BS15 4JT United Kingdom
Employer status	Active since 01 September 2016
Employer email address	
Companies House number	06207590

Employer	
Employer's name	Headley Park Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	ABBOTSGATE HOUSE HOLLOW ROAD BURY ST EDMUNDS SUFFOLK IP32 7FA United Kingdom
Employer status	Active since 01 August 2017
Employer email address	
Companies House number	06516626

PSR number: 10079156

Employer	
Employer's name	Henbury Court Primary Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Henbury Court Primary School Trevelyan Walk BRISTOL BS10 7NY United Kingdom
Employer status	Active since 01 April 2013
Employer email address	
Companies House number	08245853

Employer	
Employer's name	Henbury School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Henbury School Academy Station Road Henbury BRISTOL BS10 2QH United Kingdom
Employer status	Active since 01 June 2012
Employer email address	
Companies House number	07838126

Employer	
Employer's name	Henleaze Junior School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Henleaze Academy Park Grove Westbury-on-Trym BRISTOL BS9 4LG United Kingdom
Employer status	Active since 01 October 2011
Employer email address	
Companies House number	07763421

PSR number: 10079156

Employer	
Employer's name	Heron's Moor Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Knightstone Road Weston Super Mare North Somerset BS23 2AL United Kingdom
Employer status	Active since 01 September 2012
Employer email address	
Companies House number	08141361

Employer	
Employer's name	High Down Infant School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	St Marys Road Portishead Bristol BS20 7QR United Kingdom
Employer status	Active since 01 September 2016
Employer email address	
Companies House number	07662102

Employer	
Employer's name	High Down Junior School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	St Marys Road Portishead Bristol BS20 7QR United Kingdom
Employer status	Active since 01 September 2016
Employer email address	
Companies House number	07662102

PSR number: 10079156

Employer	
Employer's name	High Littleton C of E Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	High Littleton School Church Street High Littleton BRISTOL BS39 6HF United Kingdom
Employer status	Active since 01 August 2014
Employer email address	
Companies House number	07365778

Employer	
Employer's name	Holbourne Menstrie Museum
Employer type	Participating Employer
Organisation type	Other
Address of employer	University Of Bath The Virgil Building Manvers Street Bath BA1 1JW United Kingdom
Employer status	Active since 01 April 1996
Employer email address	

Employer	
Employer's name	Home Life Carers Ltd
Employer type	Participating Employer
Organisation type	Other
Address of employer	Cardinal House Abbeyfield Court Abbeyfield Road Nottingham NG7 2SZ United Kingdom
Employer status	Active since 29 March 2021
Employer email address	
Companies House number	05795650
Employer Pension Scheme Reference (EPSR)	7015

PSR number: 10079156

Employer	
Employer's name	Hotwells Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Hotwells Primary School Hope Chapel Hill BRISTOL BS8 4ND United Kingdom
Employer status	Active since 01 April 2014
Employer email address	
Companies House number	08920557

Employer	
Employer's name	Hutton Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Hutton Primary School Church Lane Hutton WESTON-SUPER-MARE Avon BS24 9SN United Kingdom
Employer status	Active since 01 September 2017
Employer email address	
Companies House number	10885386

Employer	
Employer's name	IKB Studio School (Wellsway MAT)
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Wellsway MAT Chandag Road Keynsham BRISTOL BS31 1PH United Kingdom
Employer status	Active since 01 September 2015
Employer email address	
Companies House number	07746787

PSR number: 10079156

Employer	
Employer's name	Ilminster Avenue E-ACT Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	The Orangery 28 Headlands Kettering NN15 7HP United Kingdom
Employer status	Active since 01 January 2012
Employer email address	
Companies House number	07610574

Employer	
Employer's name	Imperial Cleaning Services Ltd - The Tynings Primary School
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	65 St Marys Street Chippenham Wiltshire SN15 3JF United Kingdom
Employer status	Active since 24 May 2021
Employer email address	
Companies House number	04669917
Employer Pension Scheme Reference (EPSR)	7012

Employer	
Employer's name	Innovate Gatehouse Green LT
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Innovate Ltd Phoenix House Pyrford Road WEST BYFLEET Surrey KT14 6RA United Kingdom
Employer status	Active since 02 May 2020
Employer email address	
Companies House number	06420662

PSR number: 10079156

Employer	
Employer's name	Innovate Services Ltd - Cathedral Schools Trust
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Innovate Ltd Phoenix House Pyrford Road WEST BYFLEET Surrey KT14 6RA United Kingdom
Employer status	Active since 01 September 2020
Employer email address	
Companies House number	06420662

Employer	
Employer's name	Keynsham Town Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	15 - 17 Temple Street Keynsham Bristol BS31 1HF United Kingdom
Employer status	Active since 23 March 1992
Employer email address	

Employer	
Employer's name	Kings Oak Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Federation House John Cabot Academy Woodside Road Kingswood Bristol BS15 8DB United Kingdom
Employer status	Active since 01 September 2011
Employer email address	
Companies House number	06561073

PSR number: 10079156

Employer	
Employer's name	Kingshill CofE Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bath & Wells Diocesan Board of Finance The Old Deanery WELLS Somerset BA5 2UG United Kingdom
Employer status	Active since 01 April 2013
Employer email address	
Companies House number	08207095

Employer	
Employer's name	Knowle DGE Learning Centre
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Knowle D G E Learning Centre Leinster Avenue BRISTOL BS4 1NN United Kingdom
Employer status	Active since 01 September 2017
Employer email address	
Companies House number	10377760

Employer	
Employer's name	L P W Ltd (CAB)
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Learning Partnership West L P W House, Princess Street Bedminster BRISTOL BS3 4AG United Kingdom
Employer status	Active since 01 April 2016
Employer email address	
Companies House number	02911928

PSR number: 10079156

Employer	
Employer's name	Lansdown Park School (PRU)
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Lansdown Park Secondary Specialist Provision Stockwood Lane BRISTOL BS14 8SJ United Kingdom
Employer status	Active since 01 September 2017
Employer email address	
Companies House number	10377760

Employer	
Employer's name	Lex Leisure C.I.C
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Kendall Wadley LLP Granta Lodge 71 Graham Road MALVERN Worcestershire WR14 2JS United Kingdom
Employer status	Active since 08 January 2018
Employer email address	
Companies House number	10690651

Employer	
Employer's name	Liberata UK Limited
Employer type	Participating Employer
Organisation type	Other
Address of employer	PO Box 1598 Croydon CR9 6LL United Kingdom
Employer status	Active since 01 October 2010
Employer email address	
Employer membership	
Number of defined benefit members	0
Effective date	16 March 2006

PSR number: 10079156

Employer	
Employer's name	Little Acorn Trust (Four Acres Primary School)
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Four Acres Academy Four Acres BRISTOL BS13 8RB United Kingdom
Employer status	Active since 01 February 2015
Employer email address	
Companies House number	09207180

Employer	
Employer's name	Little Mead Primary Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Little Mead Academy Trust Gosforth Road BRISTOL BS10 6DS United Kingdom
Employer status	Active since 01 November 2012
Employer email address	
Companies House number	08245853

Employer	
Employer's name	Locking Primary Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Selworthy Drive Weston Super Mare BS23 3ST United Kingdom
Employer status	Active since 01 October 2017
Employer email address	
Companies House number	10896504

PSR number: 10079156

Employer	
Employer's name	Longvernal Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Longvernal Primary School Clapton Road Midsomer Norton RADSTOCK BA3 2LP United Kingdom
Employer status	Active since 01 July 2016
Employer email address	
Companies House number	07365778

Employer	
Employer's name	Luckwell Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Parklands Court 24 Parklands Birmingham Great Park Rubery Birmingham B45 9PZ United Kingdom
Employer status	Active since 01 July 2018
Employer email address	
Companies House number	01790863

Employer	
Employer's name	Lyde Green Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	The Castle School Park Road Thornbury South Gloucestershire BS35 1HT United Kingdom
Employer status	Active since 01 September 2016
Employer email address	
Companies House number	08397975

PSR number: 10079156

Employer	
Employer's name	Mangotsfield School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	The Castle School Park Road Thornbury South Gloucestershire BS35 1HT United Kingdom
Employer status	Active since 01 September 2015
Employer email address	
Companies House number	08397975

Employer	
Employer's name	Marksbury CofE Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Mulberry Lodge c/o Fosse Way School Longfellow Road Radstock Bath BA3 3AL United Kingdom
Employer status	Active since 01 July 2017
Employer email address	
Companies House number	07728112

Employer	
Employer's name	Marlwood School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	The Castle School Park Road Thornbury BRISTOL BS35 1HT United Kingdom
Employer status	Active since 01 November 2014
Employer email address	
Companies House number	08397975

PSR number: 10079156

Employer	
Employer's name	Mary Elton Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	c/o Clevedon School Valley Road Clevedon BS21 6AH United Kingdom
Employer status	Active since 01 April 2017
Employer email address	
Companies House number	07872799

Employer	
Employer's name	Mead Vale Community Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	School House Selworthy Road WESTON-SUPER-MARE Avon BS23 3ST United Kingdom
Employer status	Active since 01 February 2018
Employer email address	
Companies House number	10896504

Employer	
Employer's name	Meadowbrook Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bradley Stoke Community School Fiddlers Wood Lane Bradley Stoke Bristol BS32 9BS United Kingdom
Employer status	Active since 01 January 2015
Employer email address	
Companies House number	07844791

PSR number: 10079156

Employer	
Employer's name	Mendip Green Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	School House Selworth Road Weston-Super-Mare BS23 3ST United Kingdom
Employer status	Active since 01 September 2018
Employer email address	
Companies House number	10896504

Employer	
Employer's name	Mendip Studio School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	C/O Midsomer Norton Schools Partnership Charlton Road Midsomer Norton BA3 4AD United Kingdom
Employer status	Active since 01 September 2020
Employer email address	
Companies House number	07365778
Employer Pension Scheme Reference (EPSR)	611

Employer	
Employer's name	Mentoring Plus
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Riverside Youth Hub York Place London Road BATH BA1 6AE United Kingdom
Employer status	Active since 20 August 2018
Employer email address	
Companies House number	05589316

PSR number: 10079156

Employer	
Employer's name	Merchants Academy Trust
Employer type	Participating Employer
Organisation type	Registered charity
Address of employer	Gatehouse Avenue Withywood Bristol BS13 9AJ United Kingdom
Employer status	Active since 01 September 2008
Employer email address	
Charities number	1112261

Employer	
Employer's name	Merlin Housing Society Limited (SG Council)
Employer type	Participating Employer
Organisation type	Public limited company
Address of employer	Building 2 Riverside Court Bowling Hill Chipping Sodbury BS37 6JX United Kingdom
Employer status	Active since 01 October 2008
Employer email address	
Companies House number	IP30012R

Employer	
Employer's name	Merlin Housing Society Ltd (New Staff)
Employer type	Participating Employer
Organisation type	Public limited company
Address of employer	Merlin Housing Society 1 Riverside Court Bowling Hill, Chipping Sodbury BRISTOL BS37 6JX United Kingdom
Employer status	Active since 01 October 2008
Employer email address	
Companies House number	IP30012R

PSR number: 10079156

Employer	
Employer's name	Midsomer Norton Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Midsomer Norton Primary School High Street Midsomer Norton RADSTOCK BA3 2DR United Kingdom
Employer status	Active since 01 September 2017
Employer email address	
Companies House number	07365778

Employer	
Employer's name	Midsomer Norton Schools Partnership
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	4 Charlton Road Midsomer Norton RADSTOCK BA3 4AD United Kingdom
Employer status	Active since 01 October 2010
Employer email address	
Companies House number	07365778
Employer membership	
Number of defined benefit members	0
Effective date	06 September 2010

Employer	
Employer's name	Midsomer Norton Town Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Town Hall The Island Midsomer Norton Radstock BA3 2HQ United Kingdom
Employer status	Active since 01 April 2011
Employer email address	
Employer membership	
Number of defined benefit members	0
Effective date	01 April 2011

PSR number: 10079156

Employer	
Employer's name	Milton Park Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Selworthy Road Weston Super Mare BS23 3ST United Kingdom
Employer status	Active since 01 October 2017
Employer email address	
Companies House number	10896504

Employer	
Employer's name	Minerva Primary Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Federation House King's Oak Academy Brook Road Kingswood Bristol BS15 4JT United Kingdom
Employer status	Active since 01 September 2012
Employer email address	
Companies House number	06561073

Employer	
Employer's name	Moorlands Infant School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Mullberry Lodge c/o Fosse Way School Longfellow Road Radstock BA3 3AL United Kingdom
Employer status	Active since 01 March 2017
Employer email address	
Companies House number	07728112

PSR number: 10079156

Employer	
Employer's name	Moorlands Junior School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Mulberry Lodge c/o Fosse Way School Longfellow Road Radstock BA3 3AL United Kingdom
Employer status	Active since 01 March 2017
Employer email address	
Companies House number	07728112

Employer	
Employer's name	Mulberry Park Educate Together Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Mulberry Park Educate Together Primary Academy Mulberry Way BATH BA2 5BU United Kingdom
Employer status	Active since 01 September 2018
Employer email address	
Companies House number	08859774

Employer	
Employer's name	Nailsea School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Nailsea School Mizzymeard Road Nailsea BRISTOL BS48 2HN United Kingdom
Employer status	Active since 01 August 2012
Employer email address	
Companies House number	08084047

PSR number: 10079156

Employer	
Employer's name	Nailsea Town Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Tithe Barn Church Lane Nailsea Bristol BS48 4NG United Kingdom
Employer status	Active since 01 November 1986
Employer email address	

Employer	
Employer's name	New Siblands School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	New Siblands School Easton Hill Road Thornbury BRISTOL BS35 2JU United Kingdom
Employer status	Active since 01 July 2018
Employer email address	
Companies House number	11369471

Employer	
Employer's name	Nobilis Care West Limited
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Nobilis Care Ltd Unit 307, Solent Business Centre 343 Millbrook Road West SOUTHAMPTON SO15 0HW United Kingdom
Employer status	Active since 01 April 2019
Employer email address	
Companies House number	05100079

PSR number: 10079156

Employer	
Employer's name	North Somerset Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Town Hall Walliscote Grove Road Weston Super Mare BS23 1UJ United Kingdom
Employer status	Active since 01 April 1996
Employer email address	

Employer	
Employer's name	North Somerset Enterprise & Technology College
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Knightstone Road Weston Super Mare North Somerset BS23 2AL United Kingdom
Employer status	Active since 01 September 2014
Employer email address	
Companies House number	08329993

Employer	
Employer's name	Northleaze C of E Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Northleaze Primary School Brook Close Long Ashton BRISTOL BS41 9NG United Kingdom
Employer status	Active since 01 February 2018
Employer email address	
Companies House number	07662102

PSR number: 10079156

Employer	
Employer's name	Norton Hill Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Norton Hill Primary School Silver Street Midsomer Norton RADSTOCK BA3 2UD United Kingdom
Employer status	Active since 01 September 2020
Employer email address	
Companies House number	07365778

Employer	
Employer's name	Notton House Residential School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Notton House School 28 Notton Lacock CHIPPENHAM Wiltshire SN15 2NF United Kingdom
Employer status	Active since 01 September 2017
Employer email address	
Companies House number	10377760

Employer	
Employer's name	Oasis Academy Bank Leaze
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	1 Kennington Road London SE1 7QP United Kingdom
Employer status	Active since 01 September 2012
Employer email address	
Companies House number	05398529

PSR number: 10079156

Employer	
Employer's name	Oasis Academy Brightstowe
Employer type	Participating Employer
Organisation type	Other
Address of employer	1 Kennington Road London SE1 7QP United Kingdom
Employer status	Active since 01 September 2008
Employer email address	
Companies House number	05398529

Employer	
Employer's name	Oasis Academy Brislington Enterprise College
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	1 Kennington Road London SE1 7QP United Kingdom
Employer status	Active since 01 February 2015
Employer email address	
Companies House number	05398529

Employer	
Employer's name	Oasis Academy Connaught
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	1 Kennington Road London SE1 7QP United Kingdom
Employer status	Active since 01 September 2012
Employer email address	
Companies House number	05398529

Employer	
Employer's name	Oasis Academy John Williams
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	1 Kennington Road London SE1 7QP United Kingdom
Employer status	Active since 01 September 2008
Employer email address	
Companies House number	05398529

PSR number: 10079156

Employer	
Employer's name	Oasis Academy Long Cross
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	1 Kennington Road London SE1 7QP United Kingdom
Employer status	Active since 01 January 2014
Employer email address	
Companies House number	05398529

Employer	
Employer's name	Oasis Academy Marksbury Road
Employer type	Participating Employer
Organisation type	Other
Address of employer	1 Kennington Road London SE1 7QP United Kingdom
Employer status	Active since 01 September 2015
Employer email address	
Companies House number	05398529

Employer	
Employer's name	Oasis Academy New Oak
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	1 Kennington Road London SE1 7QP United Kingdom
Employer status	Active since 01 September 2012
Employer email address	
Companies House number	05398529

Employer	
Employer's name	Old Mixon Primary Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Selworthy Road Weston Super Mare BS23 3ST United Kingdom
Employer status	Active since 01 October 2017
Employer email address	
Companies House number	10896504

PSR number: 10079156

Employer	
Employer's name	Oldfield Park Infant School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Ralph Allen School Claverton Down Road Combe Down BATH BA2 7AD United Kingdom
Employer status	Active since 01 November 2016
Employer email address	
Companies House number	08061092

Employer	
Employer's name	Oldfield Park Junior School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Ralph Allen School Claverton Down Road Combe Down BATH BA2 7AD United Kingdom
Employer status	Active since 01 November 2016
Employer email address	
Companies House number	08061092

Employer	
Employer's name	Oldfield School Academy Trust
Employer type	Participating Employer
Organisation type	Other
Address of employer	Kelston Road Bath BA1 9AB United Kingdom
Employer status	Active since 01 February 2011
Employer email address	
Companies House number	07495165

PSR number: 10079156

Employer	
Employer's name	Oldland Parish Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	28 Brunel Close Bridgegate Bristol BS30 5BB United Kingdom
Employer status	Active since 01 April 2003
Employer email address	

Employer	
Employer's name	Olympus Academy Trust (Central Functions)
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Fiddlers Wood Lane Bradley Stoke Bristol BS32 9BS United Kingdom
Employer status	Active since 01 April 2017
Employer email address	
Companies House number	07844791

Employer	
Employer's name	Olympus Academy Trust (Outsourcings)
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Fiddlers Wood Lane Bradley Stoke Bristol BS32 9BS United Kingdom
Employer status	Active since 01 April 2017
Employer email address	
Companies House number	07844791

PSR number: 10079156

Employer	
Employer's name	Orchard Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Trust House Teyfant Road Bristol BS13 0RG United Kingdom
Employer status	Active since 01 September 2012
Employer email address	
Companies House number	08089704

Employer	
Employer's name	Parklands Educate Together Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Mulberry Park Educate Together Primary Academy Mulberry Way BATH BA2 5BU United Kingdom
Employer status	Active since 01 September 2018
Employer email address	
Companies House number	08859774

Employer	
Employer's name	Parson Street Primary School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Trust House Teyfant Road Bristol BS13 0RG United Kingdom
Employer status	Active since 01 November 2012
Employer email address	
Companies House number	08245920

PSR number: 10079156

Employer	
Employer's name	Patchway Community College
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Patchway Community College Hempton Lane Almondsbury BRISTOL BS32 4AJ United Kingdom
Employer status	Active since 01 November 2013
Employer email address	
Companies House number	08663011

Employer	
Employer's name	Patchway Town Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Callicroft House Rodway Road Patchway South Gloucestershire BS34 5DQ United Kingdom
Employer status	Active since 01 April 1990
Employer email address	

Employer	
Employer's name	Paulton Infants School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Fosse Way School Longfellow Road Westfield RADSTOCK BA3 3AL United Kingdom
Employer status	Active since 01 October 2020
Employer email address	
Companies House number	07728112
Employer Pension Scheme Reference (EPSR)	919

PSR number: 10079156

Employer	
Employer's name	Paulton Parish Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	The Village Hall Farrington Road Paulton BS39 7LW United Kingdom
Employer status	Active since 01 January 1995
Employer email address	

Employer	
Employer's name	Peasedown St John Parish Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Beacon Hall French Close Peasedown St John Bath BA2 8SN United Kingdom
Employer status	Active since 22 May 2006
Employer email address	
Employer membership	
Number of defined benefit members	0
Effective date	01 April 2011

Employer	
Employer's name	Peasedown St John Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Knobsbury Lane Writhlington BA3 3NG United Kingdom
Employer status	Active since 01 April 2016
Employer email address	
Companies House number	07728482

PSR number: 10079156

Employer	
Employer's name	Pensford Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Pensford Primary School Pensford Hill Pensford BRISTOL BS39 4AA United Kingdom
Employer status	Active since 01 June 2019
Employer email address	
Companies House number	07728112

Employer	
Employer's name	Perry Court Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	The Orangery 28 Headlands Kettering NN15 7HP United Kingdom
Employer status	Active since 01 September 2017
Employer email address	
Companies House number	07610574

Employer	
Employer's name	Pill & Easton In Gordano Parish Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	The Resource Centre 4 Baltic Place Pill BRISTOL BS20 0EJ United Kingdom
Employer status	Active since 14 September 2009
Employer email address	

PSR number: 10079156

Employer	
Employer's name	Portishead Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	St Mary's Road Portishead Bristol BS20 7QR United Kingdom
Employer status	Active since 01 September 2016
Employer email address	
Companies House number	07662102

Employer	
Employer's name	Portishead Town Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Clerk Of The Council Folk Hall High Street Portishead Bristol BS20 9PR United Kingdom
Employer status	Active since 01 January 2013
Employer email address	

Employer	
Employer's name	Prestige Clean & Maint ELAN MAT
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	School House Selworthy Road WESTON-SUPER-MARE Avon BS23 3ST United Kingdom
Employer status	Active since 01 September 2020
Employer email address	
Companies House number	06972053

PSR number: 10079156

Employer	
Employer's name	Prestige Cleaning & Maintenance Ltd
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Prestige Cleaning & Maintenance Ltd Unit 1, Highbury Farm Business Park Hallatrow BRISTOL BS39 6EH United Kingdom
Employer status	Active since 01 June 2014
Employer email address	
Companies House number	06972053

Employer	
Employer's name	Purgo Supply Services Ltd – E-ACT
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Suite 3, Middlesex House Rutherford Close STEVENAGE Hertfordshire SG1 2EF United Kingdom
Employer status	Active since 01 September 2019
Employer email address	
Companies House number	08665358

Employer	
Employer's name	Purgo Supply Services Ltd - Gatehouse Green Learning Trust
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Suite 3, Middlesex House Rutherford Close STEVENAGE Hertfordshire SG1 2EF United Kingdom
Employer status	Active since 01 June 2020
Employer email address	
Companies House number	08665358

PSR number: 10079156

Employer	
Employer's name	Radstock Town Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Leigh House 1 Wells Hill Radstock Bath BA3 3RN United Kingdom
Employer status	Active since 01 April 2011
Employer email address	
Employer membership	
Number of defined benefit members	0
Effective date	01 April 2011

Employer	
Employer's name	Ralph Allen School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Ralph Allen School Claverton Down Road Combe Down BATH BA2 7AD United Kingdom
Employer status	Active since 01 August 2012
Employer email address	
Companies House number	08061092

Employer	
Employer's name	Redfield Educate Together Primary Academy
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Redfield Educate Together Primary Academy Avonvale Road BRISTOL BS5 9RH United Kingdom
Employer status	Active since 01 September 2014
Employer email address	
Companies House number	08859774

PSR number: 10079156

Employer	
Employer's name	Relyon Cleaning Services - Colston's Primary Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Unit A7 Redham Works Redham Works Redham Lane Pilning Bristol BS35 4HQ United Kingdom
Employer status	Active since 05 February 2016
Employer email address	
Companies House number	05057258

Employer	
Employer's name	Ridge Crest Cleaning Ltd
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Ridge Crest Cleaning Ltd Service House 61-63 Rochester Road AYLESFORD Kent ME20 7BS United Kingdom
Employer status	Active since 15 February 2015
Employer email address	
Companies House number	02907221

Employer	
Employer's name	Roundhill Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Fosse Way School Longfellow Road Westfield RADSTOCK BA3 3AL United Kingdom
Employer status	Active since 01 December 2018
Employer email address	
Companies House number	07728112

PSR number: 10079156

Employer	
Employer's name	Saltford C of E Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Chandag Road Keynsham Bristol BS31 1PH United Kingdom
Employer status	Active since 01 September 2016
Employer email address	
Companies House number	07746787

Employer	
Employer's name	Saltford Parish Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Saltford Library 478a Bath Road Saltford BRISTOL BS31 3BU United Kingdom
Employer status	Active since 01 February 2006
Employer email address	

Employer	
Employer's name	Severn Beach Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	The Castle School Park Road Thornbury South Gloucestershire BS35 1HT United Kingdom
Employer status	Active since 01 September 2014
Employer email address	
Companies House number	01134697

PSR number: 10079156

Employer	
Employer's name	SGS Pegasus School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Hempton Lane Almondsbury Bristol BS32 4AJ United Kingdom
Employer status	Active since 01 September 2017
Employer email address	
Companies House number	09353480

Employer	
Employer's name	Shoscombe Church School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Shoscombe Church School St Julians Road Shoscombe Bath BA2 8MB United Kingdom
Employer status	Active since 01 December 2018
Employer email address	
Companies House number	07728482

Employer	
Employer's name	Sir Bernard Lovell School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	c/o Malcolm Biggs Chandag Road Keynsham Bristol BS31 1PH United Kingdom
Employer status	Active since 01 April 2015
Employer email address	
Companies House number	07746787

PSR number: 10079156

Employer	
Employer's name	Sirona Care & Health (Telecare)
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Kingswood Civic Centre Kingswood Bristol BS15 9TR United Kingdom
Employer status	Active since 01 October 2020
Employer email address	
Companies House number	07585003
Employer Pension Scheme Reference (EPSR)	972

Employer	
Employer's name	Sirona Care & Health CIC
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Lower Ground Floor Kingswood Civic Centre Kingswood Bristol BS15 9RT United Kingdom
Employer status	Active since 01 April 2017
Employer email address	
Companies House number	07585003

Employer	
Employer's name	SITA UK Ltd
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	SUEZ House Grenfell Road Maidenhead Berks SL6 1EF United Kingdom
Employer status	Active since 31 July 2000
Employer email address	
Companies House number	01846807

PSR number: 10079156

Employer	
Employer's name	Skanska Rashleigh Weatherfoil Ltd
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Maple Cross House Denhamway Rickmansworth WD3 9SW United Kingdom
Employer status	Active since 03 July 2006
Employer email address	
Companies House number	00798550

Employer	
Employer's name	SLM Community Leisure
Employer type	Participating Employer
Organisation type	Other
Address of employer	2 Watling Drive Hinckley Leicester LE10 3EY United Kingdom
Employer status	Active since 01 October 2006
Employer email address	
Companies House number	IP30005R

Employer	
Employer's name	SLM Fitness & Health
Employer type	Participating Employer
Organisation type	Other
Address of employer	2 Watling Drive Hinckley Leicester LE10 3EY United Kingdom
Employer status	Active since 01 October 2006
Employer email address	
Companies House number	IP30005R

PSR number: 10079156

Employer	
Employer's name	Sodbury Town Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	The Old Reading Rooms 26 High Street Chipping Sodbury BRISTOL BS37 6AH United Kingdom
Employer status	Active since 01 June 2018
Employer email address	

Employer	
Employer's name	Somerdale Educate Together Priamry Academy (Free School)
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Fry Club & Conference Centre Somerdale Keynsham BRISTOL BS31 2AU United Kingdom
Employer status	Active since 01 September 2017
Employer email address	
Companies House number	08859774

Employer	
Employer's name	Soundwell Academy - Learn
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Knowle D G E Learning Centre Leinster Avenue BRISTOL BS4 1NN United Kingdom
Employer status	Active since 01 September 2020
Employer email address	
Companies House number	10377760

PSR number: 10079156

Employer	
Employer's name	South Gloucestershire & Stroud College
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Filton Avenue Filton Bristol BS34 7AT United Kingdom
Employer status	Active since 01 April 2013
Employer email address	
Companies House number	09241494

Employer	
Employer's name	South Gloucestershire Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Civic Centre High Street Kingswood South Gloucestershire BS15 2TR United Kingdom
Employer status	Active since 01 April 1996
Employer email address	

Employer	
Employer's name	South West Grid for Learning Trust
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	South West Grid for Learning Trust Belvedere House Pynes Hill EXETER EX2 5WS United Kingdom
Employer status	Active since 11 October 2005
Employer email address	
Companies House number	05589479

PSR number: 10079156

Employer	
Employer's name	Southern Brooks - South Gloucestershire Council Youth Services
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Coniston Community Association The Parade, Coniston Road Patchway BRISTOL BS34 5LP United Kingdom
Employer status	Active since 01 April 2019
Employer email address	
Companies House number	01157061

Employer	
Employer's name	St Andrews CE Primary
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bath & Wells Diocesan Board of Finance The Old Deanery WELLS Somerset BA5 2UG United Kingdom
Employer status	Active since 01 March 2018
Employer email address	
Companies House number	08207095

Employer	
Employer's name	St Annes CE VA Primary
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Priory School Queensway WESTON-SUPER-MARE Avon BS22 6BP United Kingdom
Employer status	Active since 01 April 2018
Employer email address	
Companies House number	07698707

PSR number: 10079156

Employer	
Employer's name	St Bedes School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Long Cross Lawrence Weston Bristol BS11 0SU United Kingdom
Employer status	Active since 01 November 2011
Employer email address	
Companies House number	07798550

Employer	
Employer's name	St Brendan's Sixth Form College
Employer type	Participating Employer
Organisation type	Other
Address of employer	Broomhill Road Brislington Bristol BS4 5RQ United Kingdom
Employer status	Active since 01 April 1996
Employer email address	

Employer	
Employer's name	St Georges Church School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bath & Wells MAT The Old Deanery Wells Somerset BA5 2UG United Kingdom
Employer status	Active since 01 September 2016
Employer email address	
Companies House number	08207095

PSR number: 10079156

Employer	
Employer's name	St John the Evangelist Church School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bath & Wells MAT The Old Deanery Wells Somerset BA5 2UG United Kingdom
Employer status	Active since 01 July 2016
Employer email address	
Companies House number	08207095

Employer	
Employer's name	St John's CE Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	St John's CE Primary School Redfield Road Midsomer Norton RADSTOCK BA3 2JN United Kingdom
Employer status	Active since 01 December 2013
Employer email address	
Companies House number	08741949

Employer	
Employer's name	St Johns Primary School (WMAT)
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Chandag Road Keynsham Bristol BS31 1PH United Kingdom
Employer status	Active since 01 September 2015
Employer email address	
Companies House number	07746787

PSR number: 10079156

Employer	
Employer's name	St Julians Church School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	St. Julians CE Primary School Wellow BATH BA2 8QS United Kingdom
Employer status	Active since 01 December 2018
Employer email address	
Companies House number	07365778

Employer	
Employer's name	St Katherines Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Knightstone Road Weston Super Mare North Somerset BS23 2AL United Kingdom
Employer status	Active since 01 June 2016
Employer email address	
Companies House number	08329993

Employer	
Employer's name	St Mark's Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bath & Wells MAT The Old Deanery Wells Somerset BA5 2UG United Kingdom
Employer status	Active since 01 September 2016
Employer email address	
Companies House number	08207095

PSR number: 10079156

Employer	
Employer's name	St Martin's CofE Primary School (WSM)
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	St. Martins C of E Primary School Spring Hill WESTON-SUPER-MARE Avon BS22 9BQ United Kingdom
Employer status	Active since 01 September 2017
Employer email address	
Companies House number	10885386

Employer	
Employer's name	St Martin's Garden Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Ralph Allen School Claverton Down Road Combe Down BATH BA2 7AD United Kingdom
Employer status	Active since 01 September 2016
Employer email address	
Companies House number	08061092

Employer	
Employer's name	St Mary Redcliffe Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Somerset Square Bristol BS1 6RT United Kingdom
Employer status	Active since 01 July 2017
Employer email address	
Companies House number	08156759

PSR number: 10079156

Employer	
Employer's name	St Mary's CEVA Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	St Mary's Road Portishead Bristol BS20 7QR United Kingdom
Employer status	Active since 01 September 2016
Employer email address	
Companies House number	07662102

Employer	
Employer's name	St Matthias Park School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	17 Alexandra Park Fishponds Bristol BS16 2BG United Kingdom
Employer status	Active since 01 September 2017
Employer email address	
Companies House number	10377760

Employer	
Employer's name	St Michaels CE Junior School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	St. Michael's C of E VC Junior School Newton Road BATH BA2 1RW United Kingdom
Employer status	Active since 01 April 2018
Employer email address	
Companies House number	08207095

PSR number: 10079156

Employer	
Employer's name	St Nicholas Chantry C of E VC Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	St. Nicholas Chantry Primary School Highdale Avenue CLEVEDON Avon BS21 7LT United Kingdom
Employer status	Active since 01 February 2018
Employer email address	
Companies House number	07872799

Employer	
Employer's name	St Nicholas of Tolentine Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	St. Nicholas of Tolentine RC Primary School Pennywell Road BRISTOL BS5 0TJ United Kingdom
Employer status	Active since 01 December 2012
Employer email address	
Companies House number	08278118

Employer	
Employer's name	St Patrick's catholic Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	St Patrick's Catholic Primary School Blackswarth Road BRISTOL BS5 8AS United Kingdom
Employer status	Active since 01 August 2012
Employer email address	
Companies House number	08135761

PSR number: 10079156

Employer	
Employer's name	St Peter's C of E Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	St Mary's Road Portishead Bristol BS20 7QR United Kingdom
Employer status	Active since 01 September 2016
Employer email address	
Companies House number	07662102

Employer	
Employer's name	St Philip's C of E Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Ralph Allen School Claverton Down Road Combe Down BATH BA2 7AD United Kingdom
Employer status	Active since 01 November 2016
Employer email address	
Companies House number	08061092

Employer	
Employer's name	St Saviours Infant School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bath & Wells Diocesan Board of Finance The Old Deanery WELLS Somerset BA5 2UG United Kingdom
Employer status	Active since 01 March 2018
Employer email address	
Companies House number	08207095

PSR number: 10079156

Employer	
Employer's name	St Saviours Junior School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bath & Wells Diocesan Board of Finance The Old Deanery WELLS Somerset BA5 2UG United Kingdom
Employer status	Active since 01 March 2018
Employer email address	
Companies House number	08207095

Employer	
Employer's name	St Stephens CE Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bath & Wells Diocesan Board of Finance The Old Deanery WELLS Somerset BA5 2UG United Kingdom
Employer status	Active since 01 March 2018
Employer email address	
Companies House number	08207095

Employer	
Employer's name	St Teresa Catholic Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	St. Teresas Catholic Primary School Luckington Road BRISTOL BS7 0UP United Kingdom
Employer status	Active since 01 December 2012
Employer email address	
Companies House number	08260020

PSR number: 10079156

Employer	
Employer's name	St Werburghs Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	C/O Cathedral Schools Trust College Square Bristol BS1 5TS United Kingdom
Employer status	Active since 01 August 2021
Employer email address	
Companies House number	06516626
Employer Pension Scheme Reference (EPSR)	7008

Employer	
Employer's name	Stanton Drew Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Stanton Drew Primary School Upper Stanton Stanton Drew BRISTOL BS39 4EQ United Kingdom
Employer status	Active since 01 January 2019
Employer email address	
Companies House number	07662102

Employer	
Employer's name	Steiner Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Fishponds Steiner School St. Matthias Campus Oldbury Court Road BRISTOL BS16 2JP United Kingdom
Employer status	Active since 01 September 2014
Employer email address	
Companies House number	08300393

PSR number: 10079156

Employer	
Employer's name	Stoke Bishop C of E Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Stoke Bishop C of E Primary School Cedar Park BRISTOL BS9 1BW United Kingdom
Employer status	Active since 01 February 2013
Employer email address	
Companies House number	08422944

Employer	
Employer's name	Stoke Gifford Parish Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	The Community Hall Little Stoke Lane Little Stoke Bristol BS34 6HR United Kingdom
Employer status	Active since 01 October 1989
Employer email address	

Employer	
Employer's name	Stoke Lodge and the Common Parish Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	The Pavillion The Common Stoke Lodge Bristol BS34 6BD United Kingdom
Employer status	Active since 01 April 2018
Employer email address	

PSR number: 10079156

Employer	
Employer's name	Stoke Lodge Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bradley Stoke Community School Fiddlers Wood Lane Bradley Stoke Bristol BS32 9BS United Kingdom
Employer status	Active since 01 October 2013
Employer email address	
Companies House number	08662756

Employer	
Employer's name	Stoke Park Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Stoke Park Primary Romney Avenue BRISTOL BS7 9BY United Kingdom
Employer status	Active since 01 June 2019
Employer email address	
Companies House number	06516626

Employer	
Employer's name	Summerhill Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Federation House King's Oak Academy Brook Road Kingswood Bristol BS15 4JT United Kingdom
Employer status	Active since 01 September 2012
Employer email address	
Companies House number	06561073

PSR number: 10079156

Employer	
Employer's name	Taylor Shaw Limited
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	The Courtyard Catherine Street Macclesfield Cheshire SK11 6ET United Kingdom
Employer status	Active since 01 December 2016
Employer email address	
Companies House number	06576188

Employer	
Employer's name	The Brandon Trust
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	The Brandon Trust Olympus House, Britannia Road Patchway BRISTOL BS34 5TA United Kingdom
Employer status	Active since 01 October 2017
Employer email address	
Companies House number	02365487

Employer	
Employer's name	The Bristol Music Trust
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Colston Hall Colston Street Bristol BS1 5AR United Kingdom
Employer status	Active since 01 May 2011
Employer email address	
Companies House number	07531978
Employer membership	
Number of defined benefit members	0
Effective date	16 February 2011

PSR number: 10079156

Employer	
Employer's name	The Dolphin Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Colston Girl's School Trust Cheltenham Road Bristol BS6 5RD United Kingdom
Employer status	Active since 01 January 2013
Employer email address	
Companies House number	06511936

Employer	
Employer's name	The Granary
Employer type	Participating Employer
Organisation type	Public limited company
Address of employer	1 Links Court Links Business Park St Mellons Cardiff CF3 0LT United Kingdom
Employer status	Active since 01 April 2014
Employer email address	
Companies House number	04137497

Employer	
Employer's name	The Kingfisher School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Colston Girl's School Trust Cheltenham Road Bristol BS6 5RD United Kingdom
Employer status	Active since 01 April 2013
Employer email address	
Companies House number	06511936

PSR number: 10079156

Employer	
Employer's name	The Meadows Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	The Meadows Primary School Bath Road Bitton BRISTOL BS30 6HS United Kingdom
Employer status	Active since 01 December 2017
Employer email address	
Companies House number	07746787

Employer	
Employer's name	The Park Community Trust
Employer type	Participating Employer
Organisation type	Other
Address of employer	The Park Community Centre Limited The Park Daventry Road BRISTOL BS4 1DQ United Kingdom
Employer status	Active since 01 May 2012
Employer email address	
Companies House number	07472743

Employer	
Employer's name	The Priory Community School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Primary Community School Queensway WESTON-SUPER-MARE Avon BS22 6BP United Kingdom
Employer status	Active since 17 August 2011
Employer email address	
Companies House number	07698707
Employer membership	
Number of defined benefit members	0
Effective date	08 July 2011

PSR number: 10079156

Employer	
Employer's name	The Ridings Federation Winterbourne International Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	The Ridings Federation Winterbourne International Academy High Street Winterbourne BRISTOL BS36 1JL United Kingdom
Employer status	Active since 01 September 2009
Employer email address	
Companies House number	06802948

Employer	
Employer's name	Thornbury Town Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Town Hall Old Police Station High Street Thornbury South Gloucestershire BS12 2AR United Kingdom
Employer status	Active since 01 April 1974
Employer email address	

Employer	
Employer's name	Three Ways School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Three Ways School 180 Frome Road Bath BA2 5RF United Kingdom
Employer status	Active since 01 September 2013
Employer email address	
Companies House number	08488749

PSR number: 10079156

Employer	
Employer's name	Tickenham C of E Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	c/o Clevedon School Valley Road Clevedon BS21 6AH United Kingdom
Employer status	Active since 01 January 2015
Employer email address	
Companies House number	07872799

Employer	
Employer's name	Trinity Primary School (BWMAT)
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bath & Wells MAT The Old Deanery Wells Somerset BA5 2UG United Kingdom
Employer status	Active since 01 March 2016
Employer email address	
Companies House number	05468547

Employer	
Employer's name	Trowbridge Offcleanserv Ltd
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Regency House Bonville Road Bristol BS4 5QH United Kingdom
Employer status	Active since 01 September 2019
Employer email address	
Companies House number	02531412

PSR number: 10079156

Employer	
Employer's name	Trust in Learning (Academies)
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Trust in Learning (Academies) Trust House Teyfant Road Bristol BS13 0RG United Kingdom
Employer status	Active since 01 April 2017
Employer email address	
Companies House number	08089704

Employer	
Employer's name	Trust in Learning (Outsourcings)
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Trust House Teyfant Road Bristol BS13 0RG United Kingdom
Employer status	Active since 01 April 2017
Employer email address	
Companies House number	06610908

Employer	
Employer's name	Trustees of City of Bath
Employer type	Participating Employer
Organisation type	Other
Address of employer	Mayors Office Guildhall Bath BA1 5AW United Kingdom
Employer status	Active since 01 April 1996
Employer email address	

PSR number: 10079156

Employer	
Employer's name	Twerton Infant School - Catering Tender
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Twerton Infant School Poolemead Road Bath BA2 1QR United Kingdom
Employer status	Active since 01 September 2018
Employer email address	
Companies House number	03714522

Employer	
Employer's name	Two Rivers CofE Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Wellsway School Chandag Road Keynsham Bristol BS31 1PH United Kingdom
Employer status	Active since 01 September 2020
Employer email address	
Companies House number	07746787

Employer	
Employer's name	Tyndale Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Tyndale Primary School Tyndale Avenue Yate BRISTOL BS37 5EX United Kingdom
Employer status	Active since 01 June 2019
Employer email address	
Companies House number	07633694

PSR number: 10079156

Employer	
Employer's name	Ubley CofE Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Ubley School The Street Ubley BRISTOL BS40 6PJ United Kingdom
Employer status	Active since 01 January 2019
Employer email address	
Companies House number	07622102

Employer	
Employer's name	University Of Bath
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Salaries Office Finance Department Claverton Down Bath BA2 7AY United Kingdom
Employer status	Active since 01 April 1966
Employer email address	
Companies House number	RC000644

Employer	
Employer's name	University Of The West Of England
Employer type	Participating Employer
Organisation type	Other
Address of employer	Finance Department Coldharbour Lane Frenchay Bristol BS16 1QY United Kingdom
Employer status	Active since 01 April 1992
Employer email address	
Companies House number	08027517

PSR number: 10079156

Employer	
Employer's name	Venturers' Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Merchants Academy Gatehouse Avenue BRISTOL BS13 9AJ United Kingdom
Employer status	Active since 01 September 2016
Employer email address	
Companies House number	06511936

Employer	
Employer's name	Venturers' Trust (Central Function)
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Bath Road Arnos Vale Bristol BS4 3AP United Kingdom
Employer status	Active since 01 April 2018
Employer email address	
Companies House number	06511936

Employer	
Employer's name	Victoria Park Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	ABBOTSGATE HOUSE HOLLOW ROAD BURY ST EDMUNDS SUFFOLK IP32 7FA United Kingdom
Employer status	Active since 01 August 2017
Employer email address	
Companies House number	06516626

PSR number: 10079156

Employer	
Employer's name	Virgin Care Provider Services Limited
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Lynton House 7-12 Tavistock Square London WC1H 9LT United Kingdom
Employer status	Active since 01 April 2017
Employer email address	
Companies House number	07645492

Employer	
Employer's name	Virgin Care Services Limited
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Virgin Care Lynton House 7-12 Tavistock Square LONDON WC1H 9LT United Kingdom
Employer status	Active since 01 April 2017
Employer email address	
Companies House number	07557877

Employer	
Employer's name	Vision North Somerset
Employer type	Participating Employer
Organisation type	Registered charity
Address of employer	3 Neva Road Weston Super Mare North Somerset BS23 1YD United Kingdom
Employer status	Active since 01 April 1996
Employer email address	
Charities number	1165364

PSR number: 10079156

Employer	
Employer's name	Walliscote Primary Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Selworthy Road Weston Super Mare North Somerset BS23 3ST United Kingdom
Employer status	Active since 01 October 2017
Employer email address	
Companies House number	10896504

Employer	
Employer's name	Wallscourt Farm Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Federation House King's Oak Academy Brook Road Kingswood Bristol BS15 4JT United Kingdom
Employer status	Active since 01 September 2013
Employer email address	
Companies House number	06207590

Employer	
Employer's name	Wansdyke Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Chandag Road Keynsham Bristol BS31 1PH United Kingdom
Employer status	Active since 01 November 2018
Employer email address	
Companies House number	07746787

PSR number: 10079156

Employer	
Employer's name	Waycroft Junior School Academy
Employer type	Participating Employer
Organisation type	Other
Address of employer	Seldon Road Stockwood Bristol BS14 8PS United Kingdom
Employer status	Active since 01 August 2011
Employer email address	
Companies House number	07683980
Employer membership	
Number of defined benefit members	0
Effective date	01 August 2011

Employer	
Employer's name	Wellsway MAT Trading Ltd
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	Wellsway School Chandag Road Keynsham Bristol BS31 1PH United Kingdom
Employer status	Active since 15 February 2020
Employer email address	
Companies House number	09710816

Employer	
Employer's name	Wellsway School Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Wellsway School Academy Chandag Road Keynsham BRISTOL BS31 1PH United Kingdom
Employer status	Active since 01 October 2011
Employer email address	
Companies House number	07746787

PSR number: 10079156

Employer	
Employer's name	Welton Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Welton Primary School Radstock Road Midsomer Norton RADSTOCK BA3 2AG United Kingdom
Employer status	Active since 01 July 2016
Employer email address	
Companies House number	07365778

Employer	
Employer's name	West Leigh Infant School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	West Leigh County Infant School Westfield Drive Backwell BRISTOL BS48 3NG United Kingdom
Employer status	Active since 01 February 2018
Employer email address	
Companies House number	07662102

Employer	
Employer's name	West of England Combined Authority
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	The Engine Shed Approach Road Temple Meads BRISTOL BS1 6QH United Kingdom
Employer status	Active since 01 May 2017
Employer email address	

PSR number: 10079156

Employer	
Employer's name	West Town Lane Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	West Town Lane Brislington Bristol BS4 5DT United Kingdom
Employer status	Active since 01 January 2012
Employer email address	
Companies House number	07848632

Employer	
Employer's name	Westbury on Trym C of E Academy
Employer type	Participating Employer
Organisation type	Other
Address of employer	Channells Hill Westbury-on-Trym C of E Primary School BS9 3HZ United Kingdom
Employer status	Active since 01 August 2011
Employer email address	
Companies House number	07669263
Employer membership	
Number of defined benefit members	0
Effective date	01 September 2011

Employer	
Employer's name	Westbury Park Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Westbury Park School 13 Bayswater Avenue BRISTOL BS6 7NU United Kingdom
Employer status	Active since 01 August 2012
Employer email address	
Companies House number	08130158

PSR number: 10079156

Employer	
Employer's name	Westerleigh Parish Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	39 Longs View Charfield South Gloucestershire GL12 8HZ United Kingdom
Employer status	Active since 05 March 2007
Employer email address	

Employer	
Employer's name	Westfield Parish Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	The Oval Office Cobblers Way Westfield Radstock Bath BA3 3BX United Kingdom
Employer status	Active since 01 April 2011
Employer email address	

Employer membership	
Number of defined benefit members	0
Effective date	01 April 2011

Employer	
Employer's name	Westfield Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Westfield Primary School Longfellow Road RADSTOCK BA3 3XX United Kingdom
Employer status	Active since 01 October 2018
Employer email address	
Companies House number	07365778

Employer	
Employer's name	Weston All Saints Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Weston All Saints C of E Primary School Broadmoor Lane BATH BA1 4JR United Kingdom
Employer status	Active since 01 April 2016
Employer email address	
Companies House number	10049139

Employer	
Employer's name	Weston College
Employer type	Participating Employer
Organisation type	Other
Address of employer	Knightstone Road Weston Super Mare BS23 2AL United Kingdom
Employer status	Active since 01 April 1996
Employer email address	

Employer	
Employer's name	Weston Super Mare Town Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Grove House Grove Park Weston Super Mare BS23 2QJ United Kingdom
Employer status	Active since 01 April 2000
Employer email address	

Employer	
Employer's name	Weston Support Services
Employer type	Participating Employer
Organisation type	Private limited company
Address of employer	7 Kiln Park Searle Crescent WESTON-SUPER-MARE North Somerset BS23 3XP United Kingdom
Employer status	Active since 08 April 2017
Employer email address	
Companies House number	10016920

PSR number: 10079156

Employer	
Employer's name	Whitchurch Parish Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Community Centre Bristol Road Whitchurch Bristol BS14 0PT United Kingdom
Employer status	Active since 01 April 1997
Employer email address	

Employer	
Employer's name	Whitchurch Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Whitchurch Primary School 22 Bristol Road Whitchurch BRISTOL BS14 0PT United Kingdom
Employer status	Active since 01 April 2020
Employer email address	
Companies House number	07662102

Employer	
Employer's name	Wicklea Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Seldon Road Stockwood Bristol BS14 8PS United Kingdom
Employer status	Active since 01 March 2015
Employer email address	
Companies House number	07683980

PSR number: 10079156

Employer	
Employer's name	Widcombe C of E Infant School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Ralph Allen School Claverton Down Road Combe Down BATH BA2 7AD United Kingdom
Employer status	Active since 01 August 2016
Employer email address	
Companies House number	08061092

Employer	
Employer's name	Widcombe C of E Junior School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Ralph Allen School Claverton Down Road Combe Down BATH BA2 7AD United Kingdom
Employer status	Active since 01 November 2016
Employer email address	
Companies House number	08061092

Employer	
Employer's name	Windwhistle Primary Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Selworthy Road Weston Super Mare North Somerset BS23 3ST United Kingdom
Employer status	Active since 01 October 2017
Employer email address	
Companies House number	10896504

PSR number: 10079156

Employer	
Employer's name	Winford CofE Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Winford Primary School Felton Lane Winford BRISTOL BS40 8AD United Kingdom
Employer status	Active since 01 January 2019
Employer email address	
Companies House number	07662101

Employer	
Employer's name	Winterbourne Parish Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	The Greenfield Centre Park Avenue Winterbourne BRISTOL BS36 1NJ United Kingdom
Employer status	Active since 16 May 2016
Employer email address	

Employer	
Employer's name	Winterstoke Hundrd Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Weston College Knightstone Road Weston-Super-Mare Avon BS23 2AL United Kingdom
Employer status	Active since 01 September 2014
Employer email address	
Companies House number	08329993

PSR number: 10079156

Employer	
Employer's name	Woodlands Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Seldon Road Stockwood Bristol BS14 8PS United Kingdom
Employer status	Active since 01 October 2015
Employer email address	
Companies House number	07683980

Employer	
Employer's name	Woodlands Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Sundridge Park Yate BRISTOL BS37 4HB United Kingdom
Employer status	Active since 01 September 2019
Employer email address	
Companies House number	07633694

Employer	
Employer's name	Worle Community School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Queensway Weston Super Mare North Somerset BS22 6BP United Kingdom
Employer status	Active since 01 March 2017
Employer email address	
Companies House number	07698707

PSR number: 10079156

Employer	
Employer's name	Worle Village School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Worle Village Primary School Church Road Worle WESTON-SUPER-MARE Avon BS22 9EJ United Kingdom
Employer status	Active since 01 September 2017
Employer email address	
Companies House number	10885386

Employer	
Employer's name	Wraxall C of E VA Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Wraxall Church School Bristol Road Wraxall BRISTOL BS48 1LB United Kingdom
Employer status	Active since 01 July 2018
Employer email address	
Companies House number	07662102

Employer	
Employer's name	Writhlington Academy Trust
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Writhlington School Academy Knobsbury Lane Writhlington RADSTOCK BA3 3NQ United Kingdom
Employer status	Active since 01 October 2011
Employer email address	
Companies House number	07728482

PSR number: 10079156

Employer	
Employer's name	Writhlington Sports Trust
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Writhlington School Academy Knobsbury Lane Writhlington RADSTOCK BA3 3NQ United Kingdom
Employer status	Active since 01 July 2015
Employer email address	
Companies House number	07728482

Employer	
Employer's name	Yate Academy
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	The Ridings Federation Yate International Academy Sundridge Park Yate BRISTOL BS37 4DX United Kingdom
Employer status	Active since 01 September 2009
Employer email address	
Companies House number	07633694

Employer	
Employer's name	Yate Town Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Poole Court Poole Court Drive Yate Bristol BS17 5PP United Kingdom
Employer status	Active since 01 September 1974
Employer email address	

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Employer	
Employer's name	Yatton CE Junior School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Yatton Junior School High Street Yatton BRISTOL BS49 4HJ United Kingdom
Employer status	Active since 01 April 2018
Employer email address	
Companies House number	07662102

Employer	
Employer's name	Yatton Parish Council
Employer type	Participating Employer
Organisation type	Government / public body
Address of employer	Yatton Library High Street Yatton Bristol BS49 4HJ United Kingdom
Employer status	Active since 11 January 2010
Employer email address	

Employer	
Employer's name	Yatton VC Infant School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Yatton Infant School High Street Yatton BRISTOL BS49 4HJ United Kingdom
Employer status	Active since 01 April 2018
Employer email address	
Companies House number	07662102

PSR number: 10079156

Employer	
Employer's name	Yeo Moor Primary School
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	c/o Clevedon School Valley Road Clevedon BS21 6AH United Kingdom
Employer status	Active since 01 January 2015
Employer email address	
Companies House number	07872799

Employer	
Employer's name	Youth Connect South West
Employer type	Participating Employer
Organisation type	College or education institution
Address of employer	Southside Youth Centre Kelston View BATH BA2 1NR United Kingdom
Employer status	Active since 04 November 2019
Employer email address	
Companies House number	11953689

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6. Service provider details

Insurer	
Name of insurer	Aon Hewitt
Address of insurer	A O N Ltd The Leadenhall Building 122 Leadenhall Street LONDON EC3V 4AN United Kingdom
Insurer reference	P19CASLFG00003
Insurer provides main administrator services?	No
Telephone number	0207 0863366
Email address	

In-house administrator	
Main contact title	Mr
Main contact first name(s)	Geoff
Main contact surname	Cleak
Address of in-house administrator	Bath & North East Somerset Council Lewis House Manvers Street BATH BA1 1JG United Kingdom
Direct telephone number	01225395277
Individual's email address	geoff_cleak@bathnes.gov.uk

Third-party administrator	
There is currently no third-party administrator listed as involved with this scheme. Details required are organisation name and address, telephone number and email address.	

Auditor	
Organisation name	Grant Thornton UK LLP
Address of auditor	Grant Thornton UK LLP Grant Thornton House 22 Melton Street LONDON NW1 2EP United Kingdom
Telephone number	+44 (0)7766 442 038
Email address	richard.lawson@uk.gt.com

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7. Contact details

Scheme contact details	
Name of contact	Mr Geoff Cleak
Job title	Pensions Manager
Address of contact	Bath & North East Somerset Council Lewis House Manvers Street BATH BA1 1JG United Kingdom
Telephone number	01225 395277
Email address	geoff_cleak@bathnes.gov.uk

Pension tracing service contact details	
Name of contact	Mr Geoffrey Cleak
Address of contact	Civic Centre Market Walk Keynsham Bristol BS31 1FS United Kingdom
Telephone number	01225 395277
Email address	geoff_cleak@bathnes.gov.uk

Consent to electronic service details	
Confirmed by contact name	Mr Geoffrey Cleak
Confirmed date	06/10/2021
Email address	geoff_cleak@bathnes.gov.uk

PSR number: 10079156

Bath & North East Somerset Council		
MEETING:	LOCAL PENSION BOARD - AVON PENSION FUND	
MEETING DATE:	30 November 2021	AGENDA ITEM NUMBER
TITLE:	Risk Management Update – Risk Register	
WARD:	ALL	
AN OPEN PUBLIC ITEM		
List of attachments to this report:		
Appendix 1	Avon Pension Fund Risk Register	
Appendix 2	Dashboard	

1. THE ISSUE

- 1.1. The purpose of this report is to update the Pension Board with the latest risk register as at November 2021.

2. RECOMMENDATION

- 2.1. That the Board notes the report.

3. FINANCIAL IMPLICATIONS

- 3.1. There are no direct implications related to the Pension Board in connection with this report.

4. REPORT – RISK MANAGEMENT PROCESS & RISK REGISTER

- 4.1. The risk register identifies the significant risks that could have a material impact on the Fund in terms of value, reputation, compliance or provision of service and sets out the action taken to manage the risk.
- 4.2. The Risk Register is reviewed every quarter by the pension management team. All risks with a review date are re-evaluated using the evaluation form and updates agreed and made to the risk register. Any new risks identified or changes to any other risks are also considered and the necessary amendments made.
- 4.3. The risk register including likelihood, impact and mitigating actions is included in Appendix 1 and overview dashboard is attached as Appendix 2.
- 4.4. The risks identified fall into the following general categories:
- (i) Fund administration & control of operational processes and strategic governance processes and TPR compliance – mitigated by having appropriate policies and procedures in place, use of electronic means to receive and send data and information
 - (ii) Service delivery partners not delivering in line with their contracts or SLAs – mitigated by monitoring and measuring performance

- (iii) Financial loss due to payments in error, loss of assets due to investment strategy and/or managers failing to deliver required return, fraud or negligence of investment managers or custodian – mitigated by processes to reconcile payments, regular review of strategic return and manager performance and annual review of investment strategy, robust legal contracts to protect against fraud & negligence
- (iv) Changes to the scheme – mitigated by project plans with defined milestones and responsibilities, progress reviewed periodically by management team
- (v) Increasing political pressure to reform scheme structure and governance frameworks and direct investment decisions – mitigated by having well defined investment policies and by engaging with the government through the consultation process

5. QUARTERLY REVIEW OF RISK MANAGEMENT & REGISTER

5.1. Following the quarterly review of the risk register the following changes were made:

(i) R66 - Pensions Dashboard

A new risk was added to the register to represent the risk to the Fund of not being ready for the implementation of the Pensions Dashboard. The Fund will be in breach of the regulations if it is not able to go live by the compulsion date, likely to be between Sept 2023 & March 2024. The risk of not being ready is currently a relatively low risk as preparations have started. A Project lead officer has been appointed & a project plan is in place. The focus of the project will be data quality, reducing backlogs and ensuring resources & processes are in place to deal with the expected increase in member queries following the implementation date. A data protection impact assessment will also be carried out.

(ii) R63 – McCloud/Sargeant Judgements

The impact of the McCloud risk has been increased to (5) almost critical, to represent the significant additional workload to the administration team caused by the fire immediate detriment decision.

(iii) R28 – Recruitment of Staff

Although phase 3 of the recruitment project is complete, the risk has been retained at its current high level due to the continuing difficulties of recruiting staff. The Technical & Compliance Advisor role has not been filled, two other resignations have been received and there are still a few posts to backfill due to internal promotions.

(iv) R08 – Internal Controls

There was no change to the risk score but following the completion of the last year's internal audit work, reports on IConnect, Scheme of delegation, Altair IT System, Risk Management & COP14, all received an assurance level of 4 'Good'. A full report was reported to the Pension Board in September 2021 and will be reported to the Pensions Committee in December 2021.

6. EQUALITIES

6.1. A proportionate equalities impact assessment has been carried out using corporate guidelines and no significant issues have been identified.

7. CLIMATE CHANGE

7.1. The Fund is implementing a digital strategy across all its operations and communications with stakeholders to reduce its internal carbon footprint in line with the Council's Climate Strategy. The Fund acknowledges the financial risk to its assets from climate change and is addressing this through its strategic asset allocation to Paris Aligned Global Equities, Sustainable Equities and renewable energy opportunities. The strategy is monitored and reviewed by the Committee.

8. CONSULTATION

- 1.1 Reports and its contents have been discussed with the Head of Business Finance & Pensions representing the Avon Pension Fund and Service Director – One West representing the administering authority.

Contact person	Carolyn Morgan - Governance & Risk Advisor – 01225 395240
Background papers	
Please contact the report author if you need to access this report in an alternative format	

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Risk	Risk Number	Impact	RAG	Trend	Mitigating Action
The Fund has not completed all the necessary work in readiness for the implementation of the Pensions Dashboard	R66	The Fund will be in breach of the regulations if it is not able to go live by the compulsion date, likely to be between Sept 2023 & March 2024		New	Project lead officer appointed & project plan in place. Focus of project will be data quality, reducing backlogs and ensuring resources & processes are in place to deal with the expected increase in member queries following the implementation date. Data protection impact assessment to be carried out.
Recruitment of staff	R28	Fund's ability to develop & implement service plan and administer the Fund		◀▶	Phase 3 of recruitment plan is now complete. However internal promotions have created further backfill requirements, there have been two further resignations & the Technical & Compliance Advisor post remains unfilled. Mercer are providing technical support as required.
McCloud/Sargeant Judgements resulting in the extension of protections	R63	Increase in workload on administration side and for scheme employers		▲	On 13 May 2021, a Written Ministerial Statement outlining some key remedy policies was issued. A formal response to the consultation will be published later this year, and the new LGPS regulations giving effect to the changes are expected to come into force on 1 April 2023, and be retrospective to 1 April 2014. Home Office decision to enable FPS members to have early release of benefits under McCloud. LGA & FBU adopt a MOU and Immediate Detriment Framework agreement for relevant Fire Pension Scheme Members subject to approval by Avon Fire Authority. Additional admin resource and reprioritisation of workload required to ensure IDF can be delivered.
Deterioration in financial stability of employers (employer Covenants)	R23	employers not able to meet their liabilities impact on rest of Fund		◀▶	Have ongoing Covenant Review of employer identified as high risk. No immediate concerns about employers not being able to meet their liabilities. No contribution queries at present. The covenant cycle for 2021 is presently being finalised with no new issues. Only UoB is in USS and having made enquires we do not believe debt arrangements affect them. Deferred Debt Arrangement policy is in place and a DDA is being developed by us for use.
Failure to earn investment returns	R26	scheme cannot meet liabilities, employer conts could rise		◀▶	<ul style="list-style-type: none"> Q321 - No material underperforming managers Agreement by Panel/Cmt in Sept to exit EM allocation due to the financial risk posed by climate change in the region. Advice commissioned to ensure expected investment returns not impacted by decision. Sept FRMG discussed indicative changes to inv. strategy that would see risk/return increase to help support current valuation assumptions: agreed to adopt 2.7% reduction in contributions, aligned to a 25bps decrease in the discount rate and to maintain current inv. strategy and review as part of broader IS review next year.
Increase in employers	R56	increased resources needed to support more employers		◀▶	Additional resources have been put into Employer Services to support & train employers. A review of resources & processes will be picked up with Digital Transformation review.
Political Pressure to reform the scheme & direct investment decisions eg ESG	R42	National decisions are not in best interests of the scheme		◀▶	Participate in Brunel pool, ISS aligned with Fund's Climate Change policy. Supreme court judgement against SoS re ESG guidance clarifies that government only has power over how funds invests, not what they invest in. Have good local governance but national decisions could impact. Ensure advisors engage on national LGPS issues.
Climate Change Emergency	R60	Significant financial risk to the value of the investments assets		◀▶	SAA revised to a higher allocation to climate positive investments. Unable to control global markets in general only through strategy.
Failure to secure and manage personal data held by the Fund in line with Data Protection Regulations	R05	Personal data is corrupted, compromised or illegally shared resulting in fines & reputational damage.		◀▶	Cyber security benchmarking exercise completed with AON and results analysed August 2021. An action plan is currently being developed and a full report will be taken to Pension Board in Feb 2022 & Committee in March 2022. More training for staff & better process notes being developed to identify SARs and data breaches as a couple have not been picked up on receipt.
Sustainability of working arrangements during Covid 19 outbreak	R64	Unable to deliver service to members and employers		◀▶	Steps taken to mitigate the risk of Coronavirus impacting on the service as set out in our business continuity plan. Work has now started on re-design of Keynsham Civic Centre but not likely that staff will be regularly in the office until April 22. Roll out of new IT equipment for all staff is still in progress. Review of future working arrangements, admin strategy and digital transformation plans in place.

Implementation of changes arising from scheme cost cap mechanism	R47	Additional burden on administration. Awareness of members & employers		◀▶	On 16 July 2020 the Government made an announcement confirming that the cost control mechanism pause will be lifted for public sector schemes and the objective would be to complete the process by next year, taking into account the cost of the proposals to remedy age discrimination. The SAB further agreed that the LGPS cost cap arrangement should be un-paused in the same way as the HMT arrangement, but no action should be taken until the HMT Direction, on how McCloud costs are to be considered, is published early next year along with the final remedy details.
Iconnect data from employers	R59	Incorrect member data on records and valuation of employer liabilities		◀▶	Iconnect Team has been set up and extracts are now loaded inhouse. New tolerances in IC will stop a load proceeding without the fund's approval enabling loading to be handed back to some employers. Plans being developed to hand back loading to Employers.
Inadequate knowledge of those charged with governance. Committee Members knowledge is impacted by re-election process. Failure to comply with statutory regulations	R25	delays in decision making for the Committee & Fund. Failure to meet MIFID & TPR regs		◀▶	Hymans NKA reviewed and training planned throughout the year for committee & PB members inline with the recommendations. Plan to recruit in 2022 for ind member. Recruitment for 2 new for PB members has just been completed. Further requirements expected from Good Governance Review. Fund to launch Hymans Online Learning Academy to all Committee & PB members plus some officers.
Brunel fails to deliver its objectives to clients in terms of service delivery	R65	Affects the Fund's ability to achieve its own investment objectives and/or implementing its strategy		◀▶	Client assurance framework is in place providing detailed monitoring by Client Group and Brunel Oversight Board. Avon Panel monitors investment performance and related investment issues; Committee monitors overall service delivery, financial aspects, RI aspects and effectiveness of the governance framework. Avon has Brunel Working Group to discuss any issues or emerging risks and to agree response to SRM/RMs
Late / incorrect contributions from employers	R10	cashflow, employer funding position, TPR breach		◀▶	Monthly reconciliations of contributions continue to be undertaken. Late payers are also monitored and reported to committee/Pension Fund Manager. There is no significant increase in late payers. The top 34 employers are still paying on time.
Service delivery efficiency & customer service	R29	poor member outcomes		◀▶	We have recently introduced mass email communication to the fund for the first time, which was used in May/June 2021 to communicate with our Deferred members regarding the introduction of Annual benefit statements being available to download from our online portal. This will be extended to Active members next year alongside a campaign to extend email communications to a greater portion of the membership. Impact on service of Fire immediate detriment work will be monitored.
Government plans to reform the LGPS eg The introduction of the exit payment cap	R53	This will place an additional burden on the administration resource		◀▶	MHCLG have confirmed that no action will be taken following the consultation they held on the Further Reforms to Exit Payments proposed for the LGPS, instead further consultation is expected in the future. In April 2021, MHCLG wrote to councils requesting for them to provide data on exit payments, which will be used to inform delivery of the Government's policy to end excessively high exit payments in the public sector.
Disaster Recovery & Business Continuity	R01	Fund is unable to operate and members do not receive pension payments in time		▲	Business continuity plan currently being reviewed by Audit. Cyber security benchmarking exercise completed with AON and results analysed August 2021. Further internal assurances required from IT. An action plan is currently being developed and a full report will be taken to Pension Board in Feb 2022 & Committee in March 2022.
Loss of capital or income on treasury investments	R39	Delayed return of principle or investment income		◀▶	Annual report to Committee to obtain approval for the fund's Treasury Management Policy. POST COVID : Cash held primarily in money market funds and although should not fall in value they could face liquidity issues if sudden increase in withdrawals if market volatility increases. On 4th June Arlingclose updated their information on recommended banks to hold deposits with after conducting some stress testing analysis and they have taken a bank off the list of banks that the pension fund can use.
failure of employers to meet statutory responsibilities	R19	Potential fines, greater scrutiny and more reporting		◀▶	Employer training, reconciliation of member data at year end and regular reporting in line with TRP requirements

Introduction of Cost Transparency Disclosures	R57	full disclosure requirements may not be met (presentation of data in AR on a best endeavours basis)		◀▶	Full disclosure for FY2020/21. All managers reporting in line with CTI templates although not all managers reporting in a consistent manner. Different templates for private and public assets make data consolidation difficult and manually keying data increases risk of human error. Templates do not reflect all pricing conventions e.g. where fees are charged to NAV on a daily basis as opposed to being charged based on an average value over a predefined period. Some managers reported based on legacy CTI templates, others submitted their templates in PDF so had to manually convert data and pooled fund managers continue to report based on fund level (not individual client level). Some managers had to be prompted to submit the data and the use of the SAB platform is sporadic. Differences between CTI disclosures and fees reported as part of Statement of Accounts largely due to timing (where we estimate some fees in SoA to meet statutory deadlines).
Governance risk of Investment Managers, custodian & other investment suppliers	R20	loss of assets or inability to trade due to assets being inaccessible		◀▶	Robust procurement & contract management processes to protect Fund. However much of the risk has transferred to Brunel, monitored by Client Group and Brunel Oversight Board. Fund retains full oversight of legacy managers and advisors.
Internal Controls are not adequate & independently checked	R08/R09	committee & employers do not receive independent assurances		◀▶	Internal Audit reported to Pension Board in September 21 regarding audits performed in last year. Audits completed on IConnect, Scheme of delegation, Altair IT System, Risk Management & COP14. Each received an assurance level of 4 'Good' External audit of final accounts and annual report currently taking place. Audits currently taken place or planned for Pensions Payroll, Business Continuity, Digital Strategy Review.
System Failure of BACs or Cseries	R14	pensions cannot be administered & paid		◀▶	APF uses BANES corporate system. Risk mitigation in line with BANES corporate policy for making payments. Payments system (Cseries) recently upgraded
Cashflow profile is maturing	R40	not enough cash in bank account to meet pension payments		◀▶	Lower level of cash coming in each month due to unitary employers paying in advance means that we have to top up our cash more regularly. Our lower limit used to be 10m and upper £35/45m depending on access to money market funds. A combination of these factors mean the we have to monitor our cash position regularly to ensure these limits aren't breached.
Ineffective stakeholder communication	R07	poor public relations with members & employers. TPR breach		◀▶	Recently introduced mass email communication to the fund for the first time, which was used in May/June 2021 to communicate with Deferred members regarding the introduction of Annual benefit statements being available to download from online portal. This will be extended to Active members next year alongside a campaign to extend email communications to a greater portion of the membership. Also plan to introduce social media (LinkedIn)
Failure to comply with Council's policies & codes of practice	R41	finances for non-compliance, disciplinary issues & reputational risk		◀▶	Managers & staff undertake training in accordance with Council's codes of practices and standards
GMP Reconciliation	R51	Incorrect pension liability retained		◀▶	Project plan in place to reconcile GMPs with HMRC info and carry out necessary rectification. Slight delay due to Covid 19.
Investment Strategy impact by MIFID II	R52	restrictions on investments as retail investor		◀▶	Fund given Elected Professional status from all Managers, annual review & Officer / Member training in place
Exit credits - disputes between exiting employer & outsourcing employer	R62	Court cases to decide who should receive exit credit		◀▶	There is an ongoing risk of a challenge to an exit credit determination, this would only be a risk if it was a large exit credit. At the moment there are no large exit credits in sight and we have a clear policy. However with more employers in surplus, the risk increases.

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Governance Risks						Impact		Investment & Funding Risks							
Total 5	0	0	0	0	0	Negligible Low Medium High Critical		0	0	0	0	0	Total 10		
	1	0	0	0	0			0	0	2	0	2			
	1	1	0	1	0			0	0	0	0	0			
	0	0	0	0	0			0	3	0	0	1			
	0	0	0	0	1			0	0	1	1	0			
Likelihood	Rare	Unlikely	Possible	Likely	Almost Certain			Almost Certain	Likely	Possible	Unlikely	Rare	Likelihood		
	0	0	0	0	1	Critical High Medium Low Negligible		0	0	0	0	0		Total 2	
	0	0	4	1	0			0	0	0	0	0			
	2	0	2	0	0			0	0	1	0	1			
	0	0	1	1	0			0	0	0	0	0			
	0	1	0	0	0			0	0	0	0	0			
Administration Risks						Impact		Financial Risks							

The above tables show the number of risks, broken down by type, and their current risk exposure

Key:- Based on Risk Score

	1-6
	7-14
	15-25

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Bath & North East Somerset Council		
MEETING:	LOCAL PENSION BOARD - AVON PENSION FUND	
MEETING DATE:	30 November 2021	AGENDA ITEM NUMBER
TITLE:	Pension Board – Training and Work Plan Update	
WARD:	ALL	
AN OPEN PUBLIC ITEM		
List of attachments to this report:		
Appendix 1 – Pension Board Workplan 2021/22		
Appendix 2 – Pension Board Training Plan 2021/22		

1 THE ISSUE

- 1.1 The purpose of this report is to receive regular updates on Training and Work Plan issues from the Board and request high level training needs from Board Members.
- 1.2 Contained in this report is notice of some upcoming changes to how future meeting reports will be accessed via Modern Gov.
- 1.3 The Fund has signed up to the Hymans Robertson's LGPS Online Learning Academy (LOLA) and propose to ask committee members to undertake training modules from January 2022.

2 RECOMMENDATION

That the Board

- 2.1 Notes the workplan & training plan for 2021/22
- 2.2 Notes the changes to accessing future meeting reports
- 2.3 Agrees the proposal to complete modules from the Online Training Academy

3 FINANCIAL IMPLICATIONS

- 3.1 There are direct implications related to the Pension Board in connection with this report, however these are all currently within the planned budget for the operation of the Board.

4 REPORT

4.1 Training

- a) In developing a training plan Board Members should reflect on their own statutory requirements as set out in previous reports. In summary Board Members should have a breadth of knowledge and understanding that is sufficient to allow them to understand fully any professional advice the Board is given. They should also be able to challenge any information or advice they are given and understand how that information or advice impacts on any decision relating to the Board's duty to assist the Avon Pension Fund.
- b) As agreed at previous Board meetings individual board members should retain their own training log to evidence how they are fulfilling their responsibilities and update these on a quarterly basis to the Governance & Risk Advisor to aid future training needs analysis.
- c) Appendix 2 contains the current training for the year to date. Following participation in the National Knowledge Assessment conducted by Hyman Robertson LLP a training plan has been put together based on the recommendations of the assessment, which covers the requirements of the CIPFA Knowledge & Skills Framework. The workshops will be held jointly with the APF Pension Committee.
- d) Members are asked to consider any other training needs through the rest of 2021/22 to fit into the working cycle of the Board.

4.2 Work Plan

- a) In developing a work plan the Board should reflect the need to maintain a balance between building the knowledge and understanding of Board Members along with delivery of the statutory obligations of the Board.
- b) The views of the Board are vital in informing the nature, frequency and cyclical nature of items as well as the timing of certain time-critical issues for consideration such as Project Brunel.
- c) An outline of the Work Plan is attached at Appendix 1 for consideration and will continue to be worked on and re-presented at each meeting as the year progresses using the comments and feedback of the Board, Officers and other stakeholders such as the Pension Fund Committee to inform its contents.

4.3 Modern Gov & Library

- a) The proposal is to ask all Pension Board members to access meeting papers via Modern Gov from January 2022 onwards.
- b) In order to ensure all members have the correct access to Modern Gov and the library, The APF Communications Team, led by Jason Morel, will contact all members in January 2022 to provide the relevant support & training required.
- c) It is intended that some of the more routine monitoring reports will be available on the Modern Gov library and will not form part of the meeting reports pack. This is currently being discussed with the Pension Committee and more details will follow once approved.

4.4 Hyman's LGPS Online Learning Academy (LOLA)

- a) The SAB's Good Governance Review is expected to include additional knowledge and skills requirements for Committee, Pension Board and Officers. Hymans Robertson have been working with the SAB to develop these requirements and have produced an LGPS Online Learning Academy (LOLA).
- b) The training is split into a number of modules covering the revamped CIPFA Knowledge & Skills Framework and TPR's Code of Practice 14. (The training will be updated to reflect the Single Code of Practice once published) Each module contains up to 6 short presentations of 20 minutes or less.
- c) The training has been designed so that it can be done in bite sized chunks, including supplementary information, such as definitions of common jargon, links to additional learning material and a short quiz at the end of each module.
- d) Included in the modules are sessions on:
 - (i) Introduction to the LGPS
 - (ii) LGPS Governance & Regulators
 - (iii) Administration & Fund Management
 - (iv) Funding & Actuarial Matters
 - (v) Investments
 - (vi) Current Issues – McCloud, Goodwin and Cost Sharing
- e) The Fund has arranged for Hymans to do a short demonstration of LOLA on 17th December 2021 at 2pm. The session should take approximately 30 minutes. Invites have already been sent to members. The session will be recorded and distributed for those that cannot attend.
- f) Following the demonstration the proposal is that all Pension Board members are provided with login details and will be asked to complete the training modules.
- g) A quarterly newsletter will be issued to inform members of the training modules to be completed over the following quarter to support the next meeting agenda.

5 RISK MANAGEMENT

5.1 The Avon Pension Fund Committee is the formal decision-making body for the Fund. As such it has responsibility to ensure adequate risk management processes are in place. It discharges this responsibility by ensuring the Fund has an appropriate investment strategy and investment management structure in place that is regularly monitored. In addition, it monitors the benefits administration, the risk register and compliance with relevant investment, finance and administration regulations.

6 EQUALITIES

6.1 A proportionate equalities impact assessment has been carried out using corporate guidelines and no significant issues have been identified.

7 CLIMATE CHANGE

7.1 The Fund is implementing a digital strategy across all its operations and communications with stakeholders to reduce its internal carbon footprint in line with the Council's Climate Strategy. The Fund acknowledges the financial risk to its assets from climate change and is addressing this through its strategic asset allocation to Paris Aligned Global Equities, Sustainable Equities and renewable energy opportunities. The strategy is monitored and reviewed by the Committee.

8 CONSULTATION

8.1 Reports and its contents have been discussed with the Head of Business Finance & Pensions representing the Avon Pension Fund and Service Director – One West representing the administering authority.

Contact person	Carolyn Morgan – Governance & Risk Advisor – 01225 395240
Please contact the report author if you need to access this report in an alternative format	

Appendix 1

Pension Board Workplan	21/09/21	30/11/21	22/02/22	TBA - 05/2022
Quarterly Updates				
Administration Update (KPIs)				
Regulatory Update				
Brunel Update				
Risk Register review				
Workplan & training plan				
Annual Updates				
Breaches Log - review of regulatory & data Breaches				
Statutory annual requirements (year end/ABS/PSS)				
Annual review of committee & PB governance arrangements				
Pension Fund annual report & statement of accounts				
Pension Board's annual report				
Review of Audit reports				
CIPFA Benchmarking				
Update on service plan				
Administration Strategy				
Funding Strategy				
Investment Strategy				

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Appendix 2
Pension Board Training Plan

Training Plan	Type of Training	Date planned / delivered
Trustee Fundamentals	Seminar	Autumn 2021
Brunel Investor Days	Online Seminar	27 Sept & 6 Oct 2021
Governance Conference	Conference	20 & 21 January 2022
Hymans LGPS Online Learning Academy	Workshop	Dec-21
Actuarial & Valuation Session	Workshop	Dec-21
Good Governance Review Workshop	Workshop	Feb-22
Pension Administration & Governance	Workshop	May-22
Investment performance & risk management	Workshop	TBA

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