

Annex A – Publishing scheme information

What information to publish:	APF compliance	Commentary/notes
<ul style="list-style-type: none"> who the pension board members are 	100%	Available via member website: www.avonpensionfund.org.uk/pension-board Available via employer website: www.apfemployers.org.uk
<ul style="list-style-type: none"> representation on the pension board 	100%	As above
<ul style="list-style-type: none"> matters for which the pension board is responsible 	100%	As above
<ul style="list-style-type: none"> the pension board's terms of reference 	100%	As above
<ul style="list-style-type: none"> the pension board appointment process 	100%	As above
<ul style="list-style-type: none"> who each pension board member represents 	100%	As above
<ul style="list-style-type: none"> employment and job title (where relevant) and any other relevant position held by each board member 	100%	As above
<ul style="list-style-type: none"> any specific roles and responsibilities of individual pension board members 	Not applicable	
<ul style="list-style-type: none"> information such as pension board papers, agendas and meeting minutes (with confidential information removed) 	100%	As above
<ul style="list-style-type: none"> when applicable other information about governance and administration (HM Treasury directions may require specific scheme information to be published). 	100%	Published on web or in newsletters when applicable
How to provide the information:		
<ul style="list-style-type: none"> maintaining information on a website that members can access 	100%	Available via member website: www.avonpensionfund.org.uk/pension-board Available via employer website: www.apfemployers.org.uk
<ul style="list-style-type: none"> including information in regular communication to members 	100%	Two newsletters to members per year (One newsletter to pensioner members per year). Scheme info also included in Annual Benefit Statements
Who to make information available to:		

<ul style="list-style-type: none"> all scheme members and all staff who are eligible to be automatically enrolled into the scheme without them needing to ask for it. 	100%	
<ul style="list-style-type: none"> other interested parties when they ask for it. 	100%	
<ul style="list-style-type: none"> including the contact name on the scheme website 	100%	
<ul style="list-style-type: none"> including this information in any document that sets out what information the scheme manager holds and how this information is made available to the public 	100%	Details Included in all scheme documentation
Keeping information up to date:		
The scheme manager should ensure that the scheme has processes in place to review information published about the pension board on an ongoing basis and must ensure that the information published is kept up to date	100%	Ongoing review of information to be published. Website updated on an ongoing basis and full review twice a year.

Annex B – Communication to members

Key information to be provided to members of public service pension schemes

Information	TPR requirement	APF compliance	Commentary/notes
Annual benefit statement – active members	Statements to be issued annually	100% for 2015/16 ABS	ABS statement (paper version) posted to all active members with complete data set by 31 August ABS statement available online to members signed up to “my pension online” (member self-service)
Benefit statement (upon request)	Within two months of the request, if not already provided within the previous 12 months upon request	100%	Benefits statement provided in post within two months of request Online self-service “my pension online” facility allow members to do their own projections statements/calculations/estimates

Deferred (upon request)	Within two months of the request, if not already provided within the previous 12 months	100%	As above
Pension credit (upon request)	Within two months of the request, if not already provided within the previous 12 months	100%	As above
Basic scheme information (upon request)	Members and prospective members: where the managers have received jobholder information, the information must be provided within one month of receiving that information. Where they have not received jobholder information, it must be provided within two months of the date the person became an active member. Where a request is received information must be provided within two months, if it has not already been provided within the previous 12 months	100%	<p>Scheme guides and factsheets available as hard copies and online via the APF website – these cover all the required elements outlined</p> <p>Information also provided in correspondence (letter/email) upon request</p> <p>Newsletters are posted twice a year to active members containing regulation updates and scheme information.</p>
Scheme information that has materially altered	Before or as soon as possible after the change takes effect, and within three months of the change taking effect at the latest	100%	<p>Scheme changes update on APF website</p> <p>Member newsletters (twice a year) also contain scheme change information.</p> <p>Direct communication (usually via post) available if any change relating to specific member's rights – for example a mailshot re: joining of records</p>
Constitution of the scheme (upon request)	Within two months of the request	100%	Full guides to the LGPS scheme available online via APF website or as hard copy on request
Transfer credits (upon request)	Within two months, if it has not already been provided within the previous 12 months	100%	Providing all relevant information received and legislation/guidance in place