

# Pensions Team Newsletter

March 2022

HELLO!

Welcome to the monthly Pensions Team Newsletter



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# Bulletin Breakdown!

## LGA Bulletin Updates

### DLUHC Updates

On 2 February 2022, the Department for Levelling Up, Housing and Communities (DLUHC) published the Levelling Up White Paper. The paper includes the **Government's intention to ask LGPS pension funds, to publish plans for increasing local investment**, including setting an ambition of up to 5% of assets invested in projects which support UK projects.

DLUHC email addresses have changed from @communities.gov.uk to @levellingup.gov.uk. The general contact address is now [lgpensions@levellingup.gov.uk](mailto:lgpensions@levellingup.gov.uk)

### Highlights from [HMRC Newsletter 137](#)

The newsletter included a request that we remind pension scheme members to tell HMRC in writing as soon as possible if they have lost their LTA protection.

### Consultation on reporting deadlines

[HMRC is consulting on draft regulations associated with extending the deadlines for Scheme Pays](#). The (Draft) Registered Pension Schemes (Miscellaneous Amendments) Regulations 2022 are in addition to the changes introduced by the Finance Act 2022.

The changes will apply to members of all UK pension schemes. It will be of particular relevance when dealing with members whose pension input amount for a past year is changed as a result of the McCloud remedy.

The Government proposes that the regulations take effect from 6 April 2022. The short consultation will close on 15 March 2022.

### Finance Act 2022 receives Royal Assent

**Annual allowance deadlines:** Deadlines for electing for scheme pays & associated payment & reporting deadlines will be extended for certain members who are informed of a change in pension input amount for a past pension input period.

**Normal minimum pension age:** The NPA will increase from 55 to 57 from 6 April 2028, but we do not know yet whether the LGPS Regulations will change to include a protected pension age.

**Power to change tax rules related to the McCloud remedy:** The Act provides HM Treasury with the power to make regulations to address tax impacts that arise as a result of implementing the McCloud remedy.

[You can read the full Bulletin \(220\) here.](#)

The 2022 Annual Update is also now available. [Read it here.](#)

## What's New?

### Developing your IT Skills

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#### Engagement & Education Team

There are a number of resources available to help you develop your confidence with technology and different IT Skills.

**The Surrey CC Digital Skills team** offer a wide number of free online courses to help you personalise your work laptop and brush up on the different features of: Microsoft Teams, OneDrive, SharePoint & Microsoft Forms.

[Click here to see the full range of courses available and to sign up for a course](#)

**The Tech Advocates team** provide support to service areas and individuals. In addition to offering bespoke support, they have an ever-expanding range of videos, guides and training documents. These cover a wide range of topics which include - getting the most out of your smartphone, laptop shortcuts, tips and tricks in MS Teams and the latest features of Excel.

They have a page on [JiveSurrey](#) where you can find out more about them, their drop-in sessions, tech lounge events and browse their guides.

### Future CIPP Courses

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#### Engagement & Education Team

There will be two CIPP (Chartered Institute of Payroll Professionals) Courses starting in autumn.

**Find out more about the two qualification courses by clicking the links below:**

[Certificate in Pensions Administration](#)

[Foundation Degree in Pensions Administration & Management](#)

**We will be sharing more information later in the year, but if you would like to express advance interest in either course, please speak to your Team Manager before emailing us at [Pensions.Communications@surreycc.gov.uk](mailto:Pensions.Communications@surreycc.gov.uk)**

## What's New?

### Retirement Process Video

#### Engagement & Education Team

To help members understand the retirement process better, we have worked with the IT team to produce our first animated video 'How to Retire'.

[Watch the video on Youtube here](#)

The video will be available on the Surrey Jive page & we will use it to explain the retirement process during our presentations to members.

If you have any suggestions for future video topics, please let us know!



## FOND GOODBYES

**Julia Bennett**

**Carole Peacock**

**Chloe Painter**

**Brooke Chandler**

I'm sure you'll join us in wishing them all the best for their future endeavors

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## CELEBRATING YOUR SUCCESS

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Big thanks to Ellie Calvert & Jennie Hall for turning an about to be a complaint into a triumph within an hour. Their help is very much appreciated.

*Bernadette*

Congratulations to Tim McCann for passing his 3rd assignment for his Certificate in Pensions Administration. Good luck with the Transfers module!

*The Engagement & Education Team*

Martin Millard & Kathryn Morgan

The Rev Fortier was overwhelmed but in a good way! Thanks to you both for what you have done. She wanted me to tell you that you have eased the stress of everything so much for her.

*Bernadette*

We would like to include the following in this Monthly Team Newsletter:

- Known Altair errors and any workarounds
  - Admin FAQ's
  - Thank you messages
  - Team updates
- Staff updates – joiners, leavers, promotions, studying towards professional qualifications etc.

But we can't do it without your input! If you have had any errors, questions or important updates please send them to us at [Pensions.Communications@surreycc.gov.uk](mailto:Pensions.Communications@surreycc.gov.uk) so we can share, celebrate & learn as a team!

## Warm Welcomes



### Lloyd Whitworth

#### Head of Investment & Stewardship

Hi, I'm Lloyd Whitworth and I joined Surrey in February as the Head of Investment and Stewardship. I've really enjoyed my first few weeks, especially given how warm the reception has been and how helpful everyone is. No doubt I will get to meet many more of you in the coming months.

Outside of work, I run three times a week, having started with the Couch to 5KM app a couple of years ago. It really does work. I also spend quite a lot of time in the garden and love watching all sport. My playing days for most sports ended a while ago and I find the longer the gap to last playing, the better I think I used to be.

**Experience:** Prior to joining, I was a fund manager specialising in UK and pan-European equities at various financial institutions, most recently Lazard Asset Management. Latterly I had two LGPS clients so I'm excited to see the view from the other side of the fence. It's going to be interesting holding my former peers to account.

**Skills:** I'm going to bring my experience of managing portfolios to how we position and monitor our investments.

I am a member of the CFA UK, the UK arm of the main professional body, and have recently taken the CFA Certificate in ESG Investing, reflecting the major changes that are sweeping through the industry. The area of responsible investing is, and will continue to be, a key focus for the team.

**Interesting fact:** I'm currently studying for the Wine and Spirits Education Trust diploma, having already gone through 3 levels of exams. Unfortunately, given the subject matter, this qualification is much more theoretical than practical!

**If you have any new Starters, are a new Starter yourself, or are moving into a new role, please let us know! Email your filled out profile to:**

[pensions.communications@surreycc.gov.uk](mailto:pensions.communications@surreycc.gov.uk)

# The Dakota Dashboard

## Temporary pause of new parking arrangements

With immediate effect, they are temporarily pausing the new car parking arrangements at Dakota. This decision has been taken based on the feedback received over the first few days of operation.

If you have any questions, please email [parking.admin@surreycc.gov.uk](mailto:parking.admin@surreycc.gov.uk)

[Find out more here.](#)

**Got a question about Agile Working?**

[Check out the Jive Hub page](#)

**BREAKING NEWS!**  
**BOILING TAP IN**  
**KITCHEN NOW FIXED!**

**Another reminder to complete the online ACT (Action Counters Terrorism) awareness eLearning**

- Log onto Olive
- Select 'My Development Plan' & scroll to 'My Learning' at the bottom of the page
- Search ACT Awareness

**The e-learning takes 45 minutes to 1 hour to complete**

**Fire Wardens Still Needed!**

**If you are interested in volunteering, please contact Adele ([Adele.Seex@surreycc.gov.uk](mailto:Adele.Seex@surreycc.gov.uk))**

**The training course can be found on Olive (Search Fire Training).**

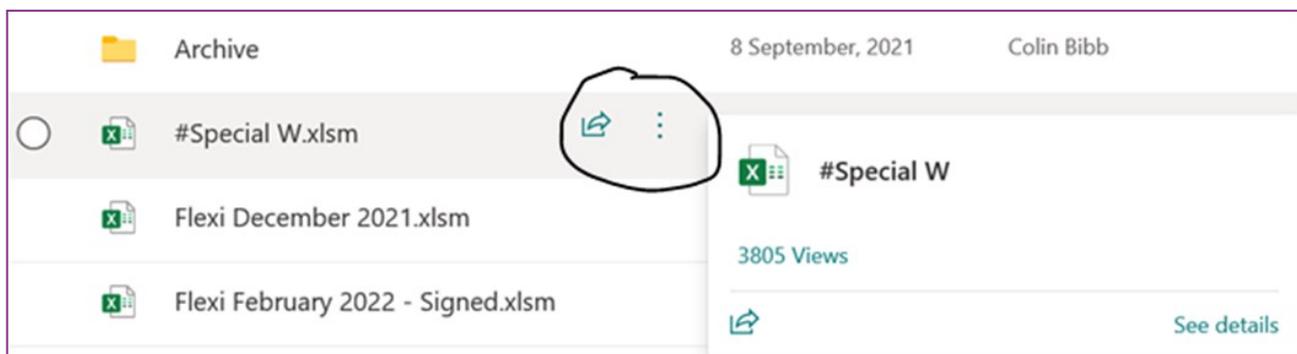
## Helpful Tips & Shortcuts

### Single-use spreadsheets on Sharepoint

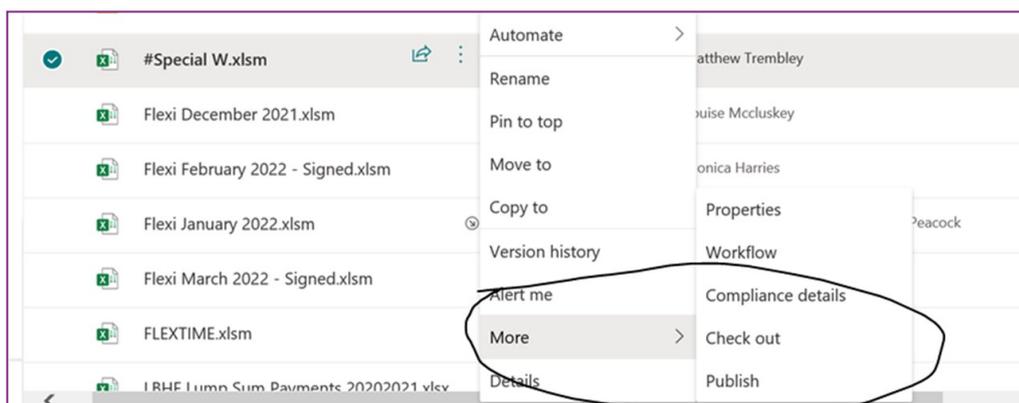
Kelly Sedgeman

A reminder of the workaround regarding single-use spreadsheets on Sharepoint.

First, choose the spreadsheet you wish to check out by finding the 3 dots to the right of the name of the spreadsheet.



Then scroll down to the bottom of the list and choose more, you will then see the Check Out option. Please click here, once the spreadsheet is checked out, you may continue as normal, enable content etc...



This is a separate issue to the “upload failed” error that you may have experienced and you’ll have to “clear the cache” within the options section (file>options>save>Cache settings>delete cache).

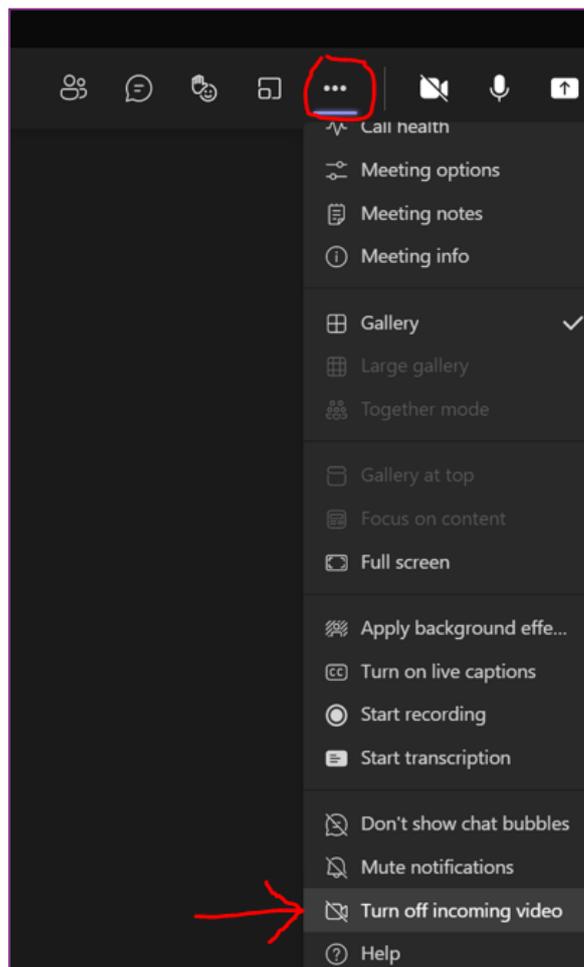
## Helpful Tips & Shortcuts

### MS Teams Tip

Thomas Elsam

If your internet is struggling when you are in a MS Teams meeting, particularly when lots of attendees have their videos on, select **“Turn off incoming video”** using the three dots at the top of the screen.

This should improve the quality of the meeting for you.



# Sow the Seed



**What would you like to see improved?**

*Ask yourself:*

- ◆ Are there any error messages you keep seeing in Altair?
- ◆ Are you always having to edit a document in the same way?
  - ◆ Are you constantly being asked the same questions?
- ◆ Is there any information you think might be missing from a piece of documentation?
- ◆ Got any changes (no matter how small) that you would like to see?

**Submit your idea highlighting a problem to**

**[sowtheseed@surreycc.gov.uk](mailto:sowtheseed@surreycc.gov.uk)**

**to win an hour of Flexi-time and sow a seed for improvement!**

# LGPS Puzzle Page

## LGPS Word Scramble

VCA

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PCA

\_\_\_\_\_

UCLB NTFERARS

\_\_\_\_\_

SGPL

\_\_\_\_\_

FNLA I AYP

\_\_\_\_\_

ANP

\_\_\_\_\_

OLAPENIESNB YPA

\_\_\_\_\_

RIPUNDEN

\_\_\_\_\_

TNVI GIES IOERDP

\_\_\_\_\_

**Unscramble the terms & submit your answers to**

**[Bethany.Goss@surreycc.gov.uk](mailto:Bethany.Goss@surreycc.gov.uk)**

**to be entered into a prize draw to win a £10 Amazon  
voucher!**

*(Email me for a hint!)*

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