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STATUTORY INSTRUMENTS

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**1986 No. 24**

**PENSIONS**

**The Local Government Superannuation Regulations 1986**

*Made - - - - 13th January 1986*

*Laid before Parliament 7th February 1986*

*Coming into Operation 1st March 1986*

**THE LOCAL GOVERNMENT  
SUPERANNUATION REGULATIONS 1986**

**PART A**

**PRELIMINARY**

- A1 Title and commencement
- A2 Interpretation
- A3 Application of regulations to Isles of Scilly

**PART B**

**PENSIONABLE EMPLOYMENT**

- B1 Pensionable employees
- B2 Persons treated as employees of a scheduled body
- B3 Power to admit employees of other bodies
- B4 Further provision as to admission of employees of other bodies
- B5 Treatment of certain additional duties
- B6 Treatment of certain separate employments
- B7 Deemed employments
- B8 Age of compulsory retirement

**PART C**

**PAYMENTS BY EMPLOYEES**

- C1 Appropriate superannuation fund
- C2 Payment and amount of employee's contributions
- C3 Leave of absence from duty
- C4 Absence due to trade dispute
- C5 Lump sum payment to increase reckonable service

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- C6 Periodical payments to increase reckonable service
- C7 Payment by manual worker in respect of previous service
- C8 Payments to avoid reduction of retiring allowance and death grant
- C9 Continuation of certain payments
- C10 Statement of remuneration received otherwise than from employing authority
- C11 Deduction and recovery of employee's contributions
- C12 Return of employee's contributions in certain cases
- C13 Effect of return to local government on right to a return of contributions
- C14 Restoration of right to reckon service in transitional cases where there has been a return of contributions
- C15 Reduction of returned contributions following payment in lieu of contributions
- C16 Limitation of payments

#### PART D

#### SERVICE

- D1 Reckonable service
- D2 Qualifying service
- D3 Exclusion from reckonable service and qualifying service
- D4 Increase of reckonable service on lump sum payment
- D5 Increase of reckonable service on making periodical payments
- D6 Increase of reckonable service on completion or cessation of payments under previous regulations
- D7 Increase of reckonable service at discretion of employing authority
- D8 Reduction of added years reckonable on payment as reckonable service
- D9 Previous service of certain whole-time manual workers
- D10 Previous service of certain variable-time employees
- D11 Previous service of certain re-employed pensioners

#### PART E

#### BENEFITS

- E1 Guaranteed minimum pension for certain pensionable employees and their widows
- E2 Entitlement to retirement pension and retiring allowance
- E3 Amount of retirement pension and retiring allowance
- E4 Ill-health retirement grant
- E5 Entitlement to widow's short-term and long-term pensions
- E6 Amounts of widow's short-term and long-term pensions
- E7 Widow's special short-term pension
- E8 Entitlement to children's short-term and long-term pensions
- E9 Amounts of children's short-term and long-term pensions
- E10 Children's special short-term pension
- E11 Death grant
- E12 Pensions of widowers etc
- E13 Discretionary additional benefits for certain female nursing staff
- E14 Reduction of retirement pension in the case of certain former teachers
- E15 Reduction of retirement pension in the case of certain re-employed pensioners
- E16 Combined benefits in the case of certain re-employed pensioners
- E17 Separate benefits in the case of certain re-employed pensioners

- E18 Adjustment of superannuation rights on death of certain re-employed pensioners
- E19 Benefits of certain persons employed before April 1974
- E20 Surrender of part of retirement pension
- E21 Power to compound certain small pensions
- E22 Pensionable remuneration
- E23 Pay restraint not to affect pensionable remuneration in certain cases
- E24 Certificates as to reduction in remuneration
- E25 Calculation of part-time service
- E26 Counting of non-contributing service
- E27 Disregard of certain reckonable service in determining entitlement to benefits
- E28 Counting of certain reckonable service and qualifying service in determining entitlement to benefits
- E29 Disregard of certain reckonable service in calculating amount of benefits
- E30 Counting of certain reckonable service in calculating amount of benefits
- E31 National Insurance
- E32 Benefits not assignable

#### PART F

#### WAR SERVICE

- F1 Interpretation etc
- F2 War service
- F3 Election as to war service
- F4 Modified application of regulation F3 in certain cases
- F5 Notice of election
- F6 Reckonable service and benefits
- F7 Revision of certain elections

#### PART G

#### MODIFICATION IN SPECIAL CASES

- G1 Employees of magistrates' courts committees
- G2 Certain employees of the committee of magistrates for the inner London area
- G3 Employees of probation committees
- G4 Coroners
- G5 Certain employees of City of London employing bodies
- G6 Certain former contributory employees
- G7 Former clerks of the peace etc.
- G8 Power to agree notional remuneration
- G9 Transfers from and to Scotland
- G10 Overseas employment

#### PART H

#### LOCAL GOVERNMENT REORGANISATION ETC

- H1 Interpretation
- H2 Continuity of employment and preservation of status
- H3 Discretionary powers
- H4 Contributions of transferred manual workers
- H5 Former employees of Manchester Corporation

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- H6 Persons transferred to scheduled bodies under section 18(4)(a) of the National Health Service Reorganisation Act 1973
- H7 Gratuities etc. granted by former local authorities
- H8 Policy schemes

PART J

INTERCHANGE ETC.

- J1 Interpretation
- J2 Outwards transfers
- J3 Additional transfer value on outwards transfer in certain cases
- J4 Amount of transfer value etc.
- J5 Termination of right to payment out of fund authority's superannuation fund
- J6 Rights where a person transfers to the Communities' scheme and leaves without a right to either an immediate or prospective pension
- J7 Compound interest on certain sums
- J8 Inward transfers
- J9 Right to reckon service
- J10 Increase in return of contributions
- J11 National Insurance modification for flat-rate retirement pension
- J12 National Insurance modification for graduated retirement pension
- J13 Certain persons who become subject to other superannuation schemes
- J14 Transfer of pension rights

PART K

GRATUITIES

- K1 Power to grant gratuities
- K2 Application to certain other bodies

PART L

INJURY ALLOWANCES ETC.

- L1 Interpretation
- L2 Persons to whom Part L applies
- L3 Loss of employment through permanent incapacity
- L4 Reduction in remuneration
- L5 Allowances for pensioners
- L6 Death benefits
- L7 The relevant body
- L8 Rights and payments to be taken into account in determining amount of benefit
- L9 Retrospective Effect
- L10 Finance
- L11 Appeals
- L12 Notice of decisions

PART M

FORFEITURE ETC.

- M1 Forfeiture of rights
- M2 Transfer of certain sums from the superannuation fund

- M3 Recovery or retention by employing authority of certain sums from the superannuation fund

#### PART N

#### DECISIONS AND APPEALS

- N1 Initial decisions
- N2 Decisions by employing authorities as to status of employees
- N3 Decisions by administering authorities as to status of employees
- N4 Decisions by administering authorities as to war service
- N5 Decisions by employing authorities as to benefits
- N6 Decisions by administering authorities as to benefits
- N7 Notification of decisions
- N8 Appeals

#### PART P

#### SUPERANNUATION FUNDS AND PAYMENTS BY AUTHORITIES

- P1 Superannuation funds
- P2 Management of superannuation fund
- P3 Use and investment of superannuation fund's moneys
- P4 Accounts and audit
- P5 Periodical valuation of superannuation fund
- P6 Actuary's certificates
- P7 Employer's contributions
- P8 Employer's additional contributions
- P9 Employer's further payments
- P10 Payments by employing authorities to administering authorities
- P11 Extra charges resulting from early retirement of chief officers
- P12 Liability for combined benefits
- P13 Provision as to protection of pensions

#### PART Q

#### INTERFUND ADJUSTMENTS

- Q1 Interpretation
- Q2 Change of local government employment and fund authority
- Q3 Partial forfeitures
- Q4 Greater London Council housing staff transfers

#### PART R

#### MISCELLANEOUS POWERS AND DUTIES OF AUTHORITIES

- R1 Information to be supplied by certain employees
- R2 Records to be kept by authorities
- R3 Transmission of documents and information
- R4 Payments due in respect of deceased persons
- R5 Provisions as to contributions equivalent premiums

#### PART S

#### MISCELLANEOUS AND SUPPLEMENTAL

- S1 Periods of time

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- S2 Application to benefits in respect of former employments
- S3 Revocations

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SCHEDULE 1 — GLOSSARY OF EXPRESSIONS

SCHEDULE 2 — PENSIONABLE EMPLOYEES

PART I

PART II

PART III

- 1. The requirements to be satisfied in order that a whole-time...
- 2. A notice under paragraph 1(b) must also contain a declaration...

SCHEDULE 3 — MAXIMUM LENGTH OF ADDITIONAL PERIODS

- 1. (1) Subject to paragraph 2, the maximum length of the...
- 2. (1) In the case of a person who at the...

SCHEDULE 4 — AMOUNT TO BE PAID FOR ADDITIONAL PERIOD

PART I — LUMP SUM PAYMENT

- 1. The amount to be paid by an employee who has...

PART II — PERIODICAL PAYMENTS

- 2. The amount to be paid by way of additional contributions...
- 3. (1) For the purposes of paragraph 2, in relation to...

SCHEDULE 5 — PAYMENT TO AVOID REDUCTION OF RETIRING ALLOWANCE

PART I — LUMP SUM PAYMENT

- 1. The amount to be paid by an employee who has...
- 2. The amount is to be paid within one month after...

PART II — INSTALMENTS

- 3. The amount to be paid by an employee who has...
- 4. The employee is to specify in his notice of election...
- 5. Instalments are to be of equal amounts and to be...

PART III — ADDITIONAL CONTRIBUTIONS

- 6. The amount to be paid by way of additional contributions...
- 7. (1) For the purposes of paragraph 6, in relation to...
- 8. An employee is to specify in his notice of election...
- 9. Additional contributions are to be paid, at such intervals as...

PART IV — UNCOMPLETED PAYMENTS

- 10. This Part applies where an employee has under regulation C8...
- 11. The relevant events are— (a) the discontinuance of payment under...
- 12. Where the relevant event is the discontinuance of payment under...
- 13. Where the relevant event is— (a) the death of the...
- 14. (1) Where the relevant event is the employee's ceasing to...
- 15. (1) Where the relevant event is the employee's ceasing to...

SCHEDULE 6 — OUTSTANDING PAYMENTS UNDER 1974 REGULATIONS

- 1. Paragraphs 2 to 7 apply while any amount is outstanding...
- 2. Compound interest, calculated at the rate of 3% per annum...
- 3. If a benefit calculated by reference to the length of...
- 4. If benefits become payable to or in respect of the...
- 5. Subject to paragraphs 6 and 7, if the employee ceases...

6. If the employee becomes entitled to preserved benefits and does...
7. (1) If the employee ceases to hold his employment and—...

#### SCHEDULE 7 — LIMITATION OF PAYMENTS UNDER PART C

#### SCHEDULE 8 — UNCOMPLETED PAYMENT OF ADDITIONAL CONTRIBUTIONS

1. This Schedule applies where an employee has made an election...
2. The relevant events are— (a) the discontinuance of payment under...
3. Where the relevant event is the discontinuance of payment under...
4. Where the relevant event is— (a) the death of the...
5. (1) Where the relevant event is the employee's ceasing to...
6. (1) Where the relevant event is the employee's ceasing to...

#### SCHEDULE 9 — ADDITIONAL RECKONABLE SERVICE FOR ILL-HEALTH

1. (1) This Schedule applies for the calculation of the additional...
2. (1) Subject to sub-paragraph (2) and paragraphs 3 and 4,...
3. (1) Subject to paragraph 4, this paragraph applies where before...
4. (1) This paragraph applies where— (a) the person either—

#### SCHEDULE 10 — REDUCTION OF BENEFITS ON EARLY PAYMENT

#### SCHEDULE 11 — MODIFICATIONS TO PART E WHERE NO RIGHT TO RETIRING ALLOWANCE ETC.

##### PART I

1. In regulation E2(1), delete the words “and a lump sum...
2. In regulation E3— (a) in paragraph (1), for the words...
3. In regulation E11— (a) in paragraph (1)(b), after the word...
4. In regulation E17, delete paragraph (6)(a)(iii) and (v).

##### PART II

5. In regulation E3, delete paragraphs (4) to (11).
6. In regulation E11, delete paragraph (10).

##### PART III

7. In regulation E6, for paragraphs (2) to (4) substitute:
8. In regulation E5— (a) in paragraph (1), delete sub-paragraph (b)...
9. In regulation E11— (a) in paragraph (1)(b), delete the words...

#### SCHEDULE 12 — SURRENDER OF PART OF RETIREMENT PENSION

##### PART I — LIMITS ON AMOUNT SURRENDERED

1. (1) The part of the retirement pension surrendered on any...
2. Where the person falls within regulation E20(2)(b), references in paragraph...

##### PART II — PROCEDURE

3. Upon a person's first becoming eligible to notify his wish...
4. Where a person wishes to make a surrender he may—...
5. On receipt by the appropriate administering authority of a notification...
6. Any fee payable to a practitioner in respect of an...
7. (1) Subject to the provisions of this schedule, unless the...
8. A person who has given a notification of his desire...
9. (1) A notification given by a person under paragraph 4...

#### SCHEDULE 13 — WOMEN'S SERVICES

1. Member of Queen Alexandra's Royal Naval Nursing Service or any...

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2. Member of the Women's Royal Naval Service.
3. Woman medical or dental practitioner serving in the Royal Navy...
4. Member of Queen Alexandra's Imperial Military Nursing Service or any...
5. Member of the Territorial Army Nursing Service or any reserve...
6. Member of the Auxiliary Territorial Service.
7. Woman employed with the Royal Army Medical Corps or the...
8. Member of Princess Mary's Royal Air Force Nursing Service or...
9. Member of the Women's Auxiliary Air Force.
10. Woman employed with the Medical Branch or the Dental Branch...
11. Member of the Voluntary Aid Detachments employed under the Admiralty,...

#### SCHEDULE 14 — PUBLIC SERVICE SCHEMES

##### PART I

1. Regulations from time to time in force under the Police...
2. Orders and regulations from time to time in force under...
3. The Firemen's Pension Scheme brought into operation under section 26...
4. Orders from time to time in force under section 10...

##### PART II

5. The Teachers (Superannuation) Act 1925 and rules from time to...
6. A 1923 Act scheme within the meaning of the Teachers...

##### PART III

7. Provisions of or under the Local Government Superannuation (Scotland) Act...
8. Regulations from time to time in force under section 67...
9. Regulations from time to time in force under section 61...
10. Regulations from time to time in force under section 2(1)...

#### SCHEDULE 15 — MODIFICATION IN SPECIAL CASES

##### PART I — EMPLOYEES OF MAGISTRATES' COURTS COMMITTEES

1. Where— (a) a person is employed by two or more...
2. Without prejudice to regulation B6, a person who holds two...
3. Regulation C10 (statement of remuneration received otherwise than from employing...
4. The body paying the person's remuneration are to be treated—...
5. (1) A magistrates' courts committee are to report to the...
6. In the case of a person who—
7. Regulation B8 (age of compulsory retirement) has effect as if...
8. Schedule 9 (additional reckonable service for ill-health) has effect with...

##### PART II — CERTAIN EMPLOYEES OF THE COMMITTEE OF MAGISTRATES FOR THE INNER LONDON AREA

1. The Receiver for the Metropolitan Police District is to be...
2. (1) The committee of magistrates are to report to the...
3. Regulation B8 (age of compulsory retirement) has effect as if...
4. Schedule 9 (additional reckonable service for ill-health) has effect with...

##### PART III — EMPLOYEES OF PROBATION COMMITTEES

1. For the purposes of the definition of “employee” in Schedule...
2. In relation to a pensionable employee of the probation committee...
3. (1) The probation committee for the inner London area are...
4. (1) The probation committee for an area other than the...
5. (1) In the application of regulation E25 (calculation of part-time...

##### PART IV — CORONERS

1. Regulation B8 (age of compulsory retirement) has effect as if...



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2. Schedule 9 (additional reckonable service for ill-health) has effect with...  
PART V — CERTAIN EMPLOYEES OF CITY OF LONDON EMPLOYING BODIES
  1. In this Part, unless the context otherwise requires, “existing contributor”,...
  2. In relation to existing contributors and former contributors, these regulations...
  3. In relation to an existing contributor or former contributor who...
  4. In relation to existing contributors and former contributors these regulations...
  5. In relation to existing contributors these regulations have effect with...

#### SCHEDULE 16 — CALCULATION OF TRANSFER VALUES

##### PART I

1. The transfer value payable under regulation 12, 13(1), 114 or...
2. (1) The sums in respect of accrued pension, accrued retiring...
3. In this Schedule— “accrued pension” means the annual retirement pension...

##### PART II

##### PART III

##### PART IV

##### PART V

1. The transfer value payable under regulation Q2(1) in respect of...
2. In any case not falling within paragraph 1 the transfer...
3. In ascertaining for the purposes of this Part the length...
4. Subject to paragraph 5, in ascertaining for the purposes of...
5. If— (a) during the 13 years ending on the cessation...
6. Where the person has made a payment to his new...
7. Compound interest calculated in accordance with regulation J7 is to...

##### PART VI

#### SCHEDULE 17 — CALCULATION OF RECKONABLE SERVICE TO BE CREDITED UNDER REGULATION J9(1)(a)

1. Subject to the provisions of this schedule, the period which...
2. For the purposes of paragraph 1 above—

#### SCHEDULE 18 — FUND APPORTIONMENT WHERE 100 OR MORE TRANSFER THEIR PENSION RIGHTS UNDER REGULATION J14

##### PART I

1. This Part of this Schedule applies if the fund is...
2. The appropriate administering authority shall obtain a report from the...
3. The apportionment fraction is—  $[ A B \times ( C ...$
4. The relevant date is the date on which those transferring...
5. The accrued actuarial liabilities of the fund are the actual...
6. The transferable assets of the fund are the assets which...
7. The values of items D and E are to be...
8. Subject to paragraph 7 above, valuations are to be made...
9. Where more than one approved non-local government scheme is involved,...
10. When the appropriate administering authority receive the actuary's report they...
11. The value of the share of the fund to which...
12. The apportionment date is the date specified as such by...
13. Except with the agreement of the scheme managers of the...

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14. Subject to paragraphs 15 to 17 below, immediately after the...
  15. The appropriate administering authority and the scheme managers may agree...
  16. The value of an advance under paragraph 15 shall not...
  17. Where an advance is made under paragraph 15, the appropriate...
  18. The employing authority shall bear the costs of apportioning the...
  19. The appropriate administering authority shall keep their accounts in a...
- PART II
20. This Part of this schedule applies where the fund is...
  21. The provisions of Part I of this schedule are to...
  22. If any question arises in connection with paragraph 21 above,...

SCHEDULE 19 — FUND APPORTIONMENT FOR CHANGES OF FUND WITHIN  
LOCAL GOVERNMENT

PART I

1. This Part of this Schedule applies if the fund is...
2. The previous fund authority shall obtain a report from their...
3. The apportionment fraction is—  $A B \times ( C + \dots$
4. The relevant date is the date on which the change...
5. The accrued actuarial liabilities of the fund are the actual...
6. The transferable assets of the fund are the assets which...
7. The values of items D and E are to be...
8. Subject to paragraph 7, valuations are to be made by...
9. Where more than one new fund authority is involved, separate...
10. When the previous fund authority receive the actuary's report they...
11. The value of the share of the fund to which...
12. The apportionment date is the date specified as such by...
13. Except with the agreement of the new fund authority, the...
14. Subject to paragraphs 15 to 17, immediately after the apportionment...
15. The previous fund authority and the new fund authority may...
16. The value of an advance under paragraph 15 shall not...
17. Where an advance is made under paragraph 15, the previous...
18. The previous employing authority shall bear the costs of apportioning...
19. The previous fund authority shall keep their accounts in a...

PART II

20. This Part of this Schedule applies where the fund is...
21. The provisions of Part I of this Schedule are to...
22. If any question arises in connection with paragraph 21, it...

SCHEDULE 20 — REVOCATIONS

PART I — ENACTMENTS HAVING EFFECT AS REGULATIONS UNDER  
SECTION 7 OF THE SUPERANNUATION ACT 1972

PART II — INSTRUMENTS HAVING EFFECT AS REGULATIONS UNDER  
SECTION 7 OF THE SUPERANNUATION ACT 1972

PART III — OTHER INSTRUMENTS

Explanatory Note