

ACADEMY MERGERS AND ACADEMY TRUST CHANGES



West Midlands Pension Fund

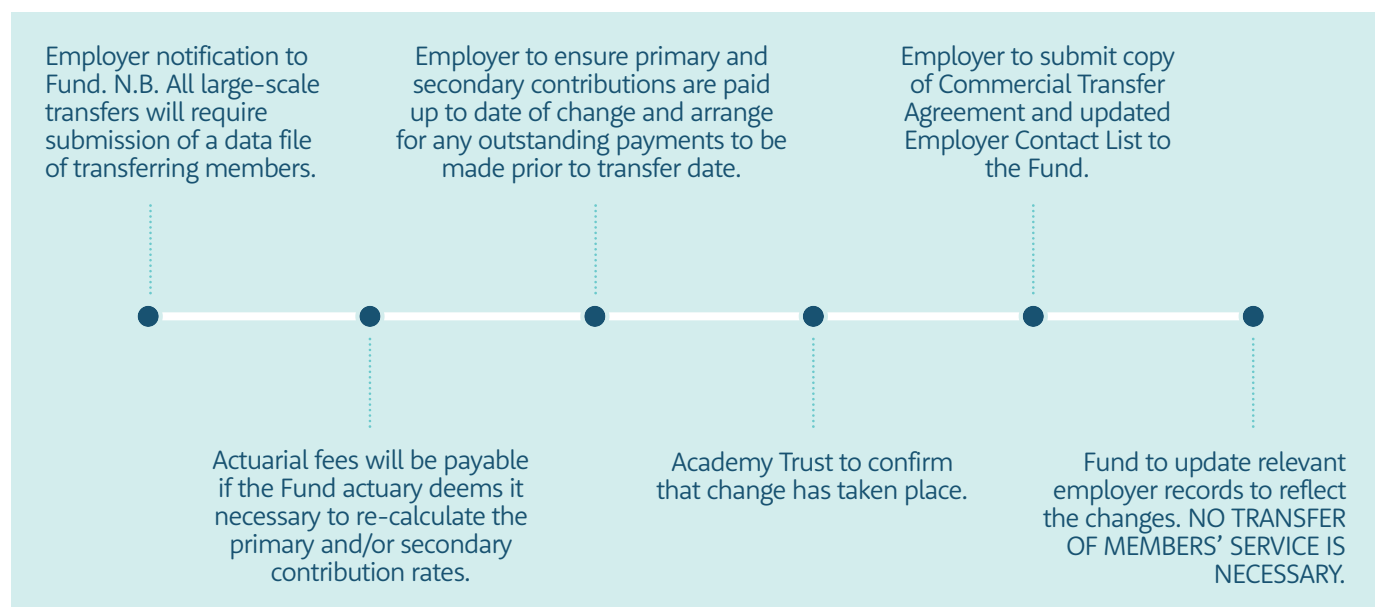
FACT SHEET

As outlined in the Fund's *Pensions Administration Strategy*, academies are responsible for notifying the Fund in advance of any employer initiatives, such as any changes in respect of the Academy Trust or academy mergers which could have an impact on LGPS member benefits.

In the first instance, please notify the Fund of any proposed changes by emailing us at wmpfemployerliaison2@wolverhampton.gov.uk

ACADEMY TRUST CHANGES

Process Requirements



Please note that we are unable to confirm exact timescales due to various factors which may affect the application process.

The Fund will require:

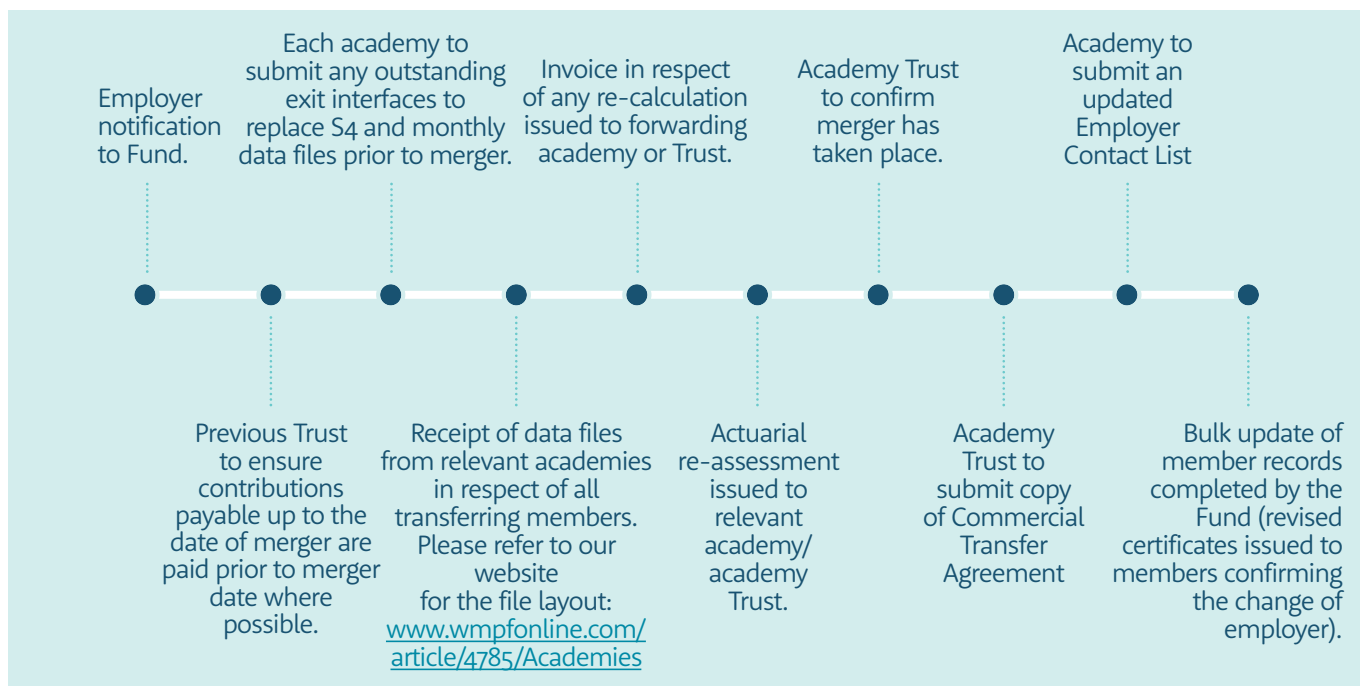
- A copy of the Commercial Transfer Agreement signed by all parties to confirm the transfer of all assets and liabilities from ceding Trust to the new Trust. Further information is available on the government website [here](#).
- A completed Employer Contact List to reflect the change of Trust and any subsequent contact or payroll changes. Please request a copy of the list from us at wmpfemployerliaison2@wolverhampton.gov.uk
- For Academy Trusts new to the Fund, a copy of the Memorandum and Articles of Association for our records.

The Fund actuary will be informed of any prospective large-scale transfers in advance. Fees of up to £495+VAT may be incurred if the actuary deems a re-calculations of the secondary contribution rate necessary before the next triennial valuation.

Where the assets and liabilities in respect of the former academy members are not transferring to the new Trust, then we will create a new record for the academy with the new Trust on our system and process a termination on the previous academy record with the Ceding Trust. Relevant member records will be TUPE transferred across on our system.

ACADEMY TRUST MERGERS

Process Requirements



Please note that we are unable to confirm exact timescales due to various factors which may affect the application progress.

The Fund will require:

- Data file of transferring members from ceding Academy/Academy Trust.
- A copy of the Commercial Transfer Agreement signed by all parties to confirm the transfer of all assets and liabilities to the new Trust. Further information is available on the government website [here](#).
- A completed Employer Contact List to reflect any subsequent contact or payroll changes. Please request a copy of the list from us at wmpfemployerliaison2@wolverhampton.gov.uk

The Fund actuary will be informed of any prospective large-scale transfers in advance. Fees will be incurred if the actuary deems a re-calculations of the primary and/or secondary contribution rates necessary before the next triennial valuation.

Employer's Contribution Rate After the Changes.

When an academy changes MAT or an academy Trust merges with another in the inter-valuation period, the general principle is that their contribution rate shall be aligned with that of the MAT to which they are joining/merging with from the effective date of the change. Significant changes in membership will require a recalculation of the primary contribution rate.

Monthly Data Submissions

From the effective date of change, the employer/payroll provider will be required to submit one monthly interface (in a standard format) a month (by 19th of the following month) via Employer Self-Service. The one monthly submission file will enable employers to notify the Fund of new joiners and employee/employer contributions and earnings.

Members who will be subject to the TUPE transfer must not be flagged as new joiners on the monthly interface. This will create a duplicate record for the members, which may incur a charge for data rectification. Only new members that joined on/after the academy conversion and any members that previously opted out should be flagged as a new joiner.

Further information about the monthly submission process can be found [here](#).

Additionally, please view the video on 'How to submit a monthly data file' on our website [here](#).

In order to submit monthly files, access to Employer Self-Service is required. Further information about the Employer Self-Service can be found [here](#).