

**APPENDIX F**

**LOCAL PENSION BOARD – TRAINING PROGRAMME (April 2019)**

Topic	Good level of Knowledge & Understanding	Date Report or Presentation/Training Provided
<b>Background to Legislative Framework</b>		
Key provisions of the Public Service Pensions Act 2013	✓	Training 14/12/15
Overview of roles and responsibilities associated with the Local Government Pension Scheme	✓	Training 14/12/15, Training 16/6/16, 4/12/2017
<b>Roles and Responsibilities of the Local Pension Board</b>		
Assisting the Scheme Manager – governance and administration	✓	Report 19/6/15, Training 9/12/15
Potential conflicts of interest	✓	Each meeting
Reporting of breaches	✓	Report 9/10/15, Report 3/10/16, Training 18/6/18
Knowledge and understanding	✓	Report 14/12/15, Training 16/6/16
<b>Roles and Responsibilities of the Scheme Manager</b>		
Pension Regulations	✓	Presentation 19/6/15, Training 8/2/2016, Report 18/6/18
Legislation	✓ (some)	Training 9/12/15
Calculation and payment of benefits	✓	Presentation 19/6/15 (further training agreed), Training 8/2/16
Annual Benefit Statements	✓	Report 9/10/15, Report 14/12/15, Training 18/6/18
Discretions	✓	Training 7/11/16
Internal dispute resolution (stage 1,2, TPAS, Ombudsman)	✓	Training 16/6/16, Training 18/6/18
Record keeping	✓	Training 7/11/16, Report and Training 18/6/18, Report 3/12/18

Internal controls and risk management	✓	Report 9/10/15, Report 3/10/16, Report 18/6/18
Reporting of breaches	✓	Report 9/10/15, Report 3/10/16, Training 18/6/18
Administration of Local Pension Board	✓	Training 8/2/16
Managing potential conflicts of interest	✓	Training 8/2/16
Admission Bodies – Bonds/Guarantees	✓	Discussed at the Local Pension Board meeting 16/6/16, Training 7/11/16, Training and Report 3/12/18
<u>Topic</u>	Good level of Knowledge & Understanding	Date Report or Training Provided
<b>Roles and Responsibilities of the Scheme Employers</b>		
Providing pension information to the administering authority	✓	Report 4/3/2016, Report 16/6/16, Report 12/3/18
Year-end	✓	Report 4/3/2016, Report 16/6/16, Report 18/6/18, Training 4/3/19
Automatic enrolment	✓	Training 7/11/16
Deduction and payment of contributions	✓	Training 7/11/16, Report 12/3/18
Internal dispute resolution (stage 1)	✓	Training 16/6/16 (further training required in roles and responsibilities for scheme employers)
<b>Roles of Advisers and Other Key Persons / Bodies</b>		
Officers of the Authority	✓	Training 16/6/16, 4/12/17, 18/6/18
Auditors	✓	Training 16/6/16, 4/12/17, 18/6/18
National Scheme Advisory Board	✓	Training 16/6/16, 4/12/17, 18/6/18
Department for Communities and Local Government	✓	Training 16/6/16, 4/12/17, 18/6/18
Local Government Association	✓	Training 16/6/16, 4/12/17, 18/6/18
Pensions Advisory Service	✓	Training 16/6/16, 4/12/17, 18/6/18

Pensions Ombudsman	✓	Training 16/6/16, 4/12/17, 18/6/18
The Pensions Regulator	✓	Report 9/10/15, Training 9/12/15, Training 16/6/16, 4/12/17, 18/6/18
Additional Voluntary Contribution (AVC) Provider - Prudential	✓	Report and training 8/12/16, 4/12/17, 18/6/18, Report 4/3/19
<b>Investments</b>		
Actuarial Valuation	✓	Pension Board Meeting – to hear from the Pension Fund Actuary 26/2/2016
Different Asset Classes	✓	Training 14/12/15
Decision-making process	✓	Training 14/12/15
Risk vs. Reward	✓	Training 14/12/15
LGPS Asset Pooling	✓	Training 14/12/15

### Summary of Events/Training

#### 19 June 2015 - Reports

Role of the Local Board

External audit plan

Internal audit arrangements

Quarterly administration report (introduction)

#### 19 June – Presentation

Introduction to Pensions

#### 9 October 2015 – Reports

Quarterly administration report (annual benefit statements, partnership working)

Managing pension section workloads

Joint administration and communication strategy

Reporting breaches of the law to The Pension Regulator

Risk register

#### 13 November 2015 – Pension Board Reports

Invited to attend the Pension Board (investments)

#### 9 December 2015 – Training

Governance regulations

TPR

Statutory deadlines

Pension taxation

#### 14 December 2015 – Reports and Training

Quarterly administration report (exit cap, GMP rec and valuation)

Annual benefit statements

Board members – knowledge and understanding

Local pension board and Local pension committee – key roles and responsibilities (training item)

#### 8 February 2016

Administration of Local Pension Boards, Managing potential conflicts of interest (training item – M Hand)

State scheme changes, GMPs and GMP reconciliation

26 February 2016

Invited to attend the Pension Board – Pension Fund Actuary, Year-end and the Actuarial Valuation

16 June 2016

Roles of advisers and other key persons/bodies (including the Pension Ombudsman – IDRs)

LGA Trustee Training event details (3 days split over Oct, Nov, Dec 2016) Ms D Stobbs, Ms D Haller, Ms A Severn-Morrell

3 October 2016 – Reports

Risk management and internal controls

Pension fund governance and administration

7 November 2016 – Training

Record keeping

Deduction and payment of contributions

Automatic enrolment

Admission bodies – bonds and guarantors

Discretions

8 December 2016 – Reports and Training

Additional Voluntary Contributions (AVCs) - Prudential

13 March 2017 – Training

Service Plan; system tender, IConnect, GMP rec, SLA

12 June 2017 – Report

Year End and statutory deadlines

18 September 2017 – Reports and Training

Record keeping

Pension Taxation – Annual and Lifetime Allowance

4 December 2017 – Training

Roles of advisers and other key persons/bodies

LGA Trustee Training event details (3 days split over Oct, Nov, Dec 2017) Cllr Jennings, Cllr Bedford

12 March 2018 – Reports

Administration and Communication Strategy (draft) – includes, providing pension information to the administering authority and deduction and payment of contributions

18 June 2108 – Reports and Training

Local Government Pension Scheme (Amendment) Regulations 2018

Internal controls and risk management

Year-end

Breaches, annual benefit statements, IDRPs, record keeping, roles of advisers and other key persons/bodies

17 September 2018 – Training

Pension Taxation – Annual and Lifetime Allowance

3 December 2018 – Reports and Training

Record Keeping

Admission Bodies – Bonds and Guarantors

17 and 18 January 2019

LGA Trustee Training Event attended by Mrs Stobbs

4 March 2019 – Reports and Training

Additional Voluntary Contributions (AVCs) – Prudential

Valuation – year-end

To monitor Board Members training, dates of the reports and training are recorded.

IH 01/04/2019

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