

# Report of the Director, West Yorkshire Pension Fund, to the meeting of West Yorkshire Pension Fund Pension Board to be held on 13 September 2023

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## Subject: Training Update

### Summary statement:

The role of The Pension Board, as defined by sections 5(1) and (2) of the Public Service Pensions Act 2013 is to assist the Council as Scheme Manager in ensuring the effective and efficient governance and administration of the Local Government Pension Scheme (LGPS) including securing compliance with the LGPS regulations and any other legislation relating to the governance and administration of the LGPS; securing compliance with the requirements imposed in relation to the LGPS by the Pensions Regulator; and any other such matters as the LGPS regulations may specify.

To be able to assist the Scheme Manager and meet the requirements of the Public Service Pensions Act 2013, Pension Board Members must be able to demonstrate suitable knowledge and skills of the LGPS to effectively scrutinise the decisions made by officers.

The training of Pension Board members to understand their responsibilities and the issues they are dealing with is a very high priority. Details of training courses, conferences and seminars listed may assist Board Members.

### EQUALITY & DIVERSITY:

None

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**Overview & Scrutiny Area**

## 1. Summary - Training and Events

- 1.1 If any Pension Board member would like any specific training through one to one meetings with the in-house team, then this can be arranged.
- 1.2 Pension Board members should consider the following training and events.

- **TPR Public Service Toolkit**

The Trustee toolkit is aimed specifically at Trustees of Occupational Pension Schemes. The Public Service Online Toolkits is aimed specifically at Public Service schemes including the LGPS and includes a series of online learning modules and downloadable resources developed to help Board Members meet the **minimum** required level of knowledge and understanding as defined by the Public Service Pensions Act 2013. <https://trusteetoolkit.thepensionsregulator.gov.uk/>

All Pension Board members should complete the Pension Regulators toolkit training. Once completed a copy of the completion certificate should be sent to the Governance and Business Development Manager (Sukhjot.kaur@wypf.org.uk).

The mandatory training includes Modules across a range of pension topics including;

- Conflicts of Interest
- Maintaining Accurate Member Data
- Providing Information to Members and Others
- Reporting Breaches of the Law
- Managing Risk and Internal Controls
- Maintaining Member Controls
- Resolving Internal Disputes

Each modules takes approximately 30 to 60 minutes to complete and Board Members are requested to complete a minimum of two prior to each Board meeting until all modules are completed.

TPR Regularly update the content and may amend or add additional modules for Trustees.

- **Hymans Robertson online Learning Academy**

Hymans Robertson have produced an online training centre specifically for the LGPS and is aimed at Local Pension Board Members and scheme practitioners.

The Learning Academy aids the knowledge and skills required of Board Members to fulfil their statutory duties and has 6 tutorials which include presentations, a glossary and question and answers. It can also be used as a record of all other training achievements and events attended.

Each modules takes approximately 30 to 60 minutes to complete and Board Members are requested to complete a minimum of two prior to each Board meeting until all modules are completed.

Please Note: Hymans have suspended access to modules whilst they undertake a refresh and update to the training material. Matt Mott will contact all Board Members with details when this is relaunched shortly.

- **Training Strategy**

At the June 2022 Pension Board a training Strategy Report was submitted to Board Members. The Board agreed to adopt a training strategy. That strategy required all Board Members to complete the TPR toolkit and the Learning Academy with 12 months.

Following TPR's Supervisory Engagement TPR made several recommendations, one of which, is that the Public Sector toolkit should be completed within 6 months of joining the Board.

TPR consider the Toolkit to be part of initial or induction training and to meet their expectation the Training Strategy has been amended. All Pension Board members will now be required to complete the Toolkit training within 6 months of joining the Board or within 6 months if any modules are updated, meaning all Board members who have not yet completed their TPR Toolkit should do so by 31 March 2024.

The revised Training Strategy is included as Appendix A

- **Training Record of Achievements**

TPR also included in their recommendations a record of training to date.

WYPF already report on training completed by Board Members within the Fund's annual Report and Accounts, however, we will now bring to each Board the most current record of achievements.

The most current training record is included in Appendix B

- **LGA Fundamentals training programme 2023**

Fundamentals is a bespoke three-day training course aimed at elected members and others who attend pension committees/panels and local pension boards. Past delegates include elected members, trade union representatives, member and employer representatives, as well as a variety of officers who attend/support committees and some private sector organisations who provide services to administering authorities. The course provides a scheme overview and covers current issues in relation to administration, investments and governance of the LGPS.

Attending all three days will assist delegates in meeting the relevant requirement for knowledge, skills and understanding either required in statute or encouraged by relevant guidance.

Each day has a different theme and will include sessions delivered by experts in their field. The event also provides delegates with valuable networking opportunities. Each day's programme will start at 10am, with registration and coffee from 9:30am, and close by 4pm with refreshments and lunch provided.

#### Fundamentals Training Programme

Fundamentals Day 1 Manchester, 5 October 2023 Piccadilly Hotel

Fundamentals Day 1 London, 12 October 2023 LGA offices

Fundamentals Day 1 online, 19/26 October 2023

Fundamentals Day 2 London, 2 November 2023 LGA offices

Fundamentals Day 2 Manchester, 8 November 2023 Piccadilly Hotel

Fundamentals Day 2 online, 16/23 November 2023

Fundamentals Day 3 London, 5 December 2023 LGA offices

Fundamentals Day 3 Manchester, 13 December 2023 Piccadilly Hotel

Fundamentals Day 3 online, 11/19 December 2023.

We recommend early booking as places are limited. Please contact Matt Mott or Suki Kaur if you wish to attend.

- **LGA Annual Governance Conference**

The annual conference retains its popular lunchtime to lunchtime format. It will start on Thursday 19 January 2024 and end on Friday 20 January 2024 and will take place in York. The programme is currently being finalised and further details will be provided late in the year.

- **Training at Board Meetings**

It is the intention of WYPF to provide additional training as part of the Board Meetings. These may be planned topics to support the existing training, current “hot” topics, or training presented prior to a discussion of a particular report. Training topics may also be at the suggestion of the Board or a Board Member.

Where additional training is not provided as part of the Board Meetings there may be an update or summary of training completed to date and events attended by Board Members.

- **LGA circulars and bulletins**

- Members can also make use of the LGA website where circulars, bulletins and updates are published on a regular basis.

- <http://www.lgpsregs.org/index.php>

- **Scheme Advisory Board website**

- Members can find lots of useful information on the Scheme Advisory Boards website

- <https://www.lgpsboard.org/>

## 2 OTHER CONSIDERATIONS

None

## 3 FINANCIAL & RESOURCE APPRAISAL

None

## 4 RISK MANAGEMENT AND GOVERNANCE ISSUES

None

5. **LEGAL APPRAISAL**

None

6. **OTHER IMPLICATIONS**

7.1 **SUSTAINABILITY IMPLICATIONS**

None.

7.2 **TACKLING THE CLIMATE EMERGENCY IMPLICATIONS**

None.

7.3 **COMMUNITY SAFETY IMPLICATIONS**

None.

7.4 **HUMAN RIGHTS ACT**

None.

7.5 **TRADE UNION**

None.

7.6 **WARD IMPLICATIONS**

None

7.7 **AREA COMMITTEE ACTION PLAN IMPLICATIONS  
(for reports to Area Committees only)**

None

7.8 **IMPLICATIONS FOR CHILDREN AND YOUNG PEOPLE**

None.

7.9 **ISSUES ARISING FROM PRIVACY IMPACT ASSESMENT**

None.

8. **NOT FOR PUBLICATION DOCUMENTS**

None

9. **OPTIONS**

N/A

10. **RECOMMENDATIONS**

It is recommended that Members of the Local Pension Board complete TPR Public Sector Toolkit online training, including the Scam module, by 31 March 2024 and the Hymans Robertson online Learning Academy Training upon its relaunch and meet the expectations of TPR and the requirements defined by the Public Service Pensions Act 2013.

Board Members are also encouraged to attend external training events provided by PLSA, LGA & Actuarial firms. Consideration should also be given to Local Pension Board Member representation at various national events such as the PLSA Conference and LGA Governance conference.

11. **APPENDICES**

Appendix A – TPR Supervisory Report Draft Action Plan  
Appendix B – Pension Board Training and Attendance Record

12. **BACKGROUND DOCUMENTS**

None