

LGPS Training Focus Group minutes

17 January 2024

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Attendees

- Lisa Clarkson - Local Government Association (LGA)
- Toni Durrant - Local Government Association (LGA)
- Karl White - Local Government Association (LGA)
- Joel Ellner - Essex Pension Fund
- Lindsey Davison - South Tyneside
- Alexander Thompson – Peninsula Pensions
- Heidi Catherall – Cheshire Pension Fund
- Kevin Gerard – Dyfed Pension Fund
- Martin Doyle – Wandsworth Pension Fund
- Debbie Patten – Southwark Pension Fund
- Jennifer Stevenson – Surrey Pension Fund
- Liz Manuel – Bedford Pension Fund
- Jon Clewes – Nottinghamshire Pension Fund
- Teresa Eaton-Watts – East Riding of Yorkshire

Apologies for absence

- Melissa McCarthy – Peninsula Pension Fund
- Kaele Pilcher – West Yorkshire Pension Fund

Minutes of the last meeting

Karl White talked through the actions from the last meeting. Toni Durrant was introduced to the group as the new training advisor.

LGA training report

Karl White reported since the last meeting the Retirements course had been written and rolled out, with five sessions being run, four online and one in London. Two Insight courses have been run, one in Bournemouth, and one online.

This year's schedule was outlined.

Lisa Clarkson confirmed six online employer role days have been delivered.

Jon Clewes asked if information on which employers had attended employer training could be released. Lisa confirmed that the LGA have looked into this previously and were unable to share this information but would check again. There is also an issue because some employers belong to more than one Fund which makes it difficult to report accurately.

Update on progress on LGPS specific qualification/apprenticeship

Lisa Clarkson updated the group on the progress on the Award in Pension Essentials (APE) course. There are eighteen signed up to the pilot which is running from April 2024. The APE is a level two generic qualification which is being run by Barnet Waddingham. It was confirmed that this could not be funded through the apprenticeship levy.

Karl White gave an update on the level three qualification. The learning outcomes had now been created and the PMI had assisted in creating the syllabus. The first three module's assessments were being created for approval by PMI to ensure they were at the correct level. The course material would then be written.

The assessment is by multiple choice exam. The group made some comments on the importance of calculations and asked whether these could be assessed effectively through this medium. Lisa and Karl said that there would be calculation questions broken down and case studies would be used. The working group could potentially assist with feeding back on the assessments.

There was a discussion on the level of experience required to go on the qualifications. The need for a level 4 or 5 was also discussed. Karl confirmed that

this is on the longer term plan but would need the level 3 to be piloted first. Feedback would be taken from the pilot as well.

Lisa gave an update on the apprenticeship and confirmed that the LGA would be assisting funds by providing information on this through information sessions or a webinar.

Action

- LGA to ask for help, if needed, from the group

Employer service

Lisa Clarkson intends to update the employer role course to include some practical exercises. Lisa asked if there had been any feedback on ill health training for employers. There had not been, however this was probably more due to engagement. Teresa Eaton-Jones asked if there was a roadmap for further training, Lisa replied that discretions was the next one and any suggestions were welcomed.

Liz Manuel asked if it was possible to commission employer training, and Lisa confirmed this.

Action

- Suggestions for further employer bitesize to be provided to Lisa

Administering authority training

Karl White gave an update on plans to split the retirement course into advanced and basic levels. Feedback was requested on the experience level of staff put on courses and the general consensus was that it was mixed. Jon Clewes also fed back that new staff had been positive about the courses attended.

Toni Durrant discussed plans to add more bitesize courses for practitioners, starting with the development of a course on interpolation.

Karl White mentioned that although the upcoming transfers course was sold out online that there had been no requests to be added to the waitlist. He added that it was important as further events would be run based on this. Joel Ellner requested a bulletin article to reinforce this.

Action

- Attendees to raise awareness of commissioning option

- LGA to add information on waitlist in bulletin

Commissioned training

Karl White confirmed that LGA is happy to consider any requests received from individual Funds but there had not been any requests for joint commissioned training. This is still an option.

Any other business

None

Date of next meeting

11 July 2024 (provisional)