

# LGPS Training Focus Group minutes

11 July 2024

## Attendees

- Karl White – Local Government Association (LGA)
- Lisa Clarkson - Local Government Association (LGA)
- Toni Durrant - Local Government Association (LGA)
- Eilidh Williams – North East Scotland Pension Fund
- Jennifer Stevenson – Surrey Pension Fund
- Kevin Gerard – Dyfed Pension Fund
- Liz Manuel – Bedfordshire Pension Fund
- Martin Doyle – Wandsworth Pension Fund
- Melissa McCarthy – Peninsula Pensions
- Deborah Patten – Southwark Pension Fund
- Richard Quinn – West Yorkshire Pension Fund
- Teresa Eaton-Watts – East Riding Pension Fund
- Joel Ellner – Essex Pension Fund
- Heidi Catherall – Cheshire Pension Fund

## Apologies

- Emma Whysall – Derbyshire Pension Fund
- Lorraine Bennett (LGA)

## Minutes of the last meeting

No comments or actions from the previous minutes.

## LGA training report

Karl White reported that since the last meeting the following courses had been run:

- Five Employer Role - online
- Three Insight - 1 online, 1 in York, 1 commissioned face-to-face
- Eight Transfer - 4 online 1 in person (London), 3 commissioned face-to-face – 3 more commissioned to come.
- Five Aggregation - 2 online, 1 in person, 2 commissioned – 2 to come.
- One Survivor - commissioned face-to-face.
- One Retirements - commissioned face-to-face.

The Survivor's course is to be updated over summer for McCloud. This work has already been carried out on Transfers, Retirements and Insight. There is also the potential for Goodwin to impact upon the Survivor course at any time.

Karl explained the LGA decision to not run a standalone McCloud course, rather deal with the impact of McCloud within the individual courses.

The team are continuing to find online courses popular though commissioned is generally requested face-to-face.

The decision has been taken to send out certificates of attendance for each course (as a record of CPD) to all attendees.

Karl confirmed that a windows version of the [LGPS training app](#) is now available. This will aid delegates to access notes and quizzes used in the training sessions without needing to download an app, which can prove difficult on work devices. Delegates are handed a course code to enter on the day of their training.

### **Update on the Award in Pension Essentials (APE)**

Lisa Clarkson gave some background on the Award in Pension Essentials (APE) for the newer members of the Focus Group. The APE is a level 2 – GCSE level qualification. It is awarded by PMI and delivered by Barnett Waddingham (BW). The LGA collates applications for this qualification. It is not LGPS specific and also covers defined contribution schemes.

It is being piloted with 18 students. It has been successful so far and will roll out further. An article will appear in the July bulletin with further information. The cost will be £950 per student.

Barnett Waddingham have capacity for new intakes every couple of months, no larger than 18 at a time.

Lisa confirmed APE needs completing within a year: 5 exams, 5 weeks per cycle. A sixth exam cycle is included in the price for any potential resits.

Lisa confirmed that the aim is for an April 2025 start for the LGPS specific L3 qualification, to be advertised in November. Maybe 2 intakes per year (April and September). There is no pre-requisite to complete a level 2 qualification in order to do level 3.

### **Update on progress on LGPS specific qualification**

Karl outlined the level 3 (A level equivalent) LGPS specific qualification. The team are devising questions and have a good bank of questions over all 6 modules, with further good progress on materials and action plan to work towards getting the qualification ready to start

from April 2025. Meetings with PMI and BW are ongoing as the team work towards the final details of the exams and other practicalities.

Karl then discussed the qualification being accredited versus unaccredited. Karl invited feedback and after careful consideration the team have decided to progress with the qualification being unaccredited for now.

The qualification will be named 'Level 3 Certificate in Local Government Pension Scheme (LGPS) Administration'.

### **Employer service (Lisa)**

Lisa confirmed that the 2024 employer role courses are progressing well. This year's course has more practical exercises – pay calculations, APP etc. Courses run have been full – 18 per course. Upcoming courses are filling up nicely with an average of a course per month. Lisa asked for any suggestions for future additions to the employer service.

Funds commented that they had shared links to the employer bitesize courses with their employers and had received good feedback. Lisa confirmed that discretions is on her to do list as an employer bitesize course, but with the ongoing training programme and qualification work there were capacity issues at the moment.

### **Actions:**

Contact Lisa if any suggestions for employer bitesize.

Contact Toni if any suggestions for administrator bitesize. (Interpolation course is with the technical team for checking, to be released shortly).

### **Admin authority training**

#### **1. Feedback**

Lisa invited verbal feedback from the group in addition to the written feedback requested after each course, for any of the courses run so far.

The Understanding Transfers course was mentioned; whilst ok for experienced staff to keep up, was a lot in one day. Toni Durrant confirmed this aligned with feedback already received from delegates.

#### **2. Splitting courses**

Toni had prepared a proposal on how to split the transfer course and to what effect, which had been shared previously with the group.

After a brief overview Toni invited feedback on the proposal.

The group agreed that splitting into two separate courses – Understanding Transfers In and Understanding Transfers out seemed the best solution. There was discussion around whether two consecutive days would be preferable rather than having a more lengthy period of time between the two parts of the training, in order to keep impetus. Some of the group would expect that both days had to be attended to have achieved understanding transfers, rather than totally separate courses for outs and ins. This is still to be decided.

It was asked if there was a plan to review the duration of aggregation training. Lisa explained that there was no feedback yet to indicate that any further revision of the Aggregation course was required.

#### **Actions:**

LGA to determine whether the training courses will be delivered on consecutive days, or with set time in between, or whether there will be a requirement to complete both days of the training at all.

Toni to develop the new look courses for delivery in 2025.

### **3. Programme for 2025**

Lisa invited suggestions for topics for the 2025 programme: Pension Tax, Transfers, Retirements, Survivors, Insight.

Lisa highlighted that requests for in-person courses have picked up. Currently our face-to-face courses are held in our London office to avoid the cost of cancelling venues if courses don't sell. The team would like to start to run courses in more locations around the Country. West Midlands Pension Fund have offered the use of their offices as a central venue.

In-person preferred by a number of the group. It helps with conversations around the topics and contacts are established. From a training perspective engagement is easier as well.

POGs have asked about Annual Allowance/Pensions tax course. Karl explained this is currently out of date, with exercises and examples still built around £40k. LTA needs changing to LSA/LSDBA so it will be quite a bit of work to update. The course does include more complex AA examples such as interfunds and transfers in etc.

The group were reminded of the flip side in that in-person can be tricky for some people, for example insight requiring 3 nights away from home.

### **4. Insight costs**

The cost has now increased for online Insight to £625+VAT, reflecting 2.5 days contact time. This new cost is shown on the new course due to be added for November, added to meet demand.

Lisa went on to discuss the in-person Insight, the 3 night residential currently run in York and Bournemouth at a cost of £899+VAT. Bournemouth runs at a loss, and is subsidised by the LGA reserves. Whilst research into cheaper venues is being conducted, the group were asked if they would be prepared to pay more.

The consensus was that training is valuable and as such funds will pay what is required. Lisa also confirmed that Insight could be commissioned.

### **Commissioned training**

Karl reiterated that the group should take commissioning training to POGs. We fit in as much as we can and are dealing with a number of requests at present.

The team can run commissioned, bespoke, training in Scotland should it be required.

### **AOB**

N/A