

LGPS Training Focus Group minutes

22 January 2025

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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
- Emma Whysall – Derbyshire Pension Fund
- Martin Doyle – Wandsworth Pension Fund
- Melissa McCarthy – Peninsula Pensions
- Deborah Patten – Southwark Pension Fund
- Richard Quinn – West Yorkshire Pension Fund
- Joel Ellner – Essex Pension Fund
- Gareth Wookey – Kent Pension Fund

Apologies

- Heidi Catherall – Cheshire Pension Fund
- Vicky Jenks – Shropshire Pension Fund

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 28 courses had been run:

- Seven Employer Role – five online, one in person (London), one commissioned face-to-face
- Five Insight - three online, one in person (Bournemouth), one commissioned face-to-face
- Three Transfer - all commissioned face-to-face
- Four Aggregation - two online, two commissioned face-to-face
- Nine Survivor benefits – four online, one in person (London), four commissioned face-to-face
- One Retirements - commissioned face-to-face.

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

Certificates of attendance for all courses are being sent out by email to all attendees.

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 has been piloted with 18 students, of which 11 completed the course within the initial five exam cycles. Seven are yet to finish and are waiting for the next exam cycle for resits. Issues were spread throughout the different units and overall we are happy with the pass rate. Due to the success of the pilot the course is continuing, with 18 students required for each cohort to go ahead.

A second cohort started in December 2024 and a third is due to start soon. There is already enough interest for a fourth cohort to start in later spring.

Action:

Interest to be registered through the qualifications section of the lgpsregs.org website.

Update on progress on LGPS specific qualification

Toni Durrant outlined the level 3 Certificate in LGPS Administration qualification. This new qualification is awarded by PMI and delivered by the LGA's LGPS Training and Development team. As with the APE, interest can be registered through the qualifications section of the lgpsregs.org website.

Cohort one will be capped at 36 students and will start in April 2025. The exams are restricted to an 1:18 ratio for invigilation purposes. Two concurrent exams will take place at the same time. In the future this could be scaled up to three if there is enough demand.

The learner pack is being collated which will include information about the course and exam guidance. Policies for equality, complaints etc. are in place and legal agreements are in the process of being finalised. The maximum timescale for completing the course for students is four years.

The group was asked for questions, comments or feedback. There were some questions from the group answered by Toni:

Toni confirmed that 18 months was the minimum timescale and four years was the maximum allowing for resits and breaks in learning.

One resit per module is covered within the course fee with any further resits being chargeable.

Currently there are no plans to extend the course to Scottish funds as it is England and Wales specific, though they can put staff on the generic level two course (the APE).

Although the first cohort is now full, future registrations can be made now through the website.

There will be two intakes a year, in April and September.

Action:

Interest to be registered through the qualifications section of the lgpsregs.org website.

Administering authority and employer service

1. Feedback

Toni asked for any general feedback from the group. Some positive feedback was given from the Wales group for recent training as well as Peninsula Pensions who also felt the notes were very useful. Toni mentioned that the surveys were being revamped to enable easier and more useful feedback from delegates.

2. Programme

The 2025 programme is now available on the training and development section of the lgpsregs.org website and all dates are open for booking. Available courses are also listed in the monthly bulletin.

Transfers has been split and is now offered as Transfers out (one day) and Transfers in (half day). Retirements has also been split into an intermediate and advanced course. Aggregation is also on the programme for 2025. Employer role will continue to run on a rolling basis.

The dates are the current maximum offer for bookable training due to the new qualification development, and there is capacity for some commissioned training. The group was asked for feedback.

Will a pension taxation course be available? Currently there is no capacity to run pension taxation this year due to the course needing rewriting following the abolition of the Lifetime allowance.

How many courses are sold out? Approximately two thirds of the places have been taken to date. Online Insight is sold out but there will be another scheduled in later in 2025, with those on the waitlist offered places before they are advertised more widely.

Can courses be commissioned for Scotland? As courses need to be adapted and due to current workloads this is not viable. However, if there was a commitment to meeting minimum numbers (at least 15 per course) this could be added to the long term workplan of the team. It was noted that the LGA provided both transfer training

aggregation training to Scotland in 2022 but the numbers attending these courses were lower than expected.

3. Capacity

Toni fed back that capacity has been increased from 15 to a maximum of 18 on all courses. This was trialled successfully on Employer Role and Insight in 2024 and has been rolled out to all courses from 2025.

Commissioned training

Funds or groups of funds can commission training for a group, choosing from the training courses currently available. Requests have been asked for by the end of January and will be considered. Requests can be made after the end of January but the team is less likely to be able to accommodate these.

The training team's policy is to not allow any bookings from a fund which has outstanding unpaid invoices. There will also be an exercise to cancel bookings for advertised training for those funds.

The list of available courses and costs are on the training and development section of the lgpsregs.org website.

Fundamentals and committee training

1. Current offering and feedback

Lisa confirmed that for Fundamentals 2025 a northern venue will no longer be offered due to low take up over the past few years. Fundamentals will be either available to book online or in London. Views were requested from the group on governance training.

Several group members fed back that it was a struggle to get committee members signed up to training. Many favour online or the TPR toolkit. It can be a battle as some are resistant to training, though new members were more open.

Feedback on the Fundamentals 2024 training has been very positive. Bitesize training was discussed.

2. Potential future developments

Lisa said that new offerings are being considered. There was potential for working with the Scheme Advisory Board to develop more training and that suggestions would be brought to the next meeting.

Training team update

As Lisa had been promoted she was no longer solely responsible for employer training, although would continue to run the employer role course in 2025. A new team member, Jennifer Rice from Essex Pension Fund, has been recruited bringing the team number to four. Jennifer will need to be bedded into the team first before delivering courses and will also work on the qualification.

The team might be in the position to add additional training dates towards the end of 2025, all dependent on how much time the qualification takes.

KG asked whether one extra staff member is enough. LC said that this would be kept under review.

Apprenticeships

The group was asked whether any use the pension administration apprenticeship or if they knew of other Fund's experiences.

None of the group had, though the business administration apprenticeship had been used by one fund successfully. One of the group had been through an apprenticeship but felt that the trend towards homeworking made it difficult to take on an apprentice as it was hard to provide the support that is needed.

The question was asked whether the current level 3 pensions administration apprenticeship can work in the LGPS as it is not specific, in the context of putting together the portfolio. LC confirmed that it was.

Group membership

KW stated that not all pension officer groups (POGs) had two representatives on the focus group. When the group was set up there were two from each Fund but this had dropped. The group was asked for their views as to whether they were happy to have one representative or felt that two were essential.

There were no views that two representatives were essential, but some preferred that there were two. Ad-hoc attendance would be useful also.

Action:

KW agreed to email all POG chairs to state that they could have up to two representatives and that they could put forward names, though this was not essential.

AOB

None

Date of next meeting

10 July 2025