

LGPS Training Focus Group minutes

10 July 2025

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Attendees

- Lisa Clarkson - Local Government Association (LGA)
- Toni Durrant - Local Government Association (LGA)
- Jennifer Rice - Local Government Association (LGA)
- Eilidh Williams – North East Scotland Pension Fund
- Kevin Gerard – Dyfed Pension Fund
- Emma Whysall – Derbyshire Pension Fund
- Martin Doyle – Wandsworth Pension Fund
- Deborah Patten – Southwark Pension Fund
- Gareth Wookey – Kent Pension Fund
- Vicky Jenks – Shropshire Pension Fund
- Daniel Frost – Essex Pension Fund
- Katherine Morrison – South Yorkshire Pension Fund
- Caroline Aislabie – North Yorkshire Pension Fund
- Jessica Turnbull-Guy – Dyfed Pension Fund
- Sian Shepherd – Wiltshire Pension Fund

Apologies

- Richard Quinn – West Yorkshire Pension Fund
- Joel Ellner – Essex Pension Fund
- Melissa McCarthy – Peninsula Pensions

- Jennifer Stevenson – Surrey Pension Fund

Minutes of the last meeting

No comments or actions from the previous minutes.

Team news

Jen Rice (JR) joined the LGPS Training and Development Team from Essex Pension Fund in February. Karl White retired on 31 May. Gareth Wookey will join the team from Kent Pension Fund in August.

LGA training report

JR reported that since the last meeting on 22 January 2025, 36 courses had been run:

- Transfers out – four online, one in person (London), two commissioned in-person
- Transfers in – five online, two commissioned (online)
- Aggregation – four online, one in person (London), one commissioned in-person
- Employer role – four online
- Survivor benefits – three commissioned in-person
- Insight – two online, one in-person (York), one commissioned in-person
- Intermediate retirements – two online, one in-person (London)
- Advanced retirements – two online

Update on the Award in Pension Essentials (APE)

Lisa Clarkson (LC) gave an update on the Award in Pension Essentials (APE). The APE is a generic level 2 pension qualification awarded by PMI and delivered by Barnett Waddingham. It is not LGPS specific and covers defined contribution schemes.

There are now 89 students enrolled on the APE, made up of five cohorts. Cohort one have all completed the qualification, and the majority of cohort two are preparing for their final exam. Cohort five will sit their first exam in September. Barnett Waddingham is able to take on new cohorts of up to 18 students every two to three months.

We will continue to promote and collate interest in the APE. We have started to collect feedback from students who have completed their studies and will share this with Barnett Waddingham.

Funds can register their interest in the APE through the qualifications section of the lgpsregs.org website.

Update on the Certificate in LGPS Administration

Toni Durrant (TD) provided an update on the Certificate in LGPS Administration qualification. The qualification is awarded by PMI and delivered by the LGA's LGPS Training and Development team.

Cohort one has 36 delegates. They sat their first exam on 24 June 2025, with the resit a week later. 34 students passed the initial exam. Two delegates took the resit; one passed and the other will sit the exam again with cohort two. Those that failed were given feedback on subject areas to focus on during their studies.

The team has a lot of data from cohort one covering both the mock exam and the actual exam and resits which will be used to shape the qualification in the future.

The group discussed whether it was appropriate for the learning materials to be searchable after a query was raised by a Fund participating in cohort one. LC explained that it was a considered decision to allow the materials to be searchable. It was agreed that there would be no immediate change, but the team will continue to monitor this as the qualification progresses.

Cohort two has 54 delegates who will start their studies from September.

Funds can now register interest for cohort three via the qualifications section of the lgpsregs.org website. Cohort three will start studying in April 2026.

Engagement during online training

The group was asked for suggestions on how to improve engagement during online training. LC offered examples of issues that the training team have encountered, including delegates leaving sessions early without prior notice or approval, delegates only accepting meeting invitations for part of the course, and joining the meeting but not switching on camera despite repeated requests and subsequently not responding to polls or answering questions in the chat, so there is no way for the trainer to know whether the individual is actually participating in the training.

LC outlined actions being taken by the team to encourage greater engagement, including setting out expectations for active participation both in meeting invitation emails and throughout the course, which was reiterated in a recent bulletin article. A range of tools are used to encourage engagement including using the chat function, verbal participation, polls, breakout rooms, quizzes, and asking low-stake or opinion-based questions to build confidence. Where delegates fall short of expectations, feedback may be given to their manager.

The group agreed that this is a widespread issue with online training, and that while delegates are responsible for their own learning, involving managers more in the process may be beneficial. For example, making them aware of course content and areas of participation ahead of the course, as well as sending email prompts to managers to encourage them to address expectations with delegates before the course and to follow up on outcomes afterwards.

Actions:

The team will investigate how to obtain managers' email addresses if they are different from the course booker and will consider contacting managers to provide feedback on students attending courses.

Training courses in 2026

JR confirmed that the Insight, Fundamentals, Aggregation and Employer Role courses would all return in 2026, along with the new look Intermediate and Advanced Retirements courses and the Understanding Transfers in and Understanding Transfers Out courses.

The Survivor Benefits course will not be run until legislative changes are implemented due to the substantial changes that will need to be made to it.

Two new courses will be added in 2026 - the Tax course which has been heavily revised to account for the removal of LTA and introduction of LSA and LSDBA, and a half day course on Additional Contributions.

Upcoming tax course

TD provided the proposed outline for the revised Tax course which will run from next year and requested feedback from the group on any topics not mentioned that should be included.

Action:

Comments and suggestions to be emailed to training.lgps@local.gov.uk.

AOB

A request was made for an automatic email response to be created when submitting an expression of interest in the qualifications, in order to create a paper trail for Funds.

The team was asked whether there were any plans to develop further LGPS specific qualifications at a higher level. LC confirmed that although this is something that the team would like to assess the feasibility of in the future, there are no immediate plans to do this. This is partly due to the significant resource needed to create and maintain a new qualification alongside running the existing qualification, and also the need to see a number of cohorts through to completion on the Certificate in LGPS Administration and assess the success of this before a decision can be made about the viability of further qualifications.

Action:

The team will investigate adding an auto-response email.

Date of next meeting

22 January 2026