

LGPS Training Focus Group minutes

22 January 2026

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Attendees

- Lisa Clarkson - Local Government Association (LGA)
- Toni Durrant - Local Government Association (LGA)
- Jennifer Rice - Local Government Association (LGA)
- Gareth Wookey – Local Government Association (LGA)
- Eilidh Williams – North East Scotland Pension Fund
- Kevin Gerard – Dyfed Pension Fund
- Emma Whysall – Derbyshire Pension Fund
- Deborah Patten – Southwark Pension Fund
- Vicky Jenks – Shropshire Pension Fund
- Caroline Aislabie – North Yorkshire Pension Fund
- Sian Shepherd – Wiltshire Pension Fund
- Joel Ellner – Essex Pension Fund
- Jennifer Stevenson – Surrey Pension Fund
- Tegan Galloway - Peninsula Pensions
- Helen Dighton – Kent Pension Fund
- Heidi Catherall – Cheshire Pension Fund
- Megan Cawley – Buckinghamshire Pension Fund

Apologies

- Katherine Morrison – South Yorkshire Pension Fund

- Richard Quinn – West Yorkshire Pension Fund
- Martin Doyle – Wandsworth Pension Fund

Minutes of the last meeting

No comments or actions from the previous minutes.

LGA training report

Jennifer Rice (JR) reported that since the last meeting on 10 July 2025, 38 courses had been run:

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

Training courses in 2026

JR confirmed that the Insight, Fundamentals, Aggregation and Employer Role courses would all return in 2026, along with the Intermediate and Advanced Retirements courses and the Understanding Transfers in and Understanding Transfers Out courses. The Survivor Benefits course will also return in the second half of 2026. The course will be updated to include upcoming legislative changes.

Two new courses have been added in 2026 – a half day course on Additional Pension Contributions and the Understanding Tax Allowances in the LGPS course which has already sold out for England and Wales. Places are still available for the Scotland specific date. An additional date will be scheduled and offered to those on the waiting list first.

The group asked whether engagement with online training had improved since the last meeting. Toni Durrant (TD) confirmed that it had, with students more consistently joining with cameras on and participating more actively. TD thanked the group for their support.

Commissioning training

JR outlined that the Insight, Aggregation, Intermediate and Advanced Retirements, Understanding Transfers In and Transfers Out, Additional Contributions, Survivor Benefits and Understanding Tax Allowances courses are all available to be commissioned, and reiterated the minimum and maximum number of attendees required.

Enquiries should be emailed to training.lgps@local.gov.uk, however requests received after 30 January 2026 may not be accommodated in 2026 due to workloads.

The group asked whether training could be commissioned regionally rather than by individual administering authorities, and whether residential courses could be hosted in the north or west to improve access. It was confirmed that groups of Funds can commission training jointly, and that varying locations for in-person and residential courses will be considered for 2027.

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 two pension qualification awarded by PMI and delivered by Barnett Waddingham. It is not LGPS specific and covers defined contribution schemes.

Six cohorts have participated in the APE with a seventh due to start studying in April. 55 students have completed the course successfully. Barnett Waddingham can take on new cohorts of up to 18 students every two to three months, and there is no limit on how many students each Fund can put forward.

Funds can register their interest in the APE through the [Pensions qualifications](#) section of the lgpsregs.org website.

Update on the Certificate in LGPS Administration

LC 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 students, 34 of whom are currently studying towards unit four. After three exam cycles, there have been 20 resits. The number of resits required has increased in line with the gradual increase in difficulty of the unit topics.

Cohort two has 47 students who sat their first exam cycle in November. This exam cycle had an 11% failure rate, however the 89% were successful attained a high average pass mark.

Cohort three has 52 students and will start studying in April 2026.

Funds can now register their interest in cohort four using the [Pensions qualifications](#) section of the lgpsregs.org website. Cohort four will start studying in September 2026 and already has a number of Funds registered.

LC outlined changes for cohort three:

- The resit fee has increased to £100 per exam cycle to better reflect the costs involved of providing additional exam cycles.
- An admin fee has been introduced for students wishing to take a break in learning. The fee is £250 and is payable when the student returns to learning. It is hoped that introducing the fee will encourage greater consideration of the commitment needed to complete the course, following five delegates deferring or withdrawing from cohort two prior to the first exam. These are places that could have been allocated to other students.
- Exam dates will now be published ahead of enrolment on the course to allow potential delegates to confirm that they do not have any conflicting activities already planned for those dates before commencing the course.

Queries have been received about whether students should receive study leave. LC reiterated that while the LGA recommends 40 hours study per unit, the decision to offer study leave rests with each individual Fund.

A small number of students have experienced technical issues when joining exams on Microsoft Teams, including being unable to join or joining late due to laptop, camera, or microphone problems. Cameras and microphones must be switched on to maintain exam integrity. LC confirmed that students receive reminders in advance, including instructions on checking functionality and compatibility. Funds were asked to support their students by carrying out these checks and ensuring familiarity with Teams to reduce disruption and distress caused by late or failed joining.

LC also updated the group on the potential expansion of LGA qualifications to include level four or five options, and a Scotland-specific level three. The team does not currently have capacity to introduce new qualifications. The aim is to see several cohorts complete the current level three certificate before evaluating its success.

However, a Scotland-specific level three qualification will be prioritised when resources allow.

Kevin Gerard (KG) queried whether there were plans to further expand the LGA Training Team to meet the training and qualification needs of LGPS Funds. LC explained that the team had already expanded over recent years, and that a period of stability was required to assess the success of the current offering. A decision on expanding further would need to be addressed by the wider organisation.

KG queried how POGs could best communicate their need for an expanded LGA Training Team and the wider range of courses and qualifications that could then be run. LC assured KG that whilst any feedback provided to the LGA by individual Funds or POGs would be given consideration, specific action was not currently required.

The group passed on their thanks to the LGA Training Team for the work done to create the qualification and commented that early feedback from students on cohort one and two was positive.

Upcoming survivor benefits course

Gareth Wookey (GW) provided the proposed outline for the revised Survivor Benefits course which will run in 2026 and requested feedback from the group on any topics not mentioned that should be included and queried whether the course was likely to be used to introduce a new topic to staff, or as a refresher for more experienced staff. Responses from the group suggested that both approaches are used, and that splitting the course into an intermediate and advanced course in the future could be useful.

GW will also be trialling splitting the course into two half days to increase accessibility for part time staff.

Action: Course content set out in [Paper 1](#). GW asked if this could be discussed at POGs to identify any additional topics to cover or whether any areas require particular focus. This will assist with improving the course content over 2026/27. Feedback to be emailed to training.lgps@local.gov.uk.

Mentoring proposal

GW proposed a trial LGPS mentoring programme to address recruitment and retention challenges, improve knowledge transfer, support junior staff who lack networking opportunities, and overcome the limited career progression available

within Funds. Mentoring would help establish clearer career pathways, developing both technical and soft skills while building cross-Fund and cross-region relationships.

The proposal is for a 12-month pilot with around 20 mentor–mentee partnerships, representing different levels and roles. Each pair would meet six times via Microsoft Teams and be matched by skills, experience and aspirations. After a year, the programme would be reviewed to assess usefulness and whether it should be adopted permanently.

Initial responses were mixed: some welcomed a formal framework for peer support and offered to act as mentors, while others wanted to consult their Fund or POG before confirming interest.

Action: Mentoring proposal to be fed back to Funds through the next round of POGs. Any feedback is welcomed to assess the level of interest across the wider LGPS network and to determine whether a mentorship programme would be useful. Feedback to be emailed to training.lgps@local.gov.uk.

AOB

Caroline Aislabie queried whether a course on divorces was in development. LC confirmed that there isn't at present, but that a discussion on future learning needs would be on the agenda for the next meeting.

Date of next meeting

14 July 2026

Paper 1 – Outline of Survivor Benefit training 2026

Introduction

Including information requirements to process the death of a member, application of LGPS regulations for leavers of the earlier schemes, information on timescales and disclosure.

Death Grants

Including – death of an active, deferred, deferred pensioner, pension credit, pensioner, deferred refund member.

Requirements for paying death grants including discretions, tax limits, interest payments, supplementary pensions increase.

Dealing with AVC plans on the death of a member.

Survivor pensions

Including – death of an active, deferred and deferred pensioner, pensioner member, and cohabiting partner pensions.

Additional details on effect of commutation on survivor benefits, pensions increase, McCloud, treatment of additional contributions paid.

Children's pensions

Including background and eligibility, accrual rates and calculations from different member statuses.

GMP and trivial commutation

How to apply a GMP to a survivor benefit on initial calculation , brief overview of trivial commutation lump sum death benefits.