

North Yorkshire County Council

Pension Board

18 July 2019

Training

1.0 Purpose of the Report

To provide an update on Pension Board member training.

2.0 Background

The Training Policy was adopted by the Pension Board at its inaugural meeting in July 2015. This set out the knowledge and understanding requirements of members of the Pension Board, routes to obtaining training, and training review arrangements.

It states that the suitability of training events and activities should be based on a self-assessment carried out by each Pension Board member. The regulations place the responsibility for making this assessment, and subsequent action to ensure Pension Board members have an appropriate level of knowledge and understanding, on the individual members. In addition, the Pensions Regulator requires that Pension Board members invest time in learning and development.

3.0 Training Activity

Detailed in **Appendix 1** are training events attended and activities undertaken by Pension Board members. Board members are asked to review the training record and advise officers if updates are required.

Pension Board members may wish to discuss the merits of recently undertaken training activity and where appropriate the pros and cons, to inform other Board members of its usefulness.

6.0 Recommendations

- (i) That Members provide an update regarding any Pensions Regulator modules they wish to complete and likely timescales for this.
- (ii) That Members provide details of any training they wish to be included on the training record:
- (iii) That Members should continue to identify any appropriate training needs.

Barry Khan
Assistant Chief Executive (Legal and Democratic Services)
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Northallerton

Background Documents: Pensions Regulator on-line training modules

Pension Board Members - Training, Meetings and Events

Appendix 1

Date	Title or Nature of Course	Sponsor/ Organiser	Venue	David Portlock - Chair	Gordon Gresty	Louise Branford- White	Cllr Mike Jordan	Cllr Ian Cuthbertson	Simon Purcell	David Houlgate	Cllr Anne Hook
06/04/11	Pensions' Meeting	UNISON	Leeds							X	
28/06/11	Pensions' briefing	UNISON	Hull							X	
04/11/11	Pensions' briefing	UNISON	Leeds							X	
12/06/12	Pensions' briefing	UNISON	Leeds							X	
14/06/12	Pensions' briefing to members	UNISON	Harrogate							X	
w/c 02/07/12	Briefing sessions to staff x 4	UNISON	Harrogate							X	
w/c 09/07/12	Briefing sessions to staff x 10	UNISON	Harrogate							X	
30/11/12	Pensions' Roadshow	NYCC	Harrogate							X	
21/11/13	AVC/Pensions' Seminar	Prudential	Harrogate							X	
22/04/14	Special LGSG Meeting	UNISON	Leeds							X	
19/11/14	Pensions' Seminar	UNISON	York							X	
06/15	LGPS Governance	UNISON	Leeds						X		
06/15	LGPS Benefits/Administration	UNISON	Leeds						X		
04/06/15	Training Event for Pension Board Members	LGA	Marriott Hotel, Leeds		X	X	X		X		
03/07/15	Pension Board Member Training	AON	Leeds				X				
17/07/15	Pension Board Member Training	AON	Leeds				X		X		
24/07/15	Pension Board Member Training	AON	Leeds				X				
30/09/15	Pensions' presentation	UNISON	Harrogate							X	
21/10/15	LGPS Trustee Training – Fundamentals XIV	LGA	Leeds		X			X			
17/11/15	LGPS Trustee Training – Fundamentals XIV	LGA	Leeds	X	X			X			
08/12/15	LGPS Trustee Training – Fundamentals XIV	LGA	Leeds	X	X	X	X	X			

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26/06/19	Local Pension Boards Annual Conference	CIFPA & Barnett Waddingham	London	X							
17/09/15	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
26/11/15	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
15/01/16	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
25/02/16	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
19/05/16	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
07/07/16	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
15/09/16	North Yorkshire Pension Fund Committee	NYCC	County Hall	X	X						
24/11/16	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
26/01/17	North Yorkshire Pension Fund Committee	NYCC	County Hall	X		X	X	X			
23/02/17	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
31/03/17	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
25/05/17	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
14/09/17	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
23/11/17	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
22/02/18	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
24/05/18	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
05/07/18	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							

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13/09/18	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
22/11/18	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
21/02/19	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
23/05/19	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
20/06/19	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
25/11/16	North Yorkshire Pension Investment Strategy Workshop	NYPF	County Hall	X							
23/02/17	North Yorkshire Pension Investment Strategy Workshop	NYPF	County Hall	X							
15/09/17	North Yorkshire Pension Investment Strategy Workshop	NYPF	County Hall	X							
17/11/17	North Yorkshire Pension Investment Strategy Workshop	NYPF	County Hall	X							
20/12/17	North Yorkshire Pension Investment Strategy Workshop	NYPF	County Hall	X							
05/07/18	North Yorkshire Pension Investment Strategy Workshop	NYPF	County Hall	X							
14/09/18	North Yorkshire Pension Investment Strategy Workshop	NYPF	County Hall	X							
22/11/18	North Yorkshire Pension Investment Strategy Workshop	NYPF	County Hall	X							
21/02/19	North Yorkshire Pension Investment Strategy Workshop and Fund manager meeting	NYPF	County Hall	X							
24/05/19	North Yorkshire Pension Investment Strategy Workshop	NYPF	County Hall	X							

Date	Title or Nature of Course	Sponsor/ Organiser	Venue	David Portlock - Chair	Gordon Gresty	Louise Branford- White	Cllr Mike Jordan	Cllr Ian Cuthbertson	Simon Purcell	David Houlgate	Cllr Anne Hook
11/11/16	Triennial Valuation Seminar	Actuary	County Hall	X		X					
13/01/17	Pooling – Employers Seminar	NYPF	County Hall	X	X	X					
24/02/17	North Yorkshire Pension Fund Manager Meeting	NYPF	County Hall	X							
03/03/16	Audit Committee Training Session - Counter Fraud	NYCC	County Hall	X			X				
03/02/16	Governance Forum	Mazars	York	X			X	X			
08/07/16	Governance Forum	Mazars	York	X			X	X			
03/02/17	Governance Forum – (Including Cyber Security)	Mazars	York	X			X				
31/01/18	Governance Forum (including GDPR)	Mazars	York	X			X				
18/06/18	Data – Section 13 – Regional Workshop	Mercer	Manchester	X							
21/06/18	Audit Committee Training Session – Treasury Management	NYCC	County Hall	X							
07/15 – 03/17	Introducing Pension Schemes	The Pensions' Regulator – Toolkit Modules	On-line		X			X			
07/15 – 03/17	The Trustees' Role	The Pensions' Regulator – Toolkit Modules	On-line	X	X			X			
07/15 – 03/17	Running a Scheme	The Pensions' Regulator – Toolkit Modules	On-line	X	X						
07/15 – 03/17	Pensions' Law	The Pensions' Regulator – Toolkit Modules	On-line		X						
07/15 – 03/17	An introduction to investment	The Pensions' Regulator – Toolkit Modules	On-Line		X						
07/15 – 01/18	How a DB Scheme works	The Pensions' Regulator – Toolkit Modules	On-line		X				X		