

Pension Board Members - Training, Meetings and Events

Appendix 4

Date	Title or Nature of Course	Sponsor/ Organiser	Venue	David Portlock - Chair	Cllr Steve Watson	Simon Purcell	David Houlgate	Emma Barbery	Sam Thompson	Cllr Martin Rowley BEM	Eddie Brass
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					
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								
17/11/15	LGPS Trustee Training – Fundamentals XIV	LGA	Leeds	X							
08/12/15	LGPS Trustee Training – Fundamentals XIV	LGA	Leeds	X	X						

Date	Title or Nature of Course	Sponsor/ Organiser	Venue	David Portlock - Chair	Cllr Steve Watson	Simon Purcell	David Houlgate	Emma Barbery	Sam Thompson	Cllr Martin Rowley BEM	Eddie Brass
17/10/19	LGPS Trustee Training – Fundamentals	LGA	Leeds			X	X				
14/11/19	LGPS Trustee Training – Fundamentals	LGA	Leeds			X	X				
5/12/19	LGPS Trustee Training – Fundamentals	LGA	Leeds			X	X				
14/01/16	Governance for North Yorkshire Pension Board	Peter Scales – Independent Observer for the North Yorkshire Pension Fund	County Hall	X							
29/06/16	Local Pension Board Conference	CIPFA & Barnett Waddingham	London	X							
24/02/17	LGPS Consultation Meeting	UNISON	Leeds				X				
01/03/17	LGPS Spring Seminar	CIPFA & Barnett Waddingham	Leeds	X							
28/06/17	Local Pension Boards 2 years on	CIPFA & Barnett Waddingham	London	X							
29/06/17 and 30/06/17	Annual LGPS “Trustees” Conference	LGA	Bournemouth	X							
11/09/17 and 12/09/17	Introduction to Pension Funds – New Pension Fund Committee and Pension Board Members	BCPP	York	X							
8/11/18 and 9/11/18	BCPP First Annual Conference	BCPP	Leeds	X							
10/11/17	Local Pension Boards Autumn Seminar	CIPFA	Liverpool								
12/10/18	Local Pension Boards Autumn Seminar	CIPFA & Barnett Waddingham	Liverpool								
27/06/18	Local Pension Boards Annual Conference	CIPFA & Barnett Waddingham	London	X							
05/07/18	Pension Board, Committee and Officer Training –	AON	London			X					

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	Governance and Key Legislation										
13/11/18	Pensions' Course	UNISON	Leeds				X				
11/12/18	UNISON Pensions' Seminar	UNISON	London			X					
25/02/19	Local Pension Boards - Spring Seminar	CIFPA & Barnett Waddingham	Leeds	X							
08/03/19	Regional LGPS Forum	UNISON	Leeds				X				
26/06/19	Local Pension Boards Annual Conference	CIFPA & Barnett Waddingham	London	X							
23 & 24/01/20	LGPS Governance Conference	LGPS	York	X							
17/02/20	Local Pension Boards - Spring Seminar	CIFPA & Barnett Waddingham	Leeds	X			X				
28&29/09/20	Local Pension Boards – Autumn Seminar	CIFPA & Barnett Waddingham	Live interactive webinar	X		X					
28/09/20	AON Responsible Investments webinar	AON	Live interactive webinar	X							
02/10/20	BCPP Annual Conference	BCPP	Live interactive webinar	X							
16-17/11/20	CIPFA Pensions' Conference	CIPFA	Live interactive webinar	X							
19/11/20	Cyber Risk in the LGPS	AON	Live interactive webinar	X		X	X	X			
1/12/20	UNISON LGPS Conference	UNISON	Live interactive webinar				X				
25/1/21	Introduction to the LGPS	NYPF	Live interactive webinar	X			X				

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26/1/21	LGPS Training Seminar – Keeping LGPS connected.	LGA	Live interactive webinar	X							
15/2/21	LGPS – PB Spring Webinar	CIPFA/Barnett Waddingham	Live interactive webinar	X							
25/2/21	Keeping the LGPS connected	Hymans Robertson	Live interactive webinar	X			X Seen on video 7/4/21				
25/3/21	The Pension Regulator's Modular Code and the LGPS	AON	Live interactive webinar	X							
23/6/21	Annual Pension Boards Conference	CIPFA/Barnett Waddingham	Live interactive webinar	X							
30/6/21	The Pension Regulator's Modular Code and the LGPS	AON	Live interactive webinar			X	X				
30/6/21	Audit Committee Treasury Management	NYCC	Live interactive webinar	X							
12/7/21	What is a healthy and well balanced Pension Board	Bright Talk	Live interactive webinar			X					
22/7/21	Cyber Resilience	AON	Live interactive webinar	X							
28/7/21	Getting ready for the Single Code of Practice	AON	Live interactive webinar			X	X				
6/9/21	Understanding investments within the LGPS	BCPP	Live interactive webinar				X				
13/9/21	Pooling and the work of BCPP	BCPP	Live interactive webinar				X				
20/9/21	Introduction to the LGPS – refresher course	UNISON	Live interactive webinar				X				

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21/9/21	Getting the member experience right	AON	Live interactive webinar			X					
22/9/21	GMP conversion with PIE	AON	Live interactive webinar			X					
28/9/21	Local Pension Boards Autumn Update	CIPFA/Barnett Waddingham	Live interactive webinar	X							
30/9/21 & 1/10/21	BCPP Annual Conference	BCPP	BCPP, Leeds	X			X				
6/10/21	Pension Dashboards	AON	Live interactive webinar	X			X		X		
21/10/21	LGPS – Fundamentals Day 1	LGA	Leeds					X	X		
18/11/21	LGPS – Fundamentals Day 2	LGA	Leeds					X			
08/12/21	LGPS – Fundamentals Day 3	LGA	Leeds					X	X		
11/10/24	LGPS – Fundamentals	LGA	Online		X						
10/11/21	Update to Audit Committee Guidance	CIPFA/Barnett Waddingham	Live interactive webinar	X							
10/11/21	AON – UK Pensions Post Pandemic	AON	Live interactive webinar						X		
20&21/1/22	LGPS Governance Conference	LGPS	Live interactive webinar				X	X			
16/2/22	Flexibility of Fiduciary Management	AON	Live interactive webinar				X				
21/3/22	Cyber & Information Security	NYCC (Audit Committee)	On-Line	X							
30/3/22	Good Governance in Local Government - 2022 Update	CIPFA	Live interactive webinar	X							

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27/4/22	Pensions Dashboard Update	AON	Live interactive webinar	X							
17/5/22	Untapped Potential of Internal Audit	CIPFA	Live interactive webinar	X							
6/10/22	Cyber Security	NYCC	County Hall, Northallerton	X		X	X	X	X		
9/2/23	Update for Local Authority Members – Audit Committee	CIPFA	County Hall, Northallerton	X							
9/3/23	Governance update for Local Authorities	CIPFA		X							
18/5/23	Annual Conference/Update for Pension Board members	CIPFA	Birmingham	X							
27/6/23	Pensions' Dashboards	Hymans Robertson	Webinar			X					
31/7/23	Accounting for LGPS pension costs	AON	Webinar			X					
29/11/23	A Shifting Landscape for UK Pensions	AON	Webinar	X							
5/12/23	Updated Ethics Module	Institute of Chartered Accountants in England & Wales	Webinar	X							
5/12/23	Pensions' Dashboards – the European Experience	Hymans Robertson	Webinar			X					
13/9/23	Cost Transparency Roadshow	Scheme Advisory Board	Leeds	X		X					
28-29/9/23	BCPP Investment Conference	BCPP	Leeds	X							
17/1/24	Connection guidance and understanding AVCs and value data		Webinar	X							
18-19 /1/2024	LGPS Governance Conference 2024	LGA	York				X				
23&24/1/24	Good Governance in Local Government	CIPFA	Webinar	X							

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24/1/24	Managing risk in the LGPS - a spotlight on cyber risk	Hymans Robertson	Webinar			X					
29/1/24	TPR's New General Code of Practice	AON	Webinar	X		X	X	X			
7/2/24	Risk Management & Your First Own Risk Assessment	AON	Webinar	X							
13/3/24	Governance Update for Local Authorities	CIPFA	Webinar	X							
30/5/24	Factoring nature into your investment strategy: why, how and what next?	Hymans Robertson	Webinar			X					
14/5/24	Cyber and TPR Requirements	Hymans Robertson	Webinar			X					
3/4/24	Buy-In and de-risking for LGPS funds	AON	Webinar			X					
27/6/24	General Code of Practice Workshop	AON	Webinar	X		X	X	X			
30/9/24	General Code of Practice	Hymans	Webinar			X					
15/11/24	Mansion House Speech	Hymans	Webinar			X					
27/11/24	Climate Change and Longevity	Hymans	Webinar			X					
3/12/24	DB Funding Code	TPR	Webinar			X					
9/12/24	Counter Fraud	Veritau	County Hall								
8/1/25	Gender Pension Gap	Hymans	Webinar	X		X					
15/1/25	TPR – New General Code	AON	Webinar					X			
24/1/25	LGPS Conflicts of Interest	Hymans	Webinar			X					
17/3/25	Role of Audit Committee	Veritau	County Hall	X							
25/3/25	LA Committees Update	CIPFA	Webinar	X							
21/3/25	LGPS and McCloud Remedy	Affinity Connect	Webinar				X				
24/8/21	Module 1 – Hymans On-Line Learning Academy	Hymans	On-Line Learning Package	X		X	X	X	X		
3/11/21	Module 2 – Hymans On-Line Learning Academy	Hymans	On-Line Learning Package	X		X	X	X			

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3/11/21	Module 3 – Hymans On-Line Learning Academy	Hymans	On-Line Learning Package	X		X	X	X			
18/11/21	Module 4 – Hymans On-Line Learning Academy	Hymans	On-Line Learning Package	X		X	X	X			
6/12/21	Module 5 – Hymans On-Line Learning Academy	Hymans	On-Line Learning Package	X		X	X				
6/12/21	Module 6 – Hymans On-Line Learning Academy	Hymans	On-Line Learning Package	X Updated 23/2/23		X Updated 30/3/23	X				
2024	Hymans On-Line Learning Academy – Tranche 2	Hymans	On-Line Learning Package	X		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							
24/11/16	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
26/01/17	North Yorkshire Pension Fund Committee	NYCC	County Hall	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							

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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							
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							
04/07/19	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
13/09/19	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
22/11/19	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
21/02/20	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
10/09/20	North Yorkshire Pension Fund Committee	NYCC	Virtual Meeting	X							
27/11/20	North Yorkshire Pension Fund Committee	NYCC	Virtual Meeting	X							
5/3/21	North Yorkshire Pension Fund Committee	NYCC	Virtual Meeting	X							

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4/6/21	North Yorkshire Pension Fund Committee	NYCC	Virtual Meeting	X							
2/7/21	North Yorkshire Pension Fund Committee	NYCC	Virtual Meeting	X							
10/9/21	North Yorkshire Pension Fund Committee	NYCC	Virtual Meeting	X							
26/11/21	North Yorkshire Pension Fund Committee	NYCC	Virtual Meeting	X							
4/3/22	North Yorkshire Pension Fund Committee	NYCC	Virtual Meeting	X							
27/5/22	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
1/7/22	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
25/11/22	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
3/3/23	North Yorkshire Pension Fund Committee	NYCC	County Hall	X							
26/5/23	North Yorkshire Pension Fund Committee	NYC	County Hall	X							
30/6/23	North Yorkshire Pension Fund Committee	NYC	BCPP Offices, Leeds	X							
15/9/23	North Yorkshire Pension Fund Committee	NYC	County Hall	X	X						
24/11/23	North Yorkshire Pension Fund Committee	NYC	County Hall	X							
1/3/24	North Yorkshire Pension Fund Committee	NYC	County Hall	X							
24/5/24	North Yorkshire Pension Fund Committee	NYC	County Hall	X							
28/6/24	North Yorkshire Pension Fund Committee	NYC	County Hall	X							
13/9/24	North Yorkshire Pension Fund Committee	NYC	County Hall	X							
22/11/24	North Yorkshire Pension Fund Committee	NYC	County Hall	X							

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28/2/25	North Yorkshire Pension Fund Committee	NYC	County Hall	X							
13/9/24	North Yorkshire Pension Fund Committee	NYC	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							
21/11/19	North Yorkshire Pension Investment Strategy Workshop	NYPF	County Hall	X							
20/02/20	North Yorkshire Pension Investment Strategy Workshop	NYPF	County Hall	X							

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10/09/20	North Yorkshire Pension Investment Strategy Workshop	NYPF	Virtual Meeting	X							
26/11/20	North Yorkshire Pension Investment Strategy Workshop	NYPF	Virtual Meeting	X							
28/1/21	North Yorkshire Pension Investment Strategy Workshop	NYPF	Virtual Meeting	X							
12/2/21	North Yorkshire Pension Investment Strategy Workshop	NYPF	Virtual Meeting	X							
4/3/21	North Yorkshire Pension Investment Strategy Workshop	NYPF	Virtual Meeting	X							
13/5/21	North Yorkshire Pension Investment Strategy Workshop	NYPF	Virtual Meeting	X							
3/6/21	North Yorkshire Pension Investment Strategy Workshop	NYPF	Virtual Meeting	X							
2/7/21	North Yorkshire Pension Investment Strategy Workshop	NYPF	Virtual Meeting	X							
25/11/21	Asset Allocation Workshop	NYPF	County Hall	X							
10/2/22	Asset Allocation Workshop	NYPF	Virtual Meeting	X							
3/3/22	Asset Allocation Workshop	NYPF	County Hall	X							
26/5/22	Asset Allocation Workshop	NYPF	County Hall	X							
30/6/22	Asset Allocation Workshop	NYPF	County Hall	X							
24&25/11/22	Asset Allocation/Investment Strategy Workshop	AON	County Hall	X							
20/2/23	Asset Allocation/Investment Strategy Workshop	AON	County Hall	X							
24/5/23	Investment Strategy Workshop	NYPF	County Hall	X							

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30/6/23	Investment Manager Workshop (Border to Coast)	BCPP	County Hall	X							
14/9/23	Asset Allocation Workshop (Equities Review)	NYPF	County Hall	X							
26/10/23	Impact and Factor Equities	NYPF	County Hall	X							
22/2/24	UK Opportunities and Climate Opportunities workshop	NYPF	County Hall	X							
12/9/24	Investment Strategy Workshop	NYPF/AON	County Hall	X							
21/11/24	Investment Strategy Workshop	NYPF	County Hall	X							
27/2/25	Investment Strategy Workshop	NYPF	County Hall	X							
11/11/16	Triennial Valuation Seminar	Actuary	County Hall	X							
22/11/19	Triennial Valuation Seminar (as part of the Pension Fund Committee meeting)	Actuary	County Hall	X							
13/01/17	Pooling – Employers Seminar	NYPF	County Hall	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							
03/02/16	Governance Forum	Mazars	York	X							
08/07/16	Governance Forum	Mazars	York	X							
03/02/17	Governance Forum – (Including Cyber Security)	Mazars	York	X							
31/01/18	Governance Forum (including GDPR)	Mazars	York	X							
18/06/18	Data – Section 13 – Regional Workshop	Mercer	Manchester	X							

