

# North Yorkshire Council

## Pension Board

2 April 2026

### Training

#### 1.0 Purpose of the report

1.1 To provide an update on Pension Board member training.

#### 2.0 Background

2.1 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.

2.2 The Policy 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

3.1 It was previously agreed that, where possible, some training events would be provided immediately prior to the commencement of scheduled meetings of the Board. Arrangements for this training will be made when appropriate.

3.2 Following discussions related to the development of training at both the Board and Pension Fund Committee, the provision of a package of online training sessions has been obtained from a third-party provider, with Hymans Robertson. A Version 2 of the package is now in place and Members will be given advice as to how to access this. It should be noted that Version 2 supersedes the original package, and requires Members to complete the package, whether or not they completed Version 1. Members are encouraged to take part in these sessions.

3.3 At the 15 January 2026, the results of the knowledge assessment survey were noted by Board Members and it was felt that these generally demonstrated a high level of knowledge across the Board.

3.4 Details of training events attended and activities undertaken by Pension Board members are contained in a training record report that is now published with the Annual Report and is no longer circulated with the papers. Board members are asked to advise officers if they have undertaken any training.

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

3.6 It is recognised that Members of the Board have constraints on their time and may have difficulty in undertaking the necessary training in view of this. Members agreed, therefore, that Board meetings should allow time for Members to undertake training, either individually or collectively.

#### **4.0 Recommendations**

- (i) That Members note the content of the report.
- (ii) That Members provide details of any training they wish to be included on their training record.
- (iii) That Members provide details of any issues relevant to the Pension Board, that could be the subject of future training sessions.

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