Learning needs analysis of governance and administration requirements

Step 1 – Plan your learning

Learning needs analysis		Personal development			
1 – My role, responsibilities and duties as a pension board member					
Do I know...?	**Rate my skills** 1 – no knowledge 5 – highly skilled	**My objectives**	**Timescale**	**What learning am I planning to do?**	**Where to find information**
Who the Pensions Regulator is What my role, responsibilities and duties are How the regulator's code of practice will support me in assisting the scheme manager with running an effective and efficient scheme	**1 2 3 4 5** **1 2 3 4 5** **1 2 3 4 5**				Introduction to public service pension schemes: www.tpr.gov.uk/PS-introduction
2 – The knowledge and understanding I need as a pension board member					
Do I know...?	**Rate my skills**	**My objectives**	**Timescale**	**What learning am I planning to do?**	**Where to find information**
What I need to know about my scheme as a pension board member What I need to know about pensions law as a pension board member How to plan, follow and record my training, knowledge and understanding	**1 2 3 4 5** **1 2 3 4 5** **1 2 3 4 5**				Knowledge and understanding duty on pension board members: www.tpr.gov.uk/PS-knowledge

3 – Conflicts of interest

Do I know...?	Rate my skills	My objectives	Timescale	What learning am I planning to do?	Where to find information
What information I need to provide to the scheme manager How to disclose potential or actual conflicts of interest How to monitor and discuss the risk of potential or actual conflicts of interest	1 2 3 4 5 1 2 3 4 5 1 2 3 4 5				'Conflicts of interest' course in the Public Service toolkit: www.pensionseducationportal.com

4 – Publishing scheme information

Do I know...?	Rate my skills	My objectives	Timescale	What learning am I planning to do?	Where to find information
What information needs to be published about the pension board How that information is to be recorded and published What the pension board's role is regarding the publication of that information	1 2 3 4 5 1 2 3 4 5 1 2 3 4 5				Publishing scheme information: www.tpr.gov.uk/PS-publishing

5 – Risk management and internal controls

Do I know...?	Rate my skills	My objectives	Timescale	What learning am I planning to do?	Where to find information
How risks will be identified and assessed How internal controls will be set up How risk assessments will be documented How possible fraudulent activity will be	1 2 3 4 5 1 2 3 4 5 1 2 3 4 5 1 2 3 4 5				'Managing risk and internal controls' course in the Public Service toolkit: www.pensionseducationportal.com

identified and dealt with					
Who is involved in internal controls and risk management and their role	**1 2 3 4 5**				
What the pension board's role is in internal controls and risk management	**1 2 3 4 5**				

6 – Record-keeping

Do I know...?	Rate my skills	My objectives	Timescale	What learning am I planning to do?	Where to find information
How an effective scheme record-keeping process will be set up	**1 2 3 4 5**				'Maintaining accurate member data' course in the Public Service toolkit: www.pensionseducationportal.com
How the required records of scheme members' data, transactions and pension board decisions will be kept	**1 2 3 4 5**				
Who is involved in record-keeping and their role	**1 2 3 4 5**				
What the pension board's role is in record-keeping	**1 2 3 4 5**				

7 – Maintaining contributions

Do I know...?	Rate my skills	My objectives	Timescale	What learning am I planning to do?	Where to find information
How employer and employee payment contributions will be monitored and recorded	**1 2 3 4 5**				'Maintaining member contributions' course in the Public Service toolkit: www.pensionseducationportal.com
How late or failed payments which are likely to be of material significance to the regulator will be reported to the regulator	**1 2 3 4 5**				
What the pension board's role is in maintaining contributions and notifying the	**1 2 3 4 5**				

regulator of late or failed payments					

8 – Communicating with members

Do I know...?	Rate my skills	My objectives	Timescale	What learning am I planning to do?	Where to find information
What information must be provided to members about the administration of the scheme and their benefits	1 2 3 4 5				'Providing information to members and others' course in the Public Service toolkit: www.pensionseducationportal.com
How that information will be provided to members	1 2 3 4 5				
Who is involved in member communications	1 2 3 4 5				
What the pension board's role is in member communications	1 2 3 4 5				

9 – Resolving disputes

Do I know...?	Rate my skills	My objectives	Timescale	What learning am I planning to do?	Where to find information
How disputes within my scheme will be resolved	1 2 3 4 5				'Resolving internal disputes' course in the Public Service toolkit: www.pensionseducationportal.com
How disputes within my scheme and their resolutions will be documented	1 2 3 4 5				
What the pension board's role is in the resolution of issues and disputes	1 2 3 4 5				

10 – Reporting breaches of the law

Do I know...?	Rate my skills	My objectives	Timescale	What learning am I planning to do?	Where to find information
How to identify breaches of the law	1 2 3 4 5				'Reporting breaches of the law' course in the Public Service toolkit: www.pensionseducationportal.com
How breaches of the law will be assessed	1 2 3 4 5				
How breaches of the law likely to be of material significance to the regulator will be reported	1 2 3 4 5				
What my responsibility is to report breaches	1 2 3 4 5				
Who else is under a duty to report breaches	1 2 3 4 5				

11 – Scheme Rules

Do I know...?	Rate my skills	My objectives	Timescale	What learning am I planning to do?	Where to find information
Where to access scheme rules and regulations	1 2 3 4 5				To be decided on most suitable place to store information
Which discretions employers of the fund have	1 2 3 4 5				
What discretionary policies are held for each employer	1 2 3 4 5				
What discretions the Administering Authority has	1 2 3 4 5				

12 – Scheme Documentation					
Do I know where to access the latest...?	**Rate my skills**	**My objectives**	**Timescale**	**What learning am I planning to do?**	**Where to find information**
Annual Report Valuation report Funding Strategy Governance Statement Statement of Investment Principles	**1 2 3 4 5** **1 2 3 4 5** **1 2 3 4 5** **1 2 3 4 5** **1 2 3 4 5**				www.teespen.org.uk

Step 2 – Complete the learning					
Monthly study plan					
	Monday	**Tuesday**	**Wednesday**	**Thursday**	**Friday**	**Weekend**
Week 1					
Week 2					
Week 3					
Week 4					

Step 3 – Record the learning	Step 4 – Reflect on the learning Event review		
What did I do? Course/event/activity Date, location and provider Learning objectives Content summary/programme Any qualification/mark I achieved	**How did it go?** What happened? Have I learnt what I hoped to learn from my training?	**How have my knowledge, skills and mindsets been improved?** What have I actually gained from this event? What do I know at the end of this event that I didn't know at the beginning? How have I benefited from the experience?	**How will I be able to bring what I have learned into my work?** How will the organisation benefit? Any feedback received – what do other people say [scheme manager, peers, etc]?

Step 4 – Reflect on the learning			
Periodic review			
Review Have I achieved my development plan for this period? Have I completed the training I identified?	**The positives** What type of development has delivered the greatest benefit? What and why was this?	**The negatives** What type of development has delivered the least benefit? What went wrong? How can I ensure this does not happen next time?	**Next steps** What development needs do I still feel I have? What are my priorities and deadlines for future development? What should I look to include in my next development planning cycle?