Public service pension schemes: Learning needs analysis of certain 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**
What The role of 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	**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:

How possible fraudulent activity will be identified and dealt with Who is involved in internal controls and risk management and their role What the pension board's role is in internal controls and risk management	**1 2 3 4 5** **1 2 3 4 5** **1 2 3 4 5**				www.pensionseducationportal.com
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 How the required records of scheme members' data, transactions and pension board decisions will be kept Who is involved in record-keeping and their role What the pension board's role is in record-keeping	**1 2 3 4 5** **1 2 3 4 5** **1 2 3 4 5** **1 2 3 4 5**				'Maintaining accurate member data' course in the Public Service toolkit: www.pensionseducationportal.com
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 How late or failed payments which are likely to be of material significance to the regulator will be reported to the regulator What the pension board's role is in	**1 2 3 4 5** **1 2 3 4 5** **1 2 3 4 5**				'Maintaining member contributions' course in the Public Service toolkit: www.pensionseducationportal.com

maintaining contributions and notifying the 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 How that information will be provided to members Who is involved in member communications What the pension board's role is in member communications	**1 2 3 4 5** **1 2 3 4 5** **1 2 3 4 5** **1 2 3 4 5**				'Providing information to members and others' course in the Public Service toolkit: www.pensionseducationportal.com
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 How disputes within my scheme and their resolutions will be documented What the pension board's role is in the resolution of issues and disputes	**1 2 3 4 5** **1 2 3 4 5** **1 2 3 4 5**				'Resolving internal disputes' course in the Public Service toolkit: www.pensionseducationportal.com
10 – Reporting breaches of the law					
Do I know...?	**Rate my skills**	**My objectives**	**Timescale**	**What learning**	**Where to find information**

				am I planning to do?	
How to identify breaches of the law How breaches of the law will be assessed How breaches of the law likely to be of material significance to the regulator will be reported What my responsibility is to report breaches Who else is under a duty to report breaches	**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**				'Reporting breaches of the law' course in the Public Service toolkit: www.pensionseducationportal.com

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?