

APPENDIX 8 – Learning Needs Analysis Template

| 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 |
| Who The Pensions Regulator is | 1 2 3 4 5 | | | | Introduction to public service pension schemes: www.tpr.gov.uk/PS-introduction |
| What my role, responsibilities and duties are | 1 2 3 4 5 | | | | |
| 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 | | | | |
| 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 | 1 2 3 4 5 | | | | Knowledge and understanding duty on Pension Board members: www.tpr.gov.uk/PS-knowledge |
| What I need to know about pensions law as a Pension Board member | 1 2 3 4 5 | | | | |
| How to plan, follow and record my training, knowledge and understanding | 1 2 3 4 5 | | | | |

| 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 | 1 2 3 4 5 | | | | 'Conflicts of interest' course in the Public Service toolkit: www.pensionseducationportal.com |
| How to disclose potential or actual conflicts of interest | 1 2 3 4 5 | | | | |
| How to monitor and discuss the risk of potential or actual conflicts of interest | 1 2 3 4 5 | | | | |
| 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 | 1 2 3 4 5 | | | | Publishing scheme information: www.tpr.gov.uk/PS-publishing |
| How that information is to be recorded and published | 1 2 3 4 5 | | | | |
| What the Pension Board's role is regarding the publication of that information | 1 2 3 4 5 | | | | |
| 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 | 1 2 3 4 5 | | | | 'Managing risk and internal controls' course in the Public Service toolkit: www.pensionseducationportal.com |
| How internal controls will be set up | 1 2 3 4 5 | | | | |
| How risk assessments will be documented | 1 2 3 4 5 | | | | |
| How possible fraudulent activity will be identified and dealt with | 1 2 3 4 5 | | | | |
| 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 Regulator of late or failed payments | 1 2 3 4 5 | | | | |
| 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 | | | | |