

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				