

SYPA Members Learning and Development Questionnaire

Introduction

This questionnaire is designed to help you, and the South Yorkshire Joint Secretariat identify what information and training you may need to fulfil your role as a Pension's Authority Member.

The recent work on producing a Role Description for Pension's Authority Members highlighted that in many ways this role differs from other roles you may undertake as a local councillor. Members act as Trustees with an overriding responsibility to act in the best interests of the beneficiaries, even if this is sometimes at odds with their political roles and responsibilities.

Furthermore pension fund management is complex, and whilst Members are not expected to be professional experts in investment matters, a certain amount of technical knowledge and understanding is required to enable you to make informed judgements and decisions.

Completing the questionnaire

You should allow 30-45 minutes to complete this. However you may prefer to do this through a one to one discussion.

Please try to be honest, so we can provide the right briefings and training for you in future. Even if you are an experienced Member of the SYPA there are still likely to be some gaps, or areas you want to progress in.

What next?

We ask that you complete and return the questionnaire either via e-mail to rbywater@syjs.gov.uk or in the pre-paid envelope provided, by 31 August 2012

Following this a detailed analysis of the returned questionnaires will take place. Any gaps or areas for improvement identified within the Knowledge and Understanding section will be used to help develop the Authority's training and development strategy. It is hoped that any gaps or areas for improvement within the Skills section can be discussed with District Councils' Member training services, to identify the best method of providing training/development in those areas.

PERSONAL PROFILE

Name	
District Authority	
How long have you been a councillor?	
What are your other councillor responsibilities/roles?	
Other relevant experience in professional, business or community roles?	

What IT facilities and skills do you have? (e.g. internet access, use of email, Word and Excel software?)	
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KNOWLEDGE AND UNDERSTANDING

Please indicate the level you think you are at using the scale below as a guide, and where appropriate use the comments column to indicate specific areas of knowledge you would like to build up (NB this could apply at any level, including level 4).

Scale

- 1 Unfamiliar/new to you
- 2 Some knowledge but partial/limited
- 3 Reasonably good level of knowledge and understanding
- 4 Confident, with an in-depth knowledge and understanding

Knowledge and understanding	Level	Comments
Background and who is who		
The legal framework and design of the Local Government Pension Scheme		

The role and responsibilities of the Authority or as "quasi trustee"		
The role and responsibilities of SYPA Members		
Corporate governance and the Myners recommendations for pension fund trustees		
The roles and responsibilities of the Clerk & Treasurer, Head of Pensions Administration and the Fund Director		
Role of the South Yorkshire Joint Secretariat (SYJS)		
Role of Actuary		
The whole range of SYPA stakeholders (e.g. individual scheme members, local authority employers, other employers/admitted bodies and trade unions), and their different perspectives and needs		
Role of the Financial Services Authority (FSA)		

Technical understanding		
Asset classes and asset allocation		
Valuations and valuation monitoring		
Investment principles and management strategies		
Risk analysis		
Setting performance benchmarks		
Funding strategies and monitoring		

Skills

Many of these skills apply to being an effective Member generally, although being able to analyse information, think longer term and make objective decisions are particularly important on the SYPA. Communicating and influence too are important to build and maintain the right links with your authority and the other employers.

Again use the scale suggested below, and make good use of the comments column to tell us about specific issues for you.

- 1 Not very confident and /or inexperienced
- 2 Reasonably confident and/or experienced
- 3 Very confident and/or experienced

Skill	Level	Comments
Understanding and handling numerical and financial information		
Digesting written and oral information and grasping key issues		
Using and monitoring performance management information –e.g. benchmarks		
Thinking about the bigger picture (nationally and locally) and the longer term (10 years) issues for the SYPA		

Being clear about the top level Authority objectives and its priorities		
Making sure you get, and weigh up, the right advice		
Being decisive, based on an objective assessment of all the issues and risks		
Being able to ask pertinent questions and to challenge officers and advisers constructively		
Take the initiative to communicate with Members, officers, employers, unions etc.		
Keeping yourself up to date		

Your preferences

Everyone has preferred ways of taking in new information and developing skills. It would help us provide you with the right support if you could indicate your preferences. – please tick all those that apply to you:

Reading – briefing papers, reports and periodicals	
Electronically through email and website access	

One to one briefings and discussions	
Talks and verbal presentations	
Workshops and seminars	
Large conferences	

THANK YOU FOR COMPLETING THIS QUESTIONNAIRE
