

# **MEMBER LEARNING AND DEVELOPMENT**

## **QUESTIONNAIRE**



SOUTH YORKSHIRE  
PENSIONS AUTHORITY

### **1. Introduction**

This questionnaire is designed to help you to identify the knowledge, support and skills you may need to fulfil your role as a Pensions Authority Member.

The role of a Pensions Authority Member differs from other roles you may carry out 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.

### **2. Completing the Questionnaire**

There are several ways you can complete this questionnaire:

- ✦ Filling in a printed copy and sending it back to the Joint Authorities Governance Unit, BMBC (*details below*).
- ✦ By email – we will send you a copy of the form to fill in and return by email – see contact details below.
- ✦ Face-to-face with an officer from the Joint Authorities Governance Unit, BMBC at a date / time / location to suit you.
- ✦ Via telephone.

The process should take no longer than 30-45 minutes.

Please try and be as honest as you can in your assessment / discussion. Even if you are an experienced Member of the Pensions Authority, you may still find there are some areas you may wish to learn more about, or would benefit from additional development or support.

### **3. What happens next?**

All completed Development Discussion questionnaires will be read and analysed to produce a comprehensive Learning and Development Schedule for the municipal year. This will consist of joint and individual learning and development either specific to the Pensions Authority, or more generic learning with other Joint Authorities or South Yorkshire Districts.

Members can also request learning and development at any time throughout the year – which will be assessed against the criteria in the Learning and Development Strategy to ensure fairness and value-for-money.

Additionally, there will be the externally-provided Fundamentals Training, which is the bespoke Local Government Pension Scheme (LGPS) training held over three days (not necessarily consecutive) and aimed specifically at Pensions Authority Members.

N.B. All new Members are expected to complete the 3 day training as a minimum requirement and any existing Members who have not yet completed the 3 day course

For Members who would like a refresh of the Fundamentals training, and following the success of the pilot last year, a one day overview of the three days is included in the draft learning and development strategy – date to be confirmed.

#### 4. The Questionnaire

PERSONAL PROFILE	
<b>Name</b>	
<b>District Authority</b>	
<b>How long have you been a Member of the Pensions Authority?</b>	
<b>What are your other (main) elected Member responsibilities / roles?</b>	
<b>Other relevant experience, e.g. professional, business, community</b>	
<b>What IT facilities and skills do you have?, e.g. e-mail, diary management, internet, Twitter, social media etc.</b>	

KNOWLEDGE AND UNDERSTANDING		
<p>Please indicate – as honestly as you can – the level you think you are at using the scale below as a guide. Where appropriate, please use the ‘Comments’ column to indicate specific areas of knowledge where you would like additional knowledge, development or support.</p> <p><b>Level</b>            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</p>		
Knowledge & Understanding	Level	Comments
The legal framework and design of the Local Government Pension Scheme (LGPS)		
The role and responsibilities of the Authority or as ‘quasi trustee’		
The role and responsibilities of the Pensions Authority Members		
Corporate governance and the Myners Principles for Pension Fund Trustees		
The roles and responsibilities of the Clerk and the Treasurer, Head of Pensions Administration and the Fund Director		

Role of the South Yorkshire Joint Secretariat (SYJS)		
Role of Actuary		
The whole range of SY Pensions Authority stakeholders (e.g. individual scheme members, local authority employers, other employers / admitted bodies and trade unions), and their different perspectives / needs		
Role of the Financial Conduct Authority (FSA)		
Asset classes and asset allocation		
Valuations and valuation monitoring		
Investment principles and management strategies		
Risk Analysis		
Setting performance benchmarks		
Funding strategies and monitoring		
<b>SKILLS</b>		
<p>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 to your role as a Pensions Authority Member, communicating and influencing are also important to build and maintain the right links with your own Authority and the other employers.</p> <p>Again, use the levels suggested below, and make use of the 'Comments' column to tell us about any specific issues.</p> <p><b>Level</b>  1 - Not very confident and / or inexperienced.  2 - Reasonably confident and / or experienced.  3. – Very confident and / or experienced.</p>		
<b>Skill</b>	<b>Level</b>	<b>Comments</b>
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 Pensions Authority		
Being clear about the top level Authority objectives and its priorities		

Making sure you receive independent and informed advice and guidance that is understandable		
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 (overview and scrutiny)		
The ability to take the initiative to communicate with Members, officers, employers, unions etc.		
Keeping yourself up-to-date with issues pertinent to the Pensions Authority		

**5. Your preferences**

Everyone has preferred ways of learning and developing new skills. If you could indicate your preferences below this will help us to provide the right support tailored to your needs (where practicable). **Please tick all that apply.**

Reading – briefing papers, reports and periodicals	
Electronically through e-mail and website access	
One-to-one briefings and discussions	
Talks and verbal presentations	
Workshops and Seminars	
Conferences	

**THANK YOU FOR COMPLETING THIS QUESTIONNAIRE**

Please return completed form to:  
 Gill Garrety  
 Member Services Officer  
 SY Joint Governance Unit, BMBC  
 18 Regent Street  
 Barnsley  
 S70 2HG  
 Email: [ggarrety@syjs.gov.uk](mailto:ggarrety@syjs.gov.uk)  
 Tel: 01226 772806