Knowledge, Experience and Skills Assessment

This self-assessment is designed to record your skills, knowledge, understanding and experience. This will be discussed with you individually in order to inform individal member learning and development plans that will be tailored to your training needs to equip you with the knowledge and skills required to carry out your roles effectively as members of the Authority and Local Pension Board.

Name:	Assessment Date:

Core Knowledge	NKA Score	Comments
Fully Conversant in the 8 core techincal areas (CIPFA) has identified:		
Committee Role and Pensions Legislation	x%	
Pensions Governance	x%	
Pensions Administration	x%	
Pensions Accounting and Auditing Standards	x%	
Procurement and Relationship Management	x%	
Investment Performance and Risk Management	x%	
Financial Markets and Product Knowledge	x%	
Actuarial Methods, Standards and Practices	x%	

Select the level to which you agree with the following statements:

Knowledge and Understanding	Self-Assessment	Comments
I ensure my knowledge is kept up to date		
I have an understanding of the pensions and LGPS regulatory framework (legislation in the UK England and Wales) and how it applies to the Fund		
I am aware of the Myners principles of investment governance and the Stewardship Code		
I am aware of TPR's General Code of Practice and how this applies to the Fund		
I have a good understanding of the roles and responsiblities of Authority Members and all those involved in running the Fund		
I have a working knowledge of the relationship and purpose of the Local Pension Board to support the Authority		

Tick the box against any of the following areas of experience that you possess:

Experience	Tick box:	Comments
Relevant experience of sitting on governance boards		
Strategy development experience		
Pension industry experience		
Pension administration experience		
Financial Management experience		
Investment experience		
Legal experience		
Communication/Marketing/Media experience		
Experience of prioritising, assessment and mitigating risk		
Other - Please Specify		

Select the level to which you demonstrate the following:

Behaviours	Self-Assessment	Comments
Demonstrates consistent attendance at meetings		
Always prepared for meetings. Reads Authority / LPB papers in advance and is prepared to engage and ask questions		
Able to work effectively with other members of varying experience and understanding		
Works collaboratively and establishes good working relationships		
Questions and challenges, when necessary to further understanding and develop problem-solving		
Approaches matters with an open and independent mind, avoiding any pre-determination or bias		
Undertakes learning and development to improve member skills and is aware of own strengths and areas for development		
Understands and is committed to the objectives of the Fund		
Acts with openess, honesty, transparency, and integrity and manages personal conflicts of interest		

Select the most appropriate rating for each of these skills		
Skills	**Self-Assessment**	**Comments**
Strategic thinking skills		
Able to absorb and analyse large quantities of information		
Able to engage in rich discussion and debate		
Able to demonstrate influence and consensus building skills		
Demonstrates active listening skills		
Able to scrutinse and seek assurance through probing		

This Learning and Development Plan will help you record the skills, knowledge, understanding and experience. It is not intended to be an appraisal and you should consider, the skills you feel are required to further enhance your development and expertise. Please ensure to log all training and development undertaken in the last year.
Members are encouraged to note any formal / informal training they wish to attend to increase their knowledge and skills.

Name:		Review Date:	

Member Learning and Development Plan

Meeting Attendance

Authority	LPB	A&G	Staffing Committee	Appointment and Appeals Committee
%	%	%	%	%

Training Attendance

Authority	LPB	A&G		
%	%	%		

Record of training and L&D activity undertaken in 2024/25 (internal and external)

Date of Training	Course Attended	Training Provider	Comments
			Please evaluate and note anything learnt that you have incorporated into your member role

Assessment against Skills Matrix

Agreed summary of overall assessment :

XXXXXX

Training Needs Identified:

Agreed summary of training needs identified from discussion of the knowledge and skills matrix:

XXXXXX

Training and L&D Plan 2025/26:

Date of Training	Course / Conference / Event or other L&D activity identified	Training Provider	Comments
			Please note the reason for completion of identified training

Member's comments:

Please note your overall comments on training and development completed during the current year and the plan identified for the coming year.

XXXXXX

Signed:		Date:	