

Appendix 2

Training Evaluation Form

Title of event: Pensions Admin & Investment Training

Date of event: 18th September 2018

Location of event: Lakeview Room, County Hall, Worcestershire

Trainers:

Instructions: Please tick your level of agreement with the statements listed below	Strongly Agree	Agree	Disagree	Strongly Disagree	Not relevant to this event
1. The objectives of the training were met	2	6		1	
2. The presenters were engaging	2	7			
3. The presentation materials were relevant	4	5			
4. The content of the course was organised and easy to follow	4	5			
5. The trainers were well prepared and able to answer any questions	4	5			
6. The course length was appropriate	3	6			
7. The pace of the course was appropriate to the content and attendees	3	6			
8. The exercises/role play were helpful and relevant	N/A	N/A	N/A	N/A	N/A
9. The venue was appropriate for the event	4	4		1	

10. What was most useful?

- UBS Presentation on Portfolio and risk management and asset allocation
- Comparison to other funds and history from Philip
- USB presentation on asset types was very informative and also guaranteed minimum pensions was very good
- For me the later items in general
- Agenda items 2,3 and 6 were difficult to assess and wanted a better understanding, but found it difficult to grasp (see below)
- Liability section
- All of it
- Discussion about covenants
- LGPS presentation

11. What was least useful?

- Pensions Admin was too lengthy
- Investment pooling was too detailed and graveyard shift
- 6 – only because it was difficult to grasp and do not come from a financial background
- None of it
- Explanation of equities and gilts, but fully understand why covered
- Admin authority lifecycle

12. What else would you like to see included in this event? Are there any other topics that you would like to be offered training courses in?

- Actuarial assumptions
- Options to keep fund near to 100% funded
- How we compare to other funds on assumptions / percentage of fund valued. Are we to risk averse or opposite in comparison
- Seems very comprehensive
- Risk v reward
- Use of Infrastructure funds
- Simple explanation of GMP and implications for fund and members

13. Would you recommend this course to colleagues? Yes/No Why?

- Informative & Helpful
- Very useful
- Possibly but dependent on their role and interest
- Yes good coverage of important aspects of pensions
- It covered all key points

14. Any other comments?

- Good overall presentations to provide introduction to provide an induction to pension's admin. Good mix of speakers – variety made it enjoyable. LGPS Central and UBS presentations were particularly interesting.
- Constructive and helpful afternoon