Worcestershire Pension Fund Training Plan   February 2023

This Training Plan summarises the training work that we plan to progress in 2023 /2024.

It is very much a work in progress, as our newly appointed Training Officer is not able to spend much time on training until we have backfilled her existing duties with the new recruits that we have appointed as part of the restructure of pensions administration.

Training of our elected members

We plan to conduct a further (the last one was conducted in October 2021) Training Needs Analysis to inform our training programme for elected members.

Meantime all new elected members will be provided with an induction to the Board / Committee, be asked to suggest areas that they would welcome training on at the end of each training session and will be made aware of the LGA's training programme.

Training of our employers

We plan to survey employers on what they think about the material in the Employers area of our website and more widely about what matters to them / our training / processes / service.

On 15 March we are running a Pension Overview session for WCC and WCC Schools HR teams.

Training of pensions administration staff

We plan to use our Pensions Administration Skills Matrix to highlight the progress being made in delivering resilience in pensions administration by identifying knowledge and knowledge gaps for our staff.

We plan to support our existing staff who have been promoted into new roles within our new pensions administration structure by mentoring them and delegating activities more than we have historically. A buddy system along the lines of the following would form the basis of this:

- A new Pension Business Support learning from an experienced Pension Business Support

- An experienced Pension Business Support (at least 50% competency rating) learning an area from an experienced Pensions Assistant – learning the process but eventually taking an element of this work i.e. part of their alphabet split once they are feeling confident to start processes on their own with their buddy reviewing (25% and above on the skills matrix competency)

- A Pensions Assistant learning an area, reflective of what they are doing with the Pension Business Support, from an experienced Pensions Officer. Again once they are at 50% competency, the Pensions Officer could start to move to working with the Senior Pensions Officer

- A Senior Pensions Officer working with their manager to improve their knowledge and development using the time 'gained' from the support received from the

Pensions Officer. This could, for example, be around LTA / AA or on 121s or on staff development plans or on / monitoring annual objectives being progressed

- Managers working on specific aspects of the Head of Pensions Administration work to support development and resilience in this area. An example might be working on the pensions administration system or legal services procurements alongside the Head of Pensions Administration

- For example:
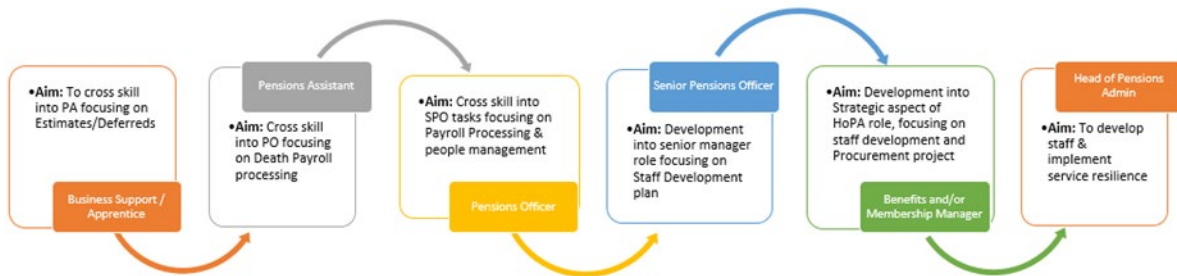
We plan to encourage personal development by supporting study for professional qualifications, by encouraging attendance at online seminars or user groups.

We plan to use using monthly 121s to encourage staff to take full ownership of their activities, to flesh out the areas that staff would be interested in gaining experience in, and to identify any areas that staff need further support on.

Specific initiatives that we plan to progress include:

- Building a bespoke apprentice programme for our new Business Support Officer recruits
- Building a bespoke induction programme for our new recruits
- Enhancing the existing training notes for our staff working on processing new members of the Fund
- Enhancing the existing training notes for our staff working on processing transfers
- Enhancing the existing training notes for our staff working on processing employee members who become deferred
- Enhancing the existing training notes for our staff working on processing aggregations of LGPS service
- Enhancing the existing training notes for our staff working on processing employers' CARE returns
- Enhancing the existing training notes for our staff working on processing the year end employer returns
- Producing bespoke training for new projects like Member Self Service or Pensions Dashboards or delivering the McCloud remedy
- Producing bespoke training for any future upgrades to our pensions administration system

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