Attendance at Essential Training Sessions CIPFA Knowledge and Skills Framework Modules

Subject Heading	Sub- Heading	Topics	Clir Alan Diskin (Chair)	Cllr Hadyn Bateman (Vice Chair)	CIIr Brian Dunn	Cllr Ron Hampson	CIIr Matt Wright	Clir Huw Li. Jones (DCBC)	Clir Steve Wilson (WCBC)	Clir Andy Rutherford (Rhyl TC)	Steve Hibbert (Member	CIIr Nigel Steele- Mortimor	Cllr George Hardcastle (Sub)	Helen Stappleton (CO P&R)	Gary Ferguson (S151)	Phil Latham	Debbie Fielder	Alwyn Hughes	Helen Bernham
	General pensions framework	A general awareness of the pensions legislative framework in the UK.		05/06/2014	05/06/2014	05/06/2014			05/06/2014		05/06/2014			05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014
Pensions legislative and governance context	Scheme- specific legislation	An overall understanding of the legislation specific to the scheme and the main features relating to benefits, administration and investment.		05/06/2014	05/06/2014	05/06/2014			05/06/2014		05/06/2014			05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014
Pensions legislative a	Scheme- specific legislation	An awareness of the Local Government Pension Scheme (Benefits, Membership and Contributions) Regulations 2007 and Local Government Pension Scheme (Administration) Regulations 2008 and their main features.		05/06/2014	05/06/2014	05/06/2014			05/06/2014		05/06/2014			05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014

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	Scheme- specific legislation	An appreciation of LGPS discretions and how the formulation of the discretionary policies impacts on the pension fund, employers and local taxpayers.		05/06/2014	05/06/2014	05/06/2014			05/06/2014		05/06/2014			05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014
	Scheme- specific legislation	A regularly updated appreciation of the latest changes to the scheme rules.		05/06/2014	05/06/2014	05/06/2014			05/06/2014		05/06/2014			05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014
	Scheme- specific legislation	Knowledge of the role of the administering authority in relation to the LGPS.		05/06/2014	05/06/2014	05/06/2014			05/06/2014		05/06/2014			05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014
	Pensions regulators and advisors	An understanding of how the roles and powers of the Pensions Regulator, the Pensions Advisory Service and the Pensions Ombudsman relate to the workings of the scheme.		05/06/2014	05/06/2014	05/06/2014			05/06/2014		05/06/2014			05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014
	General constitutional framework	Broad understanding of the role of pension fund committees in relation to the fund, administering authority, employing authorities, scheme members and taxpayers.		05/06/2014	05/06/2014	05/06/2014			05/06/2014		05/06/2014			05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014

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	General constitutional framework	Awareness of the role and statutory responsibilities of the treasurer and monitoring officer.		05/06/2014	05/06/2014	05/06/2014			05/06/2014		05/06/2014			05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014
	General constitut-ional framework	Knowledge of consultation, communication and involvement options relevant to the stakeholders.		05/06/2014	05/06/2014	05/06/2014			05/06/2014		05/06/2014			05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014
	Pension scheme governance	An awareness of the LGPS main features.		05/06/2014	05/06/2014	05/06/2014			05/06/2014		05/06/2014			05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014
	Pension scheme governance	Knowledge of the Myners principles and associated CIPFA and SOLACE guidance.		05/06/2014	05/06/2014	05/06/2014			05/06/2014		05/06/2014			05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014
	Pension scheme governance	A detailed knowledge of the duties and responsibilities of committee members.		05/06/2014	05/06/2014	05/06/2014			05/06/2014		05/06/2014			05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014
	Pension scheme governance	Knowledge of the stakeholders of the pension fund and the nature of their interests.		05/06/2014	05/06/2014	05/06/2014			05/06/2014		05/06/2014			05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014	05/06/2014

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Pensions accounting and auditing standards		Awareness of the Accounts and Audit Regulations and legislative requirements relating to the role of the committee and individual members in considering and signing off the accounts and annual report.		03/07/2014		03/07/2014			03/07/2014							03/07/2014	03/07/2014	03/07/2014	03/07/2014
Pensions acco		Awareness of the role of both internal and external audit in the governance and assurance process.		03/07/2014		03/07/2014			03/07/2014							03/07/2014	03/07/2014	03/07/2014	03/07/2014
Financial services procurement and relationship management	Understand- ing public procurement	Understanding of the background to current public procurement policy and procedures, and of the values and scope of public procurement and the roles of key decision makers and organisations.		03/07/2014	28/08/2014	03/07/2014	03/07/2014		03/07/2014	28/08/2014	28/08/2014			07/08/2014	07/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014
Financial service	Understand- ing public procurement	A general understanding of the main public procurement requirements of UK and EU legislation.		03/07/2014	28/08/2014	03/07/2014	03/07/2014		03/07/2014	28/08/2014	28/08/2014			07/08/2014	07/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014

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	Supplier risk manage-ment	Awareness of the nature and scope of risks for the pension fund and of the importance of considering risk factors when selecting third parties.		03/07/2014	28/08/2014	03/07/2014	03/07/2014		03/07/2014	28/08/2014	28/08/2014			07/08/2014	07/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014
agement	Total fund	Understanding of the importance of monitoring asset returns relative to the liabilities and a broad understanding of ways of assessing long-term risks.		03/07/2014	28/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014	28/08/2014	28/08/2014			07/08/2014	07/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014
Investment performance and risk management	Perform-ance of advisors	Awareness of the Myners principles of performance management and the approach adopted by the committee.		03/07/2014	28/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014	28/08/2014	28/08/2014			07/08/2014	07/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014
nvestment perforr	Perfor-mance of the committee	Awareness of the Myners principles and the need to set targets for the committee and to report against them.		03/07/2014	28/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014	28/08/2014	28/08/2014			07/08/2014	07/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014
=	Performance of support services	Awareness of the range of support services, who supplies them and the nature of the performance monitoring regime.		03/07/2014	28/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014	28/08/2014	28/08/2014			07/08/2014	07/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014

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	Investment strategy	Awareness of the risk and return characteristics of the main asset classes (equities, bonds, property).		03/07/2014	28/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014	28/08/2014	28/08/2014			07/08/2014	07/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014
nowledge	Investment strategy	Understanding of the role of these asset classes in long-term pension fund investing.		03/07/2014	28/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014	28/08/2014	28/08/2014			07/08/2014	07/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014
and products k	Financial markets	Understanding of the primary importance of the investment strategy decision		03/07/2014	28/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014	28/08/2014	28/08/2014			07/08/2014	07/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014
Financial markets and products knowledge	Financial markets	A broad understanding of the workings of the financial markets and of the investment vehicles available to the pension fund and the nature of the associated risks.		03/07/2014	28/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014	28/08/2014	28/08/2014			07/08/2014	07/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014
	Financial markets	An awareness of the limits placed by regulation on the investment activities of local government pension funds.		03/07/2014	28/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014	28/08/2014	28/08/2014			07/08/2014	07/08/2014	03/07/2014	03/07/2014	03/07/2014	03/07/2014

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ractices	Valuations	Knowledge of the valuation process, including developing the funding strategy in conjunction with the fund actuary, and intervaluation monitoring.		17/06/2014	28/08/2014	17/06/2014	03/07/2014		17/06/2014	28/08/2014	28/08/2014			07/08/2014	07/08/2014	17/06/2014	17/06/2014	17/06/2014	17/06/2014
standards and p	Valuations	Awareness of the importance of monitoring early and ill health retirement strain costs.		17/06/2014	28/08/2014	17/06/2014	03/07/2014	17/06/2014	17/06/2014	28/08/2014	28/08/2014			07/08/2014	07/08/2014	17/06/2014	17/06/2014	17/06/2014	17/06/2014
Actuarial methods, standards and practices	Valuations	A broad understanding of the implications of including new employers into the fund and of the cessation of existing employers.		17/06/2014	28/08/2014	17/06/2014	03/07/2014	17/06/2014	17/06/2014	28/08/2014	28/08/2014			07/08/2014	07/08/2014	17/06/2014	17/06/2014	17/06/2014	17/06/2014
	Outsourcing	A general awareness of the relevant considerations in relation to outsourcings and bulk transfers.		17/06/2014	28/08/2014	17/06/2014	03/07/2014	17/06/2014		28/08/2014	28/08/2014			07/08/2014	07/08/2014	17/06/2014	17/06/2014	17/06/2014	17/06/2014