

Local Pension Board - Members Training Log					Chairman	Member Reps				Employer Reps				
Date	Mandatory / Advisory / Additional	Title	Event	Training Need	Howard Pearce	Mike Pankiewicz	David Bowater	Barry Read	Councillor Newbury	Councillor Britton	Lynda Croft	Sarah Holbrook	Kirsty Cole	
					Appointed	12/05/15	14/07/15	14/07/15	14/07/15	14/07/15	16/05/17	14/07/15	23/02/16	14/07/15
					Next Re-election due	12/05/19	14/07/19	14/07/19	14/07/19	-	16/05/21	-	23/02/20	-
					Left	-	-	-	-	16/05/17	-	05/03/18	-	23/02/16
					Service Dates									
Set up	-	Mandatory	Self-Assessment Questionnaire	Questionnaire	Establish Training Needs									
	02/07/15	Mandatory	Local Pension Board Induction Day	Local Pension Board Internal Presentation	Overview of the role and context of the LPB, details of the LGPS and specifically the background to the Wiltshire Pension Fund and its key documents and policies									
	07/04/16	Mandatory	Induction Session	One to One with Head of Pensions	As above									
	By 31 July 2016	Mandatory	TPR On-line Toolkit	On-line	tPR toolkit to fulfil requirement that all Board members should have the basic requisite knowledge and understanding						In progress June 2018			
-	Advisory	Local Pension Board Members Handbook	Sent by email / on website	Provides overview of role and structure of the LGPS with links to all main policy documents and regulations										
2015/16	-	Advisory	Hymans Robertson Pension Updates	Email Newsletter	Update on latest pension issues for LGPS									
	13/07/15	Optional	Investment Review Away Day	Pension Committee Event - optional	Review of current investment issues									Not in LPB Annual Report?
	16/07/15	Advisory	Knowledge & Understanding Requirements for the role	Local Pension Board Internal Presentation	Knowledge & Understanding of role									
	22/10/15	Advisory	Conflicts of Interest & Code of Conduct	Local Pension Board Internal Presentation	Awareness of conflicts and code of conduct requirements for Board members									
	14/01/16	Advisory	The Pension Regulator Code of Practice & Record Keeping Regulations	Local Pension Board Internal Presentation	Awareness of the Regulators requirements for the operation of a public service pension scheme									
	14/01/16	Advisory	Administering Authority Discretions	Local Pension Board Internal Presentation	Understanding on the discretions the Wiltshire Pension Fund can apply in the administration of the LGPS									
20/01/16	Additional	Unison Regional Forums for Local Pension Board Members												
2016/17	07/04/16	Advisory	Triennial Valuation 2016	Local Pension Board Internal Presentation	Overview of the process for the valuation									
	20/07/16	Advisory	Investment Pooling & the Brunel Pension Partnership	Local Pension Board Internal Presentation	Update on the proposed investment pooling proposals in response to Government consultation									
	20/10/16	Advisory	Valuation Update	Local Pension Board Internal Presentation	Update on the outcome of the 2016 Triennial Valuation (+ Asset pooling training)									
	-	Optional	LGA Fundamentals Training	External 3 day course - optional	Overview of LGPS operations, regulations, investments and governance									Not in LPB Annual Report?
	25/04/16	Optional	LGPS Pensions Board Seminar	External event	Review of common themes from Board's nationally									Not in LPB Annual Report?
	09/06/16	Optional	Members Training Away Day	Pension Committee Event - optional	Investment Pooling, Baillie Gifford, investment regs, Asset Allocation review									
	17/05/16	Optional	PLSA Local Government Conference	External 2 day conference - optional	Covering pooling, governance, administration and investment issues including LPBs.									
	06/09/16	Optional	LGC Investment Conference	External 2 day conference - optional	Covering investments and valuation issues									
	14/10/16	Optional	Brunel Pension Engagement day	Co-host Wiltshire Pension Fund - optional	Update on the latest investment proposal and introduction to the Full Business Case									
	13/04/16	Additional	LGPS Asset Pooling Conference	1/2 day seminar										
	06/06/16	Additional	Responsible Investor EU 2016	2 day conference										
	27/07/16	Additional	LGPS Communications Training	1/2 day seminar										
	10/08/16	Additional	Investment Pooling Q&A sessions	External event										
	29/09/16	Additional	GAD LGPS Section 13 Training Event	1 day seminar										
	07/10/16	Additional	Responsible Investment ESG Manager selection - LGPS pooling	1 day conference										
	13/10/16	Additional	Unison Regional Forums for Local Pension Board Members											
	02/11/16	Additional	Brunel Pension Partnership training		BPP external event									Not in LPB Annual Report?
17/11/16	Additional	SPS LGPS Fund event	1 day seminar											
12/12/16	Additional	Unison LGPS Annual Forum												
19/01/17	Additional	Unison Regional Forums for Local Pension Board Members												
02/02/17	Additional	LAPF LGPS event	External 1 day conference - optional										Not in LPB Annual Report?	
2017/18	06/04/17	Advisory	Data Protection & Quality Standards - Hymans	Local Pension Board Internal Presentation										
	13/07/17	Advisory	Complaints & Dispute Handling	Local Pension Board Internal Presentation										
	18/10/17	Advisory	Fraud Prevention & Mitigation update - Hymans	Local Pension Board Internal Presentation										
	15/03/18	Advisory	Annual Reporting Requirements	Local Pension Board Internal Presentation										
	16/05/17	Optional	PLSA Local Government Conference											
	22/05/17	Optional	LGPS, Investment Strategy, Governance, BPP - Hymans	Pension Committee Event - optional										
	21/06/17	Optional	Wiltshire Pension Fund AGM	1 day conference										
	01/03/18	Optional	LGC Investment Conference											
	20/07/17	Additional	General Data Protection Regulations											
	08/09/17	Additional	LGPS investment training	External 2 day conference - optional										
	01/11/17	Additional	Fund Investment Away day											
	10/11/17	Additional	LGPS summit	External 2 day conference - optional										
	15/11/17	Additional	Brunel Pension Partnership engagement day	External 1 day conference - optional										
	07/02/18	Additional	CIPFA LPB training	External 1 day conference - optional										
26/03/18	Additional	CIPFA LPB training	External 1 day conference - optional											
27/03/18	Additional	SAB LPB/PC Forum	External 1 day conference - optional											
2018/19	26/06/18	Mandatory	Knowledge & Understanding Assessment - Hyman's	On-line questionnaire	Review of training needs since last assessment in 2015									
	26/06/18	Mandatory	LPB Member Effectiveness questionnaire - Hyman's	On-line questionnaire	Review of training needs since last assessment in 2015									
	26/06/18	Optional	National Confidence Assessment - Hyman's	On-line questionnaire										
	09/05/18	Optional	Investment Away Day - Collateral Management - Mercer	Pension Committee Event - optional										
	27/06/18	Additional	CIPFA LPB annual conference	External 1 day conference - optional										
	-	Additional	GAD S13/data workshops											
-	Additional	LPB Annual Conference												

Key			
Training attended	Training not attended	No requirement to attend training	Mandatory training missed