

**NORTHUMBERLAND COUNTY COUNCIL PENSION FUND
Pension Fund Panel Meeting 22 February 2019**

Officer training record

Training includes anything which enables the individual to develop knowledge and skills of relevance to his/her role, *such as* external training, reading relevant material, attendance at meetings/events, and own research. This record shows only **significant** items of relevance.

Supervisory senior managers

Alison Elsdon Service Director - Finance		Completion of CIPFA CPD requirements covering local authority accountancy Review of Pension Fund Panel reports and other related reports including reports to full Council and RAP Review of detailed notes of meetings following each Pension Fund Panel meeting Review of Pension Fund Annual Report and Accounts and external audit findings Ad hoc written/verbal briefings from Principal Accountant (Pensions) – Project Officer
Andy Stewart Finance Manager	Earlier	Completion of CIPFA CPD requirements covering local authority accountancy Review of detailed notes of meetings following each Pension Fund Panel meeting Regular verbal and ad hoc written briefings from Principal Accountant (Pensions) – Project Officer Attendance at actuarial valuation training meeting in York in Sep 2013

Senior managers with day to day involvement

Clare Gorman Principal Accountant – Project Officer (Pensions)		CIPFA Actuarial Summit – January 2019 LGA Trustees Conference – January 2019 BCPP Annual Conference – November 2018 BCPP Workshops (Various) – 2018 to date PLSA Local Authority Conference – May 2018 CIPFA Governance in a Changing Environment – July 2017 LGA Trustees Conference – June 2017 CIPFA Pooling Event – March 2017
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	<p>CIPFA Pension Fund Audit and Accounting – February 2017</p> <p>CIPFA Actuarial Summit – January 2017</p> <p>CIPFA Annual Pensions Conference – November 2016</p> <p>AON Hewitt Actuarial Valuation Training – September 2016</p> <p>GAD Section 13 Roadshow – September 2016</p> <p>LGA Trustees Conference – June 2016</p> <p>LGA Training on Fire Pension Scheme – March 2016</p> <p>Hymans Robertsons “Funding Objectives” Event – March 2016</p> <p>CIPFA Accounting and Auditing Workshops – February 2016</p> <p>CIPFA LGPS Pensions Summit 2016 – January 2016</p> <p>Aon Hewitt “Reporting of Breaches” Training – December 2015</p> <p>CIPFA Pensions Network Annual Conference – November 2015</p> <p>CIPFA Autumn Workshop – October 2015</p> <p>Eversheds Training on Local Pensions Boards – October 2015</p> <p>SSAB event - April 2015</p> <p>CIPFA Pensions Workshop Accounting and Audit Technical Update - Feb 2015</p> <p>Eversheds Local Pension Board event - February 2015</p> <p>CIPFA LGPS Governance Summit - Jan 2015</p> <p>CIPFA Pensions Network Annual Conference - Nov 2014</p> <p>CIPFA Pensions Workshop Managing Change - Oct 2014</p> <p>CIPFA Pensions Workshop Governance and Efficiency - Jul 2014</p> <p>Mercer workshop on LGPS Structural Reform Consultation - Jun 2014</p> <p>Hyman’s Robertson’s event on Structural Reform Consultation - Jun 2014</p> <p>CIPFA Pensions Workshop Future Structure of the LGPS - April 2014</p> <p>Preparation of Pension Fund Panel (and other related) reports and detailed notes of meetings</p> <p>Attendance/Presentation at all Pension Fund Panel meetings and York training in March 2015</p>
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		<p>Member of officer/member Working Group including group lead for establishing the FPS and LGPS local Pension Boards</p> <p>Own research, networking, reading material produced by tPR, LGA, DCLG (including Regulations), Aon Hewitt, Mercer, Hymans Robertson, Eversheds and other leading LGPS experts, responding to DCLG consultations, preparation/updating relevant policy statements</p> <p>Preparation of Pension Fund Annual Report and Accounts and liaison with external audit</p> <p>Knowledge and experience gained through obtaining ICAEW qualification and CPD. Over 20 years' local authority finance experience most as NCC Pension Fund accountant, attendance at LGA 3-day Fundamentals course, CIPFA Pensions Network workshops and other relevant events</p>
<p>Craig Johnson Senior Accountant (Pensions)</p>		<p>CIPFA Pension Fund Audit and Accounting – February 2019</p> <p>LGA Governance Conference – January 2019</p> <p>LGA Trustee Training Fundamentals Day 3 – December 2018</p> <p>CIPFA Annual Pensions Conference – November 2018</p> <p>BCPP Annual Conference – November 2018</p> <p>LGA Trustee Training Fundamentals Day 2 – November 2018</p> <p>GAD Section 13 Roadshow – June 2018</p> <p>CIPFA Pension Fund Audit and Accounting – February 2018</p> <p>LGA MiFID ii and Cost Transparency – August 2017</p> <p>CIPFA Governance in a Changing Environment – July 2017</p> <p>LGA Trustees Conference – June 2017</p> <p>CIPFA Pension Fund Audit and Accounting – February 2017</p> <p>CIPFA Pension Fund Accounts Workshop – January 2017</p> <p>BCPP Legal Workshop – December 2016</p> <p>AON Hewitt Actuarial Valuation Training – September 2016</p> <p>GAD Section 13 Roadshow – September 2016</p> <p>CIPFA Pensions Network Scottish Workshop – September 2016</p> <p>PIRC Training – July 2016</p> <p>LGA Trustees Conference – June 2016</p>

	<p>LGA Training on Fire Pension Scheme – March 2016</p> <p>CIPFA Accounting and Auditing Workshops – February 2016</p> <p>CIPFA Pensions Network Workshops – October 2015</p> <p>CIPFA Investment Regulations Summit – January 2016</p> <p>Aon Hewitt “Reporting of Breaches” Training – December 2015</p> <p>LGA Trustee Training Fundamentals Day 1 – October 2015</p> <p>Eversheds Training on Local Pensions Boards – October 2015</p> <p>CIPFA Introduction to the LGPS Workshop – September 2015</p> <p>LGA Criteria for Pooling Event – January 2016</p> <p>Attendance at numerous Border to Coast Pool Partnership (BCPP) officer meetings and Member Steering Group (MSG) meetings.</p> <p>Preparation of Pension Fund Annual Report and Accounts and liaison with external audit since 2015</p> <p>Preparation of Pension Fund Panel (and other related) reports and detailed notes of meetings since September 2015</p> <p>Attendance/Presentation at all Pension Fund Panel/Board meetings since September 2015.</p>
<p>Andrew Lister Principal Accountant (Pensions)</p>	<p>CIPFA Pension Fund Audit and Accounting – February 2019</p> <p>LGA Governance Conference – January 2019</p> <p>CIPFA Annual Pensions Conference – November 2018</p> <p>MHCLG Infrastructure Event – November 2018</p> <p>LGPS Covenant Training Event – November 2018</p> <p>BCPP Annual Conference – November 2018</p> <p>LGA Trustee Training Fundamentals Day 2 – November 2018</p> <p>LGA Trustee Training Fundamentals Day 1 – October 2018</p> <p>Infrastructure Event – October 2018</p> <p>BCPP Workshops (Various) – September 2018</p> <p>GAD Section 13 Roadshow – June 2018</p> <p>CIPFA Pension Fund Audit and Accounting – February 2018</p> <p>CIPFA Pension Fund Accounts Workshop – January 2018</p>

		<p>LGA Trustee Training Fundamentals Day 3 – December 2017</p> <p>CIPFA Pensions Annual Conference – November 2017</p> <p>CIPFA Investment Conference – October 2017</p> <p>CIPFA Governance in a Changing Environment – July 2017</p> <p>PLSA Local Authority Conference – May 2017</p> <p>Preparation of Pension Fund Annual Report and Accounts and liaison with external audit since 2018</p> <p>Preparation of Pension Fund Panel (and other related) reports and detailed notes of meetings since June 2017</p> <p>Attendance/Presentation at all Pension Fund Panel/Board meetings since February 2017.</p>
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