





## Surrey Pension Fund Board: Training Assessment

### Self Assessment Questionnaire: Results

#### Member

1

#### Investments

Asset allocation strategies	3
Appointing Fund managers	3
Investment Risk	3
Liability driven strategies	2
Equities	3
Government bonds	3
Corporate bonds	3
Property	3
Private equity	3
Infrastructure	3
Hedge funding	2
Commodities	2
Currency	2
Global Custody	2
Stock Lending	2

#### Local Authorities and the Local Government Pension Scheme

Actuarial Valuation and Funding strategies	3
Local government finance and council tax	4
LGPS benefits and administration	3
General pension legislation	3
Admissions Policy	3
Governance policy	3
Roles and responsibilities of an LGPS Board Member and administering authority	3
LGPS investment Regulations and Limits	3

#### General Management

Financial planning budgetary control	4
Accounting and audit	4
Risk management	3
Procurement	3

#### Environmental Social and Governance Investment Issues

UK Code of Corporate Governance	2
Stewardship Code	2
CIPFA/Myners Principles	3
Environmental/Social/Governance (ESG) consideration	2
Share voting	2

#### Test

#### Member

1

Legislation and Governance	18
Accounting and Audit	8
Procurement and Relationship	13

Investment Performance and Risk	8
Financial Markets	15
Actuarial	16
<b>Total</b>	<b>78</b>

Legislation and Governance	67%
Accounting and Audit	73%
Procurement and Relationship Management	68%
Investment Performance and Risk Management	73%
Financial Markets and Product Knowledge	75%
Actuarial	70%
<b>Overall</b>	<b>70%</b>

Member 2	Member 3	Member 4	Member 5	Member 6	Member 7	Member 8	Member 9	
3	3	2	3	4	3	4	4	
3	3	2	3	4	3	4	4	
3	3	2	3	4	3	4	4	
2	3	1	3	4	3	3	4	
3	3	2	4	4	3	4	4	
3	3	2	4	4	3	4	4	
3	3	2	4	4	2	4	4	
3	3	2	3	3	2	4	3	
3	3	2	3	3	3	4	2	
2	2	2	3	4	2	4	2	
3	2	1	3	4	2	4	3	
2	2	1	3	3	2	4	2	
2	2	2	3	3	2	4	3	
2	3	1	2	3	1	4	2	
2	2	1	2	3	2	4	3	
3	3	2	3	4	3	3	4	
3	4	3	3	3	3	4	3	
3	3	2	2	3	3	3	4	
2	3	2	2	2	2	3	4	
2	3	2	2	2	3	3	2	
2	3	2	3	2	3	4	3	
2	3	2	3	3	3	4	3	
2	3	2	2	2	2	4	2	
3	4	2	2	3	3	4	3	
4	4	2	2	2	2	4	3	
3	3	2	3	3	3	4	3	
3	3	2	2	2	2	4	3	
2	3	2	2	2	2	4	2	
1	2	2	2	2	3	4	2	
1	3	2	3	2	3	4	3	
2	2	2	2	2	3	4	2	
3	3	2	2	2	3	4	2	
Member 2	Member 3	Member 4	Member 5	Member 6	Member 7	Member 8	Member 9	Member 10
18	16	19	13	20	17	12	13	11
5	8	7	5	6	5	7	9	4
12	12	13	13	15	12	11	15	9

9	10	8	9	10	10	8	9	7
18	16	18	15	17	17	11	18	17
15	20	17	14	18	18	9	18	15
<b>77</b>	<b>82</b>	<b>82</b>	<b>69</b>	<b>86</b>	<b>79</b>	<b>58</b>	<b>82</b>	<b>63</b>

67%	59%	70%	48%	74%	63%	44%	48%	41%
45%	73%	64%	45%	55%	45%	64%	82%	36%
63%	63%	68%	68%	79%	63%	58%	79%	47%
82%	91%	73%	82%	91%	91%	73%	82%	64%
90%	80%	90%	75%	85%	85%	55%	90%	85%
65%	87%	74%	61%	78%	78%	39%	78%	65%
<b>69%</b>	<b>74%</b>	<b>74%</b>	<b>62%</b>	<b>77%</b>	<b>71%</b>	<b>52%</b>	<b>74%</b>	<b>57%</b>

## Average

3.2

3.2

3.2

2.8

3.3

3.3

3.2

2.9

2.9

2.7

2.7

2.3

2.6

2.2

2.3

3.1

3.3

2.9

2.6

2.4

2.8

2.9

2.4

3.1

3.0

3.0

2.7

2.3

2.2

2.7

2.3

2.6

Total in Section

27

11

19

11  
20  
23  
**111**

**58%**  
**58%**  
**66%**  
**80%**  
**81%**  
**70%**  
**68%**