

May REF training session feedback

During the workshops we asked participants for their views on the various elements of training that are currently provided (see the Workshop presentation slides for the questions asked). The purpose was to help our understanding, to ensure we provide the best service for employers going forward.

The feedback was very positive and insightful and this document highlights the key findings for each of the key areas we discussed.

- Employer Administration Guide
- Employer Supplementary Training
- Pension Power
- Member Supplementary Training

Employer Administration Guide (EAG)

Frequency and Format of Training

- Annual updates are important, but they should be meaningful - not just a tick-box exercise
- Modular and flexible formats are preferred, allowing staff to complete training throughout the year
- Refresher or top-up modules should be available instead of repeating the full training annually
- Tailored content based on role, experience, or previous completion is needed.

Learning Value and Engagement

- Training is often repetitive and not engaging - same questions every year
- Limited new learning for experienced staff; more value if content is updated or role-specific
- Knowledge checks are appreciated when they genuinely test understanding
- Enjoyable when it confirms knowledge but can be overwhelming or irrelevant.

Audience and Relevance

- Great for new starters, but less useful for experienced staff unless updated
- Not all content is relevant to all roles (e.g., pension calculations not needed by everyone)
- Different roles need different modules - a one-size-fits-all approach doesn't work well
- Small organisations may benefit from a pre-test to assess knowledge gaps.

System and Access Issues

- Licensing is a major barrier - limited access restricts team-wide learning
- Technical issues like tracking progress or outdated content reduce effectiveness
- Navigation is easy, but more process maps and practical content would help
- Linking to the Employer Portal could improve tracking and access.

Monitoring and Accountability

- Evidence-based assurance is preferred over tick-box compliance
- Annual assurance statements should be meaningful and reflect actual understanding
- Reporting and feedback mechanisms (e.g., Management Information (MI)) are missing but desired
- Responsibility clarity - who should complete what, and how it's monitored.

Suggestions for Improvement

- Introduce role-specific modules and bespoke training
- Allow face-to-face or alternative formats for better engagement
- Provide prompts and reminders for updates
- Include more practical, admin-focused content
- Consider a test-first approach to tailor learning paths.

Employer Supplementary training

Training Format and Delivery

- Online training is preferred for convenience and accessibility
- Face-to-face training is valued, but uptake is low due to logistic
- Podcasts and hot topic sessions are popular and engaging
- Training journey mapping would help structure learning logically
- Refresher training is useful, especially for new or transitioning staff.

Cost and Accessibility

- Cost is a major barrier - many can't justify expensive training
- Free or discounted training is highly appreciated and more accessible
- Shared or tiered pricing models could support smaller employers
- Bespoke or specialist training could be charged separately.

Content Relevance and Quality

- Training is often too basic or not pitched at the right technical level
- High-quality training boosts confidence and is well-received
- Tailored content based on role or experience is needed
- Modeller and interface training are in demand.

Business Need and Justification

- Training must align with a clear business need to justify attendance
- Employee engagement tools are used to assess training needs
- Busy schedules mean advance notice and relevance are key to participation.

Impact and Outcomes

- Training helps reduce errors and improve data quality
- Better-trained staff means fewer queries and smoother operations
- Confidence and capability increase with effective training.

Pension Power

Content and Relevance

- Sessions are generally well-received, informative, and easy to understand
- New joiner sessions are appreciated but need better timing and visibility
- Pre-retirement content is lacking or not detailed enough - members want more on lifestyle, partial retirement, and added pension
- Hot topics and specific themes (e.g., Remedy, Capita transition) are valued and should be expanded.

Format and Delivery

- Recorded sessions are highly requested for flexibility and accessibility
- Live sessions are engaging but often run out of time - suggested to extend by 30 minutes
- Simple, jargon-free language is appreciated
- Webinars and videos are preferred over static content
- Accessibility issues (e.g., for deaf members) need to be addressed.

Promotion and Awareness

- More promotion needed, especially for new joiners and employers unaware of the sessions.
- Suggestions include:
- Adding links to induction materials
- Including in email footers
- Direct calendar invites for new joiners
- Employer-led encouragement to attend

Monitoring and Feedback

- Employers want MI on:
- Who has attended
- Engagement levels
- Session effectiveness
- FAQs and follow-up to unanswered questions would improve the experience.

Access & Technical Barriers

- Email firewalls and IT issues prevent some members from receiving invites or accessing sessions.
- Not all members are desk-based, so alternative communication methods are needed.
- Portal integration with session listings and recordings would help.

Member Supplementary Training

Funding and Responsibility

- Employers typically pay for training, but practices vary
- Some only fund specific sessions (e.g., pre-retirement, not partial retirement)
- A few employers ask members to pay for their own training
- There's a strong preference for centrally funded training, ideally free to employers and members
- Tailored training packages are appreciated, especially when aligned with employer size or needs.

Training Delivery and Content

- Pension Power sessions are widely used and valued
- Admin-focused sessions are helpful when easy to access
- Some sessions (e.g., tax) are seen as too generic - more targeted, specific content is needed
- Lifestyle and financial advice topics are missing or underrepresented
- PSS and pre-retirement are suggested as useful additions.

Communication and Promotion

- Employers want centralised communications to reduce their own burden
- Regular comms to members would improve awareness and uptake
- Portal integration is helpful but currently lacks personalised prompts
- Email communication is a challenge
- Work emails often blocked or filtered
- Personal emails are preferred but not always available
- Suggestion to mandate email collection (though not feasible for all, e.g., MOD).

Member Engagement and Tools

- AI/chatbots could support real-time learning during sessions
- Landing pages and line manager walkthroughs to help guide new members
- Holistic training approaches are lacking - many employers don't have a structured internal strategy.