

**Certification Program
Public Service pension plan
Retirement Planning
Information Session**

**Centralization of Pension Services
Delivery Project**

Public Service Pension Centre

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1.0 Background

After a thorough review of the possible options for the delivery of information sessions to the *Public Service Superannuation Act* (PSSA) plan members in preparation for their retirement, it has been decided that the responsibility for overseeing the delivery of the Public Service pension plan portion of pre-retirement seminars will be centralized in the Public Service Pension Centre of Public Works and Government Services Canada (PWGSC), located in Shediac, New Brunswick. The information session will now be known as the Public Service pension plan Retirement Planning Information Session (RPIS).

The information shared in these sessions must be accurate and consistent. In order to achieve this level of quality, the Public Service Pension Centre of PWGSC will use this Certification Program to certify all persons delivering the Public Service pension plan Retirement Planning Information Sessions. Persons delivering the sessions will be individuals with extensive pension expertise. This program will also include periodic monitoring and re-certification of the persons delivering the sessions. The program will be available in both official languages.

The Public Service Pension Centre will be responsible for developing, updating and distributing the presentation material for all Public Service pension plan Retirement Planning Information Sessions (regular, Executive and Correctional Services Canada).

A Memorandum of Understanding (MOU) signed by stakeholders, that is departments or consultants and PWGSC, will delineate their roles and responsibilities and those of Public Service Pension Centre as well as the financial obligations of all parties.

2.0 Session Description

The Public Service pension plan Retirement Planning Information Session is a half-day interactive session and is designed to encourage questions from the participants. Based on the Public Service Pension Centre's experience in delivering these sessions, response to these questions demands that pension knowledge is thorough and quickly accessed from memory.

3.0 Selection Criteria

Persons eligible for the Certification Program must have the following experience, abilities, skills and competencies:

Experience: Four years experience in providing information on the interpretation of pension policies and the explanation of pension processes and issues.

Personal Competencies: To effectively deliver these sessions, presenters should have a positive, dynamic and outgoing personality. Also, they must have the following competencies:

- Dependability
- Client oriented
- Problem solving
- Flexibility

4.0 Required Competencies

The persons selected to participate in the Certification Program will have to demonstrate to the Public Service Pension Centre evaluators that they possess the following competencies.

Knowledge: A strong knowledge of pension related rules, regulations and policies pertaining to the *Public Service Superannuation Act* and the *Pension Benefit Division Act*, administered by PWGSC. Knowledge of the following topics will be evaluated:

- How Your Pension Plan Works
- Retirement Benefits (including Transfer Value)
- Indexing
- CPP/QPP Integration
- Elective Service
- Death Benefit Plan
- Survivors Benefits
- Pension Division
- Income Tax Implications
- Public Service Health Care Plan and Dental Plan for Pensioners

Note: Knowledge related to the particularities of the plans as they pertain to Executives and Correctional Services Canada will be evaluated by two other distinct tests.

Abilities and Skills

- Ability to effectively and correctly answer questions during a session.
- Ability to communicate orally in an effective manner.

- Ability to use audiovisual equipment and computer generated slide shows in Freelance or PowerPoint

5.0 Certification Process

All persons identified as a deliverer of the Public Service pension plan Retirement Planning Information Sessions will be certified by PWGSC. The Chief, Training and Outreach Services, Public Service Pension Centre on behalf of PWGSC will issue the certification document. The Certification Program will consist of two parts: a knowledge test and a live presentation assessed by PWGSC evaluators. The knowledge test and the presentation techniques will be assessed in accordance with PWGSC standards and processes. The following outlines the certification process:

Experience, Abilities, Skills and Personal Competencies Assessment

The selection of departmental employees to be certified for the program is the responsibility of the recommending manager. The manager will ensure that the persons referred meet the selection criteria identified in section 3.0. Managers may refer to Appendix A for guidance in assessing personal competencies. The manager will forward the referral's name, telephone number and e-mail address to the Chief, Training and Outreach Services, Public Service Pension Centre.

In the case of private firms referring individuals, a person of authority (e.g. the President of the company) must ensure that the selection criteria identified in section 3.0 are met prior to forwarding the required information to the Chief, Training and Outreach Services, Public Service Pension Centre.

Individual consultants must ensure that their application reflects that they meet the selection criteria identified in section 3.0. They may refer to Appendix A for guidance in assessing their personal competencies. Upon receipt of the application of an individual consultant, the Chief, Training and Outreach Services, Public Service Pension Centre will determine the individual's eligibility to participate.

Knowledge Assessment

- The knowledge test(s), available in the candidate's preferred language, will be written in the person's region of work. A third party, preferably a Human Resource Officer, will administer the test(s) in a secure environment.
- The manager or consultant will provide the coordinates of the test administrator, a third party acceptable to both the sponsoring organization and to the Chief, Training and Outreach Services, Public Service Pension Centre.
- The test administrator will be provided with guidelines for administering the test.
- The Chief, Training and Outreach Services, Public Service Pension Centre and the test administrator, will determine the test date.
- The person referred for certification will receive an electronic copy of the program presentation and speaking notes, two weeks prior to the knowledge test(s) date(s).
- The knowledge test(s) will be returned to the Public Service Pension Centre for correction. Test administrators will be instructed to shred virgin copies of the test and to delete relevant e-mails to maintain the integrity of the program. The Chief, Training and Outreach Services, Public Service Pension Centre will ensure that all tests are corrected within 72 hours of receipt in that office.
- Persons passing the knowledge test will be invited to deliver the Public Service pension plan Retirement Planning Information Session. The referring manager or consultant will determine whether the presentation will be delivered in person in Shediac, NB or via video-conference and will advise the Chief, Training and Outreach Services, Public Service Pension Centre.
- All costs incurred in relation to the knowledge assessment will be paid by the organization referring the individual.

Presentation Assessment

- The person will deliver the presentation, in its entirety, to an evaluation committee, who will also ask questions similar to ones received in past sessions to further evaluate the candidate's knowledge. The individual's ability to answer questions accurately "on the spot" and the communication techniques will also be observed
- A date for the presentation of the Public Service pension plan Retirement Planning Information Session will be set by the successful individual and his/her manager, or by the contractor, with the Chief, Training and Outreach Services, Public Service Pension Centre.
- An agreement will determine whether the candidate will deliver the presentation by video-conference or in person.
- All costs incurred in relation to the delivery of the presentation (travel, accommodation or video-conferencing) will be paid by the organization referring the individual.

- If travel is required:
 - The person giving the presentation will make travel arrangements.
 - The person will travel to Shediac, New Brunswick the day before the scheduled day of the presentation.
 - The meeting room will be available for set up one hour before the presentation. A laptop, LCD Projector and flip chart will be available. Persons wishing to bring their own equipment may do so.
 - The candidate will return home the same day when possible.
- The candidate will receive written feedback within 72 hours after the process by e-mail.

6.0 Assessment Criteria

The knowledge test will consist of a group of questions from all aspects of the pension plan covered in the Public Service pension plan Retirement Planning Information Sessions. The questions will be randomly selected from a pool of questions thereby ensuring that the content of the test is continually renewed. All knowledge questions were developed by referencing the following sources:

Your Public Service Pension and Benefits

(<http://pensionetavantages-pensionandbenefits.gc.ca/accueil-home-eng.html>)

Your Pension Plan Booklet

(http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/pensions/ypp-eng.asp)

The *Pension Benefits Division Act* (PBDA) Information Kit

(<http://www.tpsgc-pwgsc.gc.ca/remuneration-compensation/lppr-pbda/lppr-pbda-eng.html>)

The Insurance Administration Manual

(<http://www.tpsgc-pwgsc.gc.ca/remuneration-compensation/ara-iam/ara-iam-menu-eng.html>)

Please note that reference material will not be accessible to individuals when they are writing the test(s).

The pass mark for the knowledge test is 85%.

During the "in-person" or video-conference presentation, Public Service Pension Centre evaluators will be observing the following elements:

- Verbal and nonverbal communication skills
- Audio-Visual skills
- Responsiveness to Audience
- Subject knowledge

The pass mark for the presentation portion of the Certification Program is 85%.

Candidates who have obtained at least 75% will be eligible to be retested by PWGSC for either evaluation. The retest will be scheduled by PWGSC a minimum of sixty days from the notification date of the results of the original test.

Candidates who have obtained less than 75% on either evaluation will be eligible to reapply for certification by PWGSC after a six month waiting period from the notification date of the results of the original test. The process will restart with the first step that is the referral of the individual.

7.0 Monitoring and Evaluation

Once certified, a person will become part of the delivery team and will receive regular updates on the program or changes in policy as well as ongoing program support from the Public Service Pension Centre.

On a periodic basis, each person delivering the sessions will be reevaluated. The need for reevaluation may stem from instances such as, the introduction of significant changes to the pension plan or to the presentation content or from the need to follow-up on client feedback. An officer from the Public Service Pension Centre will arrange to join each person while they are delivering a session in their region to observe and evaluate their performance.

The costs associated with this activity will be borne by PWGSC. Feedback will be given within 72 hours of the monitoring; written confirmation will follow within ten working days. The assessment of the presentation will be based on the criteria described in Section 6.0.

If a candidate challenges the reassessment, the case will be referred to the Public Service Pension Centre Senior Management.

APPENDIX A

The enclosed statements may be used as a guide to assess personal competencies of persons being referred for certification as deliverers of the Public Service pension plan Retirement Planning Information Sessions.

- The person is positive, dynamic and has an outgoing personality.
- The person is punctual.
- The person is reliable.
- The person adjusts well to clients needs.
- The person listens to clients needs and responds in a proactive manner.
- The person demonstrates resourcefulness in dealing with unforeseen situations.
- The person is capable of adjusting to unexpected circumstances or changes.