Training course on Governance and Investment of Social Security Funds

Professional Development Training Course Outline

Category	Social Protection	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Governance and Investment of Social Security Funds is a critical and highly specialized area that underpins the long-term sustainability and effectiveness of national social security systems. These funds, accumulated through contributions from workers, employers, and often the state, represent significant national assets entrusted to provide income security and essential benefits to millions of citizens across generations. Prudent governance and sound investment management are paramount to safeguarding these funds, ensuring their financial health, and maximizing returns while managing risks. This specialized field encompasses the entire spectrum of fund management, from establishing robust legal and institutional frameworks to developing sophisticated investment strategies, ensuring transparency, and upholding the highest standards of accountability. It recognizes that effective fund management is not merely a technical exercise but a crucial element of public trust and intergenerational solidarity. Training Course on Governance and Investment of Social Security Funds is meticulously designed to equip with the advanced theoretical insights and intensive practical tools necessary to excel in Governance and Investment of Social Security Funds. We will delve into the foundational principles of fiduciary duty and risk management, master the intricacies of developing comprehensive investment policies, and explore cutting-edge approaches to asset allocation, performance measurement, and ethical investment. A significant focus will be placed on understanding the political economy of fund management, fostering robust oversight, ensuring transparency, and navigating the practical challenges of investing in diverse and often volatile financial markets. By integrating industry best practices, analyzing real-world complex case studies, and engaging in hands-on policy analysis and investment simulation exercises, attendees will develop the strategic acumen to confidently champion and implement exemplary governance and investment practices for social security funds, fostering unparalleled security, efficiency, and public confidence.

Programme Curriculum

Training Course on Governance and Investment of Social Security Funds

Introduction

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Course Objectives

Upon completion of this course, participants will be able to:

1. Analyze the fundamental concepts of **social security funds** and their strategic importance for national development.
2. Comprehend the **principles of good governance** specifically applied to social security institutions and funds.
3. Master the **fiduciary duties and responsibilities** of boards, management, and investment committees.
4. Develop expertise in formulating and implementing a comprehensive **Investment Policy Statement (IPS)**.
5. Formulate strategies for **strategic asset allocation (SAA)** and portfolio diversification for long-term returns.
6. Understand the critical role of **risk management frameworks** in safeguarding social security fund investments.
7. Implement robust approaches to **transparency, accountability, and reporting** in fund management operations.
8. Explore key **legal and regulatory frameworks** governing the investment of social security funds.
9. Apply methodologies for **performance measurement and attribution analysis** of investment portfolios.
10. Develop strategies for **aligning investments with national development priorities** and ESG principles.
11. Analyze the **challenges and opportunities** of investing social security funds in diverse market contexts.
12. Draft preliminary **governance or investment policy recommendations** for a social security fund.

13. Examine **global best practices and lessons learned** from successful social security fund governance and investment.

Target Audience

This course is essential for professionals involved in the oversight and management of social security funds

1. **Social Protection Policymakers:** Shaping the overall policy environment for social security funds.
2. **Social Security Administrators:** Overseeing the operational management of social security institutions.
3. **Pension Fund Managers & Investment Professionals:** Directly managing fund portfolios.
4. **Board Members & Trustees of Social Security Funds:** Exercising oversight and strategic direction.
5. **Actuaries & Economists:** Providing financial and economic analysis for fund sustainability.
6. **Public Finance Experts:** Analyzing the fiscal implications of social security funds.
7. **Legal Professionals:** Advising on legal and regulatory compliance.
8. **Oversight Body Members (e.g., Auditors, Regulators):** Ensuring compliance and good practice.

Course Duration: 5 Days

Course Modules

Module 1: Foundations of Social Security Funds and Governance Principles

- Define social security funds: purpose, types (e.g., pension, health, unemployment), and their role in national economies.
- Discuss the unique characteristics of social security funds (long-term horizon, public trust, large scale).
- Explore core principles of good governance: independence, expertise, transparency, accountability, integrity.
- Analyze the importance of a clear mandate and legal framework for fund governance.
- Overview of global trends and challenges in social security fund management.

Module 2: Fiduciary Duties and Responsibilities

- Master the concept of fiduciary duty: acting solely in the best interests of beneficiaries.
- Discuss the specific duties of loyalty, prudence, and care for fund board members, management, and investment committees.
- Explore the legal implications of breaching fiduciary duties.
- Strategies for managing conflicts of interest and ensuring ethical conduct.
- Case studies illustrating the application of fiduciary principles.

Module 3: Investment Policy Statement (IPS) Development

- Develop expertise in formulating a comprehensive Investment Policy Statement (IPS).
- Discuss key components of an IPS: investment objectives (e.g., long-term real return, inflation protection), risk tolerance, time horizon, liquidity needs.
- Exploring asset-liability management (ALM) principles and their integration into the IPS.
- Ensuring the IPS aligns with the scheme's actuarial projections and sustainability goals.
- Practical exercise: outlining key elements for an IPS.

Module 4: Strategic Asset Allocation (SAA) and Diversification

- Formulate strategies for strategic asset allocation (SAA): determining the optimal mix of asset classes.

- Discuss different asset classes: equities (domestic/international), fixed income (government/corporate bonds), real estate, alternative investments (private equity, infrastructure).
- Explore the principles of portfolio diversification to manage risk and enhance returns.
- Analyzing the impact of market conditions and economic cycles on SAA.
- Case studies of SAA strategies in different social security funds.

Module 5: Risk Management Frameworks for Investment

- Understand the critical role of robust risk management frameworks in safeguarding fund investments.
- Discuss various types of investment risks: market risk, credit risk, liquidity risk, operational risk, currency risk.
- Implementing risk measurement tools (e.g., Value at Risk - VaR, stress testing).
- Developing risk mitigation strategies and internal controls for investment operations.
- Exploring the "three lines of defense" model in risk management.

Module 6: Transparency, Accountability, and Reporting

- Implement robust approaches to transparency in social security fund management.
- Discuss public reporting standards, disclosure requirements, and communication strategies.
- Ensuring accountability of fund managers and governing bodies to contributors and beneficiaries.
- Exploring mechanisms for beneficiary oversight and feedback.
- Case studies of best practices in transparency and accountability.

Module 7: Legal and Regulatory Frameworks

- Explore key legal and regulatory frameworks governing the investment of social security funds.
- Discuss the role of financial regulators, central banks, and specialized social security authorities.
- Analyzing investment restrictions, prudential limits, and reporting requirements.
- Understanding the legal implications of cross-border investments.
- Advocating for legal and regulatory reforms that promote sound fund management.

Module 8: Aligning Investments with National Development and ESG Principles

- Develop strategies for aligning social security fund investments with national development priorities (e.g., infrastructure, housing).
- Discuss Environmental, Social, and Governance (ESG) principles in investment decision-making.
- Exploring responsible investment practices and impact investing.
- Analyzing the trade-offs between financial returns and broader social/developmental objectives.
- Case studies of social security funds investing for both financial and social returns.

Training Methodology

- **Interactive Workshops:** Facilitated discussions, group exercises, and problem-solving activities.
- **Case Studies:** Real-world examples to illustrate successful community-based surveillance practices.
- **Role-Playing and Simulations:** Practice engaging communities in surveillance activities.
- **Expert Presentations:** Insights from experienced public health professionals and community leaders.
- **Group Projects:** Collaborative development of community surveillance plans.
- **Action Planning:** Development of personalized action plans for implementing community-based surveillance.
- **Digital Tools and Resources:** Utilization of online platforms for collaboration and learning.

- **Peer-to-Peer Learning:** Sharing experiences and insights on community engagement.
- **Post-Training Support:** Access to online forums, mentorship, and continued learning resources.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

- Participants must be conversant in English.
- Upon completion of training, participants will receive an Authorized Training Certificate.
- The course duration is flexible and can be modified to fit any number of days.
- Course fee includes facilitation, training materials, 2 coffee breaks, buffet lunch, and a Certificate upon successful completion.
- One-year post-training support, consultation, and coaching provided after the course.
- Payment should be made at least a week before the training commencement to Fineskill Training Center account, as indicated in the invoice, to enable better preparation.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
21 Sep 2026	25 Sep 2026	Online	$1,000
21 Sep 2026	25 Sep 2026	Physical	$1,500
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0
21 Sep 2026	25 Sep 2026	Physical	$0

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