

## TRAINING & SUCCESSION PLANNING COMMITTEE

Revised June 2015

**PURPOSE** To assess the needs for membership training and provide training to state and federal officials in the area of state and local government FICA compliance. Educate state administrators and other officials on the responsibilities of the state administrator and provide advice on succession planning.

### **RESPONSIBILITIES**

1. The Chair of the Training & Succession Planning Committee (Training Committee) will serve as the primary contact for state and federal officials seeking training, succession planning or training information from NCSSSA.
  - A. The Training Committee shall assess the training needs and assist in training state and/or federal officials requesting such training. The Training Committee may conduct an annual training survey, via Survey Monkey (or other such method), to assess the needs, determine topics and assess the proficiency of state administrators.
  - B. Based upon such assessment, the Training Committee shall provide assistance by phone, reference materials, electronically, or other means appropriate to provide the needed training.
  - C. Based upon such assessment and at the beginning of each conference year, the Training Committee shall create annual training plan.
2. The Training Committee, as a whole, may review, edit and enhance training materials and methods.
  - A. The Training Committee shall respond to requests received by the Executive Committee from all states, SSA, and IRS for comments and edits to training materials, such as, but not limited to, the SSA web material, IRS Pub. 963, and the State and Local Coverage Handbook.
  - B. The Training Committee members, as assigned by the Chair or the NCSSSA President, shall participate in various committees, workgroups and other forums where training needs and delivery are of concern.
3. The Training Committee, under the direction of the Training Committee Chair, will devise appropriate training methods.
  - A. Basic Training shall be offered to all NCSSSA State Administrators as needed. The focus of such training will be for new or inexperienced Section 218 administrators. When the NCSSSA budget allows, as determined by the NCSSSA Executive Committee, the Training Committee will calendar three events for the new conference year and Basic Training may be conducted in person and offered on a regional basis with extended (day and one half) training. Such in person training may include representatives from the Training Committee, IRS, SSA Regional Office, SSA Office of General Counsel, and SSA Policy Office and focus on basic roles, responsibilities, terminology, and practices. When practical, such training may be customized to those registered trainees.

- i. Costs of travel for IRS, SSA, and state attendees (trainees) shall be borne by the individual participants.
    - ii. Costs estimates for NCSSSA training personnel shall be approved in advance by the NCSSSA President, according to the NCSSSA Travel Policy.
  - B. Intermediate Training shall be offered to all NCSSSA members as needed. The focus of such training will be for those administrators with experience beyond the Basic Training level. Intermediate Training may be conducted via webinar, teleconference, or other such means, and shall focus on particular topics of interest to membership.
  - C. Advanced Training shall be offered to all NCSSSA members as needed. The focus of such training will be for those administrators with ten or more years of advanced experience. Training may be conducted via webinar, teleconference, or other such means, and shall focus on systemic problem solving.
  - D. During the Conference year, the Chair may issue thank you notes to those state officials hosting and Certificates of Attendance to the trainees joining a regional training event. Additionally, the Chair shall submit Resolution requests to the Resolution Committee for those individuals providing such assistance.
  - E. The Committee may issue certificates of completion to those individuals attending and completing a regional training course.
4. The Training Committee, under the direction of the Training Committee Chair, shall devise ways to aide states in state administrator succession planning.
  - A. The Training Committee may establish and publish on the NCSSSA web site, a best practices treatise on succession planning to include, but not limited to, recruitment, qualifications, and training.
  - B. When requested by a state administrator, the Training Committee may offer guidance on the recruitment and selection of state administrators.
5. Training services shall be made available to all State Administrators and staff for a fee set by the NCSSSA. Training services shall be provided at a reduced rate or may be offered at no cost to dues paying member states. For non-dues paying members, any fee may be reduced or waived at the discretion of the NCSSSA President.
6. The Chair or designee shall prepare and present a Training & Succession Planning Committee Report at the Annual Conference, highlighting committee activities throughout the year. The written report must be prepared consistent with the Secretary's prescribed requirements.
7. The outgoing Chair shall prepare and submit any proposed changes to the above procedures to the Governing Documents Committee within 30 days following the Annual Conference. Changes may also be recommended during the conference year, if deemed necessary and appropriate.
8. The Chair may be designated as a full member of the Governing Documents Committee at the discretion of the President.