

**NATIONAL CONFERENCE OF STATE SOCIAL SECURITY
ADMINISTRATORS
STANDARD OPERATING PROCEDURES
TRAINING & SUCCESSION PLANNING COMMITTEE**

Reviewed: November 2022 Amended: December 2022 Effective: October 1, 2023

PURPOSE

To assess the needs for membership training, to provide training to state and federal officials regarding state and local government Federal Insurance Contributions Act (FICA) compliance, to educate State Administrators and other officials on the responsibilities of the State Administrator role, and to 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 SurveyMonkey or other such method, including the Annual Conference survey, 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 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, the Social Security Administration (SSA), and the Internal Revenue Service (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. When the NCSSSA budget allows, as determined by the NCSSSA Executive Committee, the Training Committee will calendar events for the new Conference Year. Training may be conducted in person or virtually and offered on a regional basis with extended (day and one half) training. Such training may include representatives from the Training Committee, IRS, SSA Regional Office, SSA Office

of General Counsel, and SSA Policy Office and will focus on basic roles, responsibilities, terminology, and practices. When practical, such training may be customized to those registered trainees. The Training Committee, under the direction of the Training Committee Chair, will devise appropriate training topics which may include:

- A. Basic Training may be offered to all NCSSSA State Administrators as needed. The focus of such training will be for new or inexperienced State Administrators.
 - i. Costs of travel for IRS, SSA, and state attendees (trainees) shall be borne by the individual participants.
 - ii. Costs estimates for NCSSSA training members shall be approved in advance by the NCSSSA President, according to the NCSSSA Travel Policy.
 - B. Intermediate Training may be offered to all NCSSSA members as needed. The focus of such training will be for those State Administrators with experience beyond the Basic Training level. Intermediate Training may be conducted via webinar, teleconference, or other such means, and shall focus on topics of interest to membership.
 - C. Advanced Training may be offered to all NCSSSA members as needed. The focus of such training will be for those state administrators with advanced experience.
 - D. Training may be conducted via webinar, teleconference, or other such means, and shall focus on systemic problem solving.
4. 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 may submit resolution requests to the Resolution Committee for those individuals providing such assistance.
5. 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 website a best practices treatise on succession planning to include, but not be 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.
6. Training services shall be made available to all state administrator and staff for a fee set by the NCSSSA. Training services may 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 Executive Committee.

Universal Committee Requirement

Important additional responsibilities and requirements for this Committee Chair and members are included in the Policy and are a part of this SOP and a duty of this Committee.