
Pension Strategy and Social Insurance Coordination: Employer Planning for Workforce Exit Course

24 – 28 May 2027

Dubai - Marriott Hotel Al Jaddaf, Dubai





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Programme Summary

Pension strategy and social insurance coordination, covering employer schemes, state benefits and workforce exit, is the subject of this one-week training course for HR and benefits directors, scheme trustees and workforce planning leaders at a strategic level, ending in a workforce exit pension plan for one employer. Late exit planning leaves funding gaps, delayed claims and lost knowledge. The programme moves from benefit architecture and diagnosis of workforce and entitlement risk, through scheme governance and benefit options, to coordination with state benefits, then to a worked plan. Mars Training Centre UK delivers this programme in pension strategy and social insurance coordination.

The Business Case

When pension decisions, state benefit claims and workforce planning sit with separate teams, employers learn of exit waves and funding gaps too late. Leaders who join these decisions can plan exits in phases and protect critical knowledge.

- Pension Funding Pressure: Eases as exit projections inform contribution and benefit decisions early.
- Claim Delays: Fall as employer records and state benefit timelines are reconciled before each exit.
- Knowledge Loss: Reduces as phased retirement and handover plans are agreed in advance.

Principles and Evidence Base

- ILO Social Security Minimum Standards Convention No. 102: Its minimum standards for old-age benefit, covering protection, benefit level and entitlement conditions, structure Session 1.
- ILO Social Protection Floors Recommendation No. 202: Its social protection floor concept frames the benefit layers mapped in Session 1.
- OECD Pensions at a Glance: Its indicators on system design, entitlements and retirement system finances guide the diagnosis in Session 2.

Intended Participants

- Benefits directors who design and explain employer pension and retirement arrangements.
- Scheme trustees who set funding, investment and benefit decisions.
- Workforce planning leaders who forecast exits and succession needs.
- HR leaders who coordinate employee claims and exit conversations with state benefit bodies.

The programme serves large employers, public bodies, banks and industrial groups.



Learning Outcomes

1. Participants will be able to evaluate employer pension arrangements against recognised minimum standards for old-age benefit.
2. Participants will be able to diagnose exit waves, entitlement rules and funding gaps from workforce data.
3. Participants will be able to construct a scheme governance charter with clear decision rights.
4. Participants will be able to appraise benefit options by cost and member impact.
5. Participants will be able to design a coordination routine between employer actions and state benefit claims.
6. Participants will be able to justify a phased exit plan and its indicators to a board or trustees.

Programme Structure

Day 1: Pension Strategy Principles and Benefit Architecture

What do employer pension promises owe workers, and how do state benefits fit around them?

- ILO Convention No. 102 Old-Age Benefit Review
- ILO Recommendation No. 202 Protection Floor Brief
- Pension Promise and Benefit Layer Map
- Employer Scheme and State Benefit Interface Chart
- OECD Pensions at a Glance Indicator Review

Day 2: Diagnosing Workforce Age Profile and Entitlement Risk

Where do exits, entitlements and funding pressures build up unseen?

- Workforce Age and Exit Projection
- Entitlement Eligibility Rule Audit
- Pension Liability and Funding Gap Review
- Early Exit and Arduous Work Case Review
- Member Record and Data Gap Check

Day 3: Designing Scheme Governance and Benefit Options

How are scheme decisions made, costed and explained to members?

- Scheme Governance Charter
- Trustee Decision Rights Matrix
- Benefit Option and Cost Comparison
- Contribution and Funding Rule Sheet
- Member Communication Plan



Day 4: Coordinating Social Insurance and Workforce Transition

How do employer actions and state benefit claims line up for each leaver?

- Social Insurance Contribution Reconciliation
- Benefit Claim Timeline Planner
- Phased Retirement and Handover Plan
- Knowledge Transfer Register
- Exit Counselling Protocol

Day 5: Applying Pension Strategy and Social Insurance Coordination in One Employer

Is the workforce exit plan ready for a board or trustees to adopt?

- Applying the Session 2 Projection to the Chosen Employer
- Testing Session 3 Options Against Funding Rules
- Matching Session 4 Claim Timelines to Exit Cases
- Setting Review Indicators for the Plan
- Completing the Workforce Exit Pension Plan

Methodology

The programme is built around case analysis and data workshops on anonymised workforce and scheme records from banking, public sector and industrial settings. Participants work in small teams as a benefits director, a trustee and a workforce planner.

- Suggested activity: Projecting five years of exits from an age profile and noting funding pressure points.
- Suggested activity: Comparing two benefit options for cost and member impact.
- Suggested activity: Sequencing the claim steps for one leaver so no deadline is missed.

Capstone Output

Each participant completes a workforce exit pension plan for one employer. It holds an exit projection, a benefit layer map, a governance charter, a benefit option comparison, a claim coordination timeline and review indicators. The plan is used to brief a board or trustees.

Frequently Asked Questions

Is pension strategy and social insurance coordination suitable for leaders who are not actuaries?

Yes. Pension strategy and social insurance coordination is set at strategic level and assumes you read scheme and workforce reports, not that you hold an actuarial qualification.



Which standards does pension strategy and social insurance coordination rest on in this training?

Pension strategy and social insurance coordination rests on ILO Convention No. 102 and Recommendation No. 202, with OECD Pensions at a Glance indicators guiding diagnosis.

How is the plan from pension strategy and social insurance coordination used at work?

You use the pension strategy and social insurance coordination plan to brief a board or trustees, schedule phased exits and set review points for claims.

How does pension strategy and social insurance coordination differ from a programme on compensation design?

Pension strategy and social insurance coordination centres on retirement benefits, state entitlements and exit planning, while a compensation programme centres on pay structures and incentives.