

## **SUPPORT FOR THE INSTITUTE'S QUALIFICATION ACTIVITIES**

This paper outlines specific ways in which you can support the Institute's qualification provision both regionally and through activities run from PMI House. This document provides an overview of the areas where support from the industry is needed and I hope that you will also register your interest in finding out more information about any of these areas by completing and returning the PMI Qualification Support Register form. We do rely very much on the technical expertise of those working within the industry so please consider getting involved in ensuring tomorrow's pensions professional is supported by you today.

PMI offers a range of qualifications:

- **Advanced Diploma in Retirement Provision (ADRP)** - a comprehensive and in-depth qualification for retirement benefit professionals
- **Diploma in Pensions Administration (DPA)** – a workbased qualification for the more experienced pension scheme administrator working with DB and/or DC schemes
- **Diploma in International Employee Benefits (DIEB)** a qualification offered in partnership with the International Employee Benefits Association (IEBA)
- **Diploma in Regulated Retirement Advice (DRRA)** – designed to meet the FSA appropriate examination standards for Retail Distribution Review (RDR) purposes
- **Diploma in Employee Benefits and Retirement Savings (DEBRS)** – a qualification designed to provide a comprehensive background to UK employee benefits and savings
- **Retirement Provision Certificate (RPC)**, a qualification that provides a broad introduction to pensions and other related benefits in the UK
- **Certificate in Pension Calculations (CPC)** – a qualification that assesses the ability to perform manual calculations of benefits for both DC and DB pension schemes
- **Certificate in Pensions Essentials (CPE)** – a qualification that is delivered and assessed 'in-house' to support the internal training and development of employees
- **Certificate in Pensions Administration (CPA)** – a workbased qualification for pension scheme administrators working with DB and/or DC pension schemes
- **Award in Pensions Essentials (APE)** - – a qualification that is delivered and assessed 'in-house' to support the internal training of new employees
- **Awards in Pension Trusteeship (APT)** - gives formal recognition of the individual trustee's pension knowledge.

### **Advanced Diploma in Retirement Provision (ADRP), Diploma in Employee Benefits and Retirement Savings (DEBRS), Diploma In International Employee Benefits (DIEB) and Diploma in Regulated Retirement Advice (DRRA):**

#### **Distance Learning Course Tutor**

The on-line courses run from September to mid March for April examinations and May to September for October examinations. Tutors can select which module(s) they are interested in working with and are supplied with full notes and instructions on the role, study material, course assignments and notes. The system is web based. Tutors on average take on 10 Students who will complete a series of assignments over the months. The Institute asks for assignments to be marked and returned within two weeks of receipt. Marking fees are paid at the rate of £5 per assignment.

#### **Assistant Examiner**

Assistant examiners work as part of a team for the module and mark two bundles of a maximum of 30 examination scripts. Meetings of the team are held immediately after the examinations have taken place and at the conclusion of the marking period. Attendance at these meetings is essential. Assistant examiners receive copies of all the study material for the module, a marking schedule for the examination, and the support of the Principal and Senior examiners in the team. A fee of £5 per script marked is paid.

It is not possible to act as both a tutor and an examiner in the same module in any one year.

## **Certificate in Pensions Administration (CPA), Diploma in Pensions Administration (DPA)**

### **External verifiers**

Diploma in Pensions Administration (DPA) and Certificate in Pensions Administration (CPA) are operated in approved centres, these are employers who have agreed to run the qualifications for their staff.

External Verifiers are responsible for recommending whether new centres should be approved and for monitoring the operation of existing centres to ensure that assessment is consistent. They do this through regular visits to their centres. A minimum of one annual visit is required but this may vary according to the size of the centre. External Verifiers have to submit a report to PMI on every visit. An honorarium of between £100 and 200 is paid per visit + travel expenses.

Training is provided, initially a one-day training course and external verifiers are expected to attend update meetings held annually. External Verifiers must have the assessor qualification and/or the internal verifier qualification and be prepared to gain a certificate of competence in external verification (via PMI) within 12 months of beginning to externally verify. Support will be provided to allow them to do this.

## **Certificate in Pensions Administration (CPA), Diploma in Pensions Administration (DPA), Certificate in Pension Calculations (CPC)**

### **Examiners**

Help is also needed with the benefit calculation case study examination marking in late May/early June and in early November. Examiners are asked to mark about 50 scripts and are provided with a complete marker's pack including the worked answers and marking schedule. They also have the support of a Senior Examiner. A fee is paid for each script marked. Attendance at meetings is not required as all briefings are by post.

### **Online Learning Author or Checker**

PMI offers an internet based learning tool which helps candidates to prepare for the case study examinations that are part of a number of VQ qualifications by providing up-to-date information and sample case study questions

Authors – write/update the content for each examined area as well as writing the case study practice questions and full working answers. These reflect the actual examination questions and should provide sufficient range to cover the syllabus requirements.

Checkers – are allocated a specific set of case studies that have been produced by an author and check through all of the case studies and worked answers

There is an honorarium payment for each role.

## **The Awards in Pension Trusteeships (APT)**

### **Question Writers**

The Awards in Pension Trusteeships examinations are in the form of multiple choice items designed to test knowledge across the syllabus.

Help is needed to write multiple choice items which are reviewed by the APT Committee and if accepted retained in a question bank.

Question writers are provided with an information pack to aid writing and will be paid a small fee for each question accepted into the question bank.

## **The Award in Pensions Essentials (APE) and The Certificate in Pensions Essentials (CPE)**

These qualifications follow specific learning outcome requirements set by PMI and are carried out in-house on a when needed basis. The content, assessment (written question and answer) are all set in-house.

### **Train/Tutor (Freelance)**

If you wanted to offer training and development plus assessment for one or both of these qualifications to an employer then please let us know. We will put your details as a link on our website so that you can be contacted directly by an employer and you can set your own terms and conditions directly with them.

For further information on all of the above please contact qualifications on 020 7392 7400 or email [qualifications@pensions-pmi.org.uk](mailto:qualifications@pensions-pmi.org.uk)

### **Regional Groups**

PMI Regional Groups need assistance from qualified members who are prepared to give local support to students. This may be acting as a mentor, giving revision course sessions or speaking at meetings.

For further information on this please contact the membership department on 020 7372 7413 or e-mail [membership@pensions-pmi.org.uk](mailto:membership@pensions-pmi.org.uk)

### **Confidentiality/Conflict of Interest Policy (Qualifications)**

As part of PMI Governance arrangements, PMI Risk Committee asks that all individuals involved in examination and assessment related activities should be familiar with our policies on confidentiality and conflict of interest.

Furthermore, all such individuals should complete a conflict register and agree to abide by the data security and confidentiality protocols.

Therefore, each year and when a new member of the centre's assessment team comes on board everyone involved with qualifications will be asked to complete and return the PMI declarations as soon as possible and/or update them as required.

### **Recognition of Conflicts of Interest**

It is the responsibility of each individual:

To recognise situations in which he or she has a conflict of interest, or might reasonably be seen by others to have a conflict;

- to disclose that conflict;
- to take such further steps as may be appropriate;
- to record in writing in the Conflicts Register and in the minutes of the meeting details of the conflict and of how it has been addressed.

If you have any queries on these policies please contact Neil Scott, Head of Professional Standards [nscott@pensions-pmi.org.uk](mailto:nscott@pensions-pmi.org.uk) or via telephone on 020 7392 7402

March 2013