

PMI Accredited Training Partner Application and Agreement Form

Date of Application:

This form serves as both an application for 'PMI Accredited Training Partner' status and a binding agreement upon approval by PMI. By completing and submitting this form, the applicant organisation agrees to comply with all standards, criteria, fees, and obligations outlined in the PMI Education Standards for Vocational and Bespoke Qualifications (effective from January 2026).

The PMI reserves the right to review, approve, or reject applications based on the provided information and any supporting evidence. Upon approval, this agreement will govern the relationship between the PMI and the Accredited Training Partner (ATP).

Section 1: Organisation Details

Organisation Name:

Registered Address:

Company Registration Number (if applicable):

Contact Person

Full name:

Job title:

Email address:

Telephone number:

Type of Organisation:

- Independent Training Provider (ITP)
- Employer in the Pensions Sector
- Other (please specify): [Description]

Intended Scope of Delivery:

- Internal training and assessment for learners within own organisation only
- Internal and external training and assessment for learners within own organisation and external organisations

PMI Qualifications to be Delivered (select all that apply):

- Award in Pensions Essentials (APE) - Level 2 (Unregulated)
- Certificate in Pensions Essentials (CPE) - Level 3 (Unregulated)
- Certificate in Pensions Administration (CPA) - Level 3 (Unregulated)
- Diploma in Pensions Administration (DPA) - Level 4 (Unregulated)
- Bespoke qualifications approved by the PMI (please specify):

Number of Anticipated Learners per Year:

Satellite or Sub-Contracted Centres (if applicable):

Section 2: Compliance with PMI Accredited Training Partner Criteria

To achieve PMI Accredited Training Partner status, the applicant must meet all essential criteria (EC), staff qualifications (SQ), and industry experience (IE) standards. Please confirm compliance by checking the boxes below and provide brief evidence or references to supporting documents (e.g., policies, systems, CVs). Supporting evidence must be attached or submitted separately.

The PMI will conduct External Quality Assurance (EQA) checks, including potential external verification visits, to verify compliance.

Essential Criteria (EC)

Standard	Criteria	Description	Compliant (✓)	Evidence Provided
Access to Learning	EC1.1	Learners have access to a dedicated, online learning portal.	<input type="checkbox"/>	
Access to Tutor Support	EC2.1	Responses to a request for Tutor support are received within 48 hours (excluding weekends).	<input type="checkbox"/>	
Access to Technical Support	EC3.1	Responses to a request for technical support are received within 24 hours (excluding weekends).	<input type="checkbox"/>	
Learning Technologies	EC4.1	Learners have access to learning materials which enable independent/self-study.	<input type="checkbox"/>	
Learning Technologies	EC4.2	Where a portfolio of evidence is required as part of qualification assessment, a digital system must be provided.	<input type="checkbox"/>	

Standard	Criteria	Description	Compliant (✓)	Evidence Provided
Assessment and Assessment Feedback	EC5.1	Where multiple choice questions (MCQs) are an approved examination method for a qualification, digital MCQs are provided within learning.	<input type="checkbox"/>	
Assessment and Assessment Feedback	EC5.2	Mock exams are provided where formal examinations are required to complete a course and achieve a qualification.	<input type="checkbox"/>	
Assessment and Assessment Feedback	EC5.3	Feedback for ALL assessments, mock or formal (excluding PMI exams), are received by the learner within 48 hours (excluding weekends).	<input type="checkbox"/>	
Learning Materials	EC6.1	ALL Learning materials are provided in two or more alternative formats (e.g., Text (PowerPoint, Word, PDF, etc.), Video, Audio, Interactive eLearning).	<input type="checkbox"/>	
Learner Progress and Reporting	EC7.1	Learner progress is tracked in relation to deadlines set at the start of their course (Behind / On track / Ahead).	<input type="checkbox"/>	

Standard	Criteria	Description	Compliant (✓)	Evidence Provided
Learner Progress and Reporting	EC7.2	Distance travelled is reported (starting points and confirmed end points).	<input type="checkbox"/>	
Learning Experience	EC8.1	Course feedback is obtained from all learners upon successful completion/withdrawal.	<input type="checkbox"/>	
EP/AC Qualifications	EC9.1	An ATP has sufficiently qualified education professionals involved in the delivery of PMI qualifications.	<input type="checkbox"/>	
EP/AC Qualifications	EC9.2	CVs are available for all staff involved in the delivery of PMI qualifications.	<input type="checkbox"/>	
Standardisation Training	EC10.1	Evidence of regular standardisation training for BOTH Teachers/Tutors and Quality Assurance team members.	<input type="checkbox"/>	

Staff Qualifications (SQ)

Standard	Criteria	Description	Compliant (✓)	Evidence Provided
Qualifications	SQ1.1	At least one member of the delivery team is assessor qualified.	<input type="checkbox"/>	
Qualifications	SQ1.2	At least one member of the delivery team has achieved the PMI Qualification they are teaching or a higher level qualification in the same field OR has a teaching qualification.	<input type="checkbox"/>	

Industry Experience (IE) - Required if SQ1.2 is not met

Standard	Criteria	Description	Compliant (✓)	Evidence Provided
Subject Matter Expert / Industry Experience	IE1.1	Working or has worked as a Pensions administrator, trustee or consultant.	<input type="checkbox"/>	
Subject Matter Expert / Industry Experience	IE1.2	Practical experience in pension scheme administration or advisory services, with at least 1-2 years in roles involving scheme operations, member services, or client support.	<input type="checkbox"/>	

Standard	Criteria	Description	Compliant (✓)	Evidence Provided
Subject Matter Expert / Industry Experience	IE1.3	Knowledge of pensions-related regulatory frameworks, evidenced by experience applying basic regulations (e.g., TPR guidelines or equivalent) or holding relevant qualifications (e.g., PMI Award in Pensions Essentials/Certificate in Pensions Essentials or similar).	<input type="checkbox"/>	

Attachment of Evidence: I confirm that supporting evidence (e.g., CVs, policies, system screenshots) is attached or will be provided upon request.

Section 3: Fees and Payment Agreement

Billing is annual and applicable on April 1st, 2026 (or the closest date possible). All fees are in GBP (£) and exclusive of VAT where applicable.

- **Annual Accredited Training Partner Fee:** £1,000
- **Learner Registration and Certification:** Included in Student membership
- **Accredited Training Partner Satellite (if applicable):** £400 (annually per satellite)
- **External Verification Visit (if required):** £200 (per visit)
- **PMI Accredited Course Compliance Visit (for new accredited qualifications):** £500 (annually)
 - For each additional PMI Accredited Course: £300 (annually)

Payment Terms: Payment is due within 30 days of invoice issuance. The PMI reserves the right to suspend or revoke ATP status for non-payment.

I agree to the fees and payment terms outlined above.

Section 4: Marketing, Advertising, and Course Design Agreement

The applicant agrees to adhere to all mandatory requirements for PMI Accredited Courses, including but not limited to:

- No advertisement of the course as part of PMI's Accredited Course provision until approval is granted. No use of PMI logos or references without approval.
- Use of full approved course titles only. "PMI" must not feature in the advertised title; references to PMI are limited to certification only.
- No marketing that misleads learners into believing the course is regulated or nationally recognised. All marketing must:
 1. Clearly feature the phrase 'accredited course' and specify the type.
 2. Include an explanation of what an accredited course is.
 3. Not refer to the course as 'regulated' or 'nationally recognised.'
- No comparison of accredited courses to regulated qualifications or implication of equivalence. No statements implying the course meets industry standards for employment.
- Upon removal of approval, all PMI-referencing advertisements must cease immediately.
- Fees must be transparent and available to learners prior to commitment.
- Notify PMI of all marketing activities, including third-party websites, social media, and sub-contracted centers/satellites. Failure to comply may result in revocation of status.

The applicant further agrees to comply with Ofqual General Conditions of Recognition (GCOR) B5.1 and B5.2 regarding statements and advertising of unregulated qualifications.

I confirm understanding and agreement to all marketing, advertising, and course design requirements.

Section 5: Quality Assurance and Monitoring Agreement

The applicant agrees to participate in PMI's External Quality Assurance processes, including:

- Annual reviews of PMI Accredited Course status.
- External verification visits as outlined (pre-visit planning, initial meetings, sample reviews, interviews, observations, feedback, reporting, and follow-up).
- Provision of access to learner portfolios, assessment decisions, staff, and facilities as required.
- Implementation of any required actions or improvements within specified deadlines.

PMI Accredited Course status applies to both regulated (courses of learning only) and unregulated (courses of learning and internal assessment) qualifications.

I agree to comply with all quality assurance and monitoring processes.

Section 6: General Terms and Conditions

1. **Duration:** This agreement commences upon PMI approval and is renewable annually, subject to review and payment of fees.
 2. **Termination:** Either party may terminate with 90 days' written notice. PMI may terminate immediately for non-compliance, non-payment, or breach of terms. Upon termination, all use of PMI branding and delivery of PMI courses must cease.
 3. **Confidentiality:** Both parties agree to maintain confidentiality of proprietary information.
 4. **Liability:** The PMI shall not be liable for any losses arising from the applicant's delivery of courses. The applicant indemnifies PMI against claims related to their operations.
 5. **Governing Law:** This agreement is governed by the laws of England and Wales.
 6. **Amendments:** Any changes must be in writing and signed by both parties.
 7. **Force Majeure:** Neither party is liable for delays due to events beyond reasonable control.
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Section 7: Declaration and Signature

I, the undersigned, declare that the information provided is true and accurate. The organisation agrees to abide by all terms, criteria, and obligations in this application/agreement and the PMI Education Standards document. We understand that PMI Accredited Training Partner status is subject to ongoing compliance and may be revoked if standards are not maintained.

Authorised Signatory

Full name

Job title

Signature

Date

PMI Approval (For PMI Use Only):

PMI Representative Name

Signature

Date

Please submit this completed form, along with any supporting evidence, to:
PMIQualifications@pensions-pmi.org.uk