



Pensions
Management
Institute

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THE PENSIONS MANAGEMENT INSTITUTE

Workplace Pensions Trailblazer Apprenticeship – Notes for Prospective End-point Assessors

Introduction

The Workplace Pensions Trailblazer Apprenticeship is an entry level apprenticeship and includes options for aspiring administrators and consultants. A defining feature of trailblazer apprenticeship is that each standard has an employer designed synoptic End-point Assessment. The End-point Assessment is separate to any qualifications or other assessment that the apprentice may undertake during training. The apprentice will not be able to complete the apprenticeship without passing the End-point Assessment. PMI is an End-point Assessment Organisation and has been approved to conduct independent end point assessment of apprentices. End-point Assessors are individuals engaged by PMI to undertake end-point assessment in accordance with the relevant guidelines, this includes:

- conduct End-point Assessment of apprentices in line with the assessment plan
- quality assure the End-point Assessments they deliver
- adhere to the external quality assurance arrangements set out in the assessment plan
- ensure End-point Assessment is synoptic and independent, in line with the assessment plan
- identify and record when the apprentice has passed the End-point Assessment

Eligibility

PMI recruits volunteers to become End-point Assessors from within the qualified membership (or equivalent).

To be eligible for consideration as an End-point Assessor for the PMI an individual must:

- possess a relevant occupational background.
- be a member of the PMI (or equivalent). We would expect those assessing the administration option to be at least Diploma Members [with an administration focussed qualification] and those assessing the consultant option to be Associate members. All End-point Assessors will be subject to the PMI Code of Professional Conduct and will be required to undertake Continuing Professional Development (CPD).
- have up-to-date working knowledge of pensions practice covered by the standard.

Desirable: Previous experience in assessment or verification and relevant qualifications.

Applications

An application form has been created to gather details of prospective assessors. This form is used to inform the training and induction process.

Induction/Training

All new End-point Assessors must attend an initial induction. This will cover:

- the main features of the standard;
- an overview of the qualifications included within the standard;
- the assessment process;
- carrying out assessment activity;
- what good looks like and what a distinction looks like;
- the role of a moderator;
- the moderation procedure and summaries of moderation activities;



- operational procedures and completing assessment reports.

Level of Commitment

We anticipate a high degree of flexibility round the volume of work for this role. As a new development we are expecting demand for assessors to gradually increase from 2017 onwards.

Probably the minimum for the assessor role would be 1 or 2 days training per year + 1-2 days per assessment. Some of the assessment work could be done outside of normal working hours if necessary. The minimum number of assessments per assessor is subject to demand and operational requirements – we are expecting only small numbers initially.

Confidentiality

It is important that strict confidentiality is maintained in this process. PMI's Confidentiality Policy should be applied as appropriate.

Conflict of Interest

All End-point Assessors are subject to PMI's Conflict of Interest Policy and will be required to complete a Conflict of Interest declaration.

Remuneration

End-point Assessors may claim expenses for attending a training day, update meetings, workshops and candidate visits. An honorarium is paid for each assessment and travel expenses incurred.

The situation in respect of Income Tax is set out on a separate sheet.

Continuing Professional Development (CPD)

This work is relevant for CPD purposes.

Further Information

There are a number of sources of further information on different aspects of this role:

- Workplace Pensions (Administrator or Consultant) – Level 3 Standard
- Workplace Pensions (Administrator or Consultant) – Level 3 Assessment Plan
- Workplace Pensions (Administrator or Consultant) – Level 3 Assessment Criteria and Portfolio content
- Guidance for End-point Assessors
- End-point Assessor Application Form

These can be found on the PMI website: <http://www.pensions-pmi.org.uk/qualifications-and-learning/pmi-and-apprenticeships/>