



Pensions Management Institute

Accredited Training Partner - 2026

A guide to becoming a 'PMI Accredited Training Partner' for PMI Examination Partners and Approved Centres.

Introduction

The PMI offers two types of qualifications;

- **Regulated:** Qualifications which are developed and awarded by the PMI and are registered on the OFQUAL Registered Qualification Framework (RQF).
- **Unregulated:** Qualifications which are developed and awarded by the PMI, but which are not registered on the OFQUAL Registered Qualification Framework (RQF).

The distinction between the two is in relation to **assessment for regulated qualifications** – only the PMI is permitted to conduct summative and/or formative assessment for regulated qualifications.

For unregulated qualifications, Examination Partners and Approved Centres are authorised to conduct assessments, such as is the case with the PMI Level 2 Award in Pension Essentials (APE) and other PMI Vocational and Bespoke Qualifications.

The PMI currently authorises with two types of external training partners;

- **Examination Partner (EP):** The ability to offer and deliver internal training for PMI unregulated qualifications, and to conduct internal assessment to learners **within their own organisation**.
- **Approved Centre (AC):** The ability to offer and deliver internal training for PMI unregulated qualifications, and to conduct internal assessment to learners both **within their own organisation and for external organisations**.

From January 2026:

1. the PMI will be removing the categories of Examination Partner and Approved Centre, and replacing them with a single category of 'PMI Accredited Training Partner'.
2. the PMI will apply a new set of monitoring standards for its PMI Accredited Training Partners.

The standards used to assess eligibility to become a PMI Accredited Training Partner aim to ensure that every learner undertaking a PMI qualification, regulated or unregulated, can expect to receive a consistent learning experience which caters for a diverse range of learning requirements and preferences.

The 'PMI Accredited Training Partner' status provides an opportunity for Independent training providers (ITPs) and employers in the sector, to accredit their internal training and which aims to support and enhance industry training and development needs.

PMI Accredited Course

“A PMI Accredited Course allows PMI Accredited Training Partners to deliver bespoke courses of learning/training that supports the achievement of both regulated and unregulated qualifications, offered by the PMI.”

An Accredited Course is developed by an Accredited Training Partner, rather than the PMI. The PMI does not contribute to its development, nor the development of the course content, and it isn't reviewed against Ofqual criteria where applicable. Every centre that is approved to deliver an Accredited Course goes through rigorous External Quality Assurance (EQA) checks, meaning a PMI Accredited Course delivers excellent quality to learners in preparation for the sitting of examinations and/or the awarding of a Certificate.

The PMI offers one type of accreditation – **PMI Accredited Course**.

PMI qualifications which can be awarded PMI Accredited Course status

Qualification title	Qualification acronym	Qualification level*	Regulated or unregulated
Award in Pensions Essentials	APE	2	Unregulated
Certificate in Pensions Essentials	CPE	3	Unregulated
Certificate in Pensions Administration	CPA	3	Unregulated
Diploma in Pensions Administration	DPA	4	Unregulated
Bespoke qualifications approved by the PMI			

**Unregulated qualifications are assigned a level of RQF equivalence.*

PMI Accredited Training Partner Criteria

To achieve 'PMI Accredited Training Provider' status,

The criteria required to be met for achieving the necessary standard to be awarded the status of a **PMI Accredited Training Provider** are;

Standard	Criteria	Criteria	Achieved
Access to learning	EC1.1	Learners have access to a dedicated, online learning portal	
Access to Tutor support	EC2.1	Responses to a request for Tutor support are received within 48 hours (excluding weekends) .	
Access to Technical support	EC3.1	Responses to a request for technical support are received within 24 hours (excluding weekends) .	
Learning technologies	EC4.1	Learners have access to learning materials which enable independent/self-study .	
	EC4.2	Where a portfolio of evidence is required as part of qualification assessment, a digital system must be 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.	
	EC5.2	Mock exams are provided where formal examinations are required to complete a course and achieve a qualification.	
	EC5.3	Feedback for ALL assessments, mock or formal (excluding PMI exams), are received by the learner within 48 hours (excluding weekends) .	
Learning materials	EC6.1	ALL Learning materials are provided in two or more alternative formats;	
	EC6.1.1	<i>Text (PowerPoint, Word, PDF, etc)</i>	
	EC6.1.2	<i>Video</i>	
	EC6.1.3	<i>Audio</i>	
	EC6.1.4	<i>Interactive eLearning</i>	
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).	
	EC7.2	Distance travelled is reported (starting points and confirmed end points)	
Learning experience	EC8.1	Course feedback is obtained from all learners upon successful completion/withdrawal.	
EP/AC Qualifications	EC9.1	An ATP has sufficiently qualified education professionals involved in the delivery of PMI qualifications.	
	EC9.2	CV's are available for all staff involved in the delivery of PMI qualifications.	
Standardisation Training	EC10.1	Evidence of regular standardisation training for BOTH Teachers/Tutors and Quality Assurance team members.	

Delivery Team/Quality Assurance Team Qualifications

Standard	Criteria	Minimum qualification requirements	Achieved
Qualifications	SQ1.1	At least one member of the delivery team is assessor qualified	
	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	

Delivery Team/Quality Assurance Team Experience

If SQ1.2 isn't met, please refer to the criteria below:

Standard	Criteria	Minimum qualification requirements	Achieved
Subject matter expert / Industry Experience	IE1.1	Working or has worked as a Pensions administrator, trustee or consultant	
	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	
	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)	

Fees and Pricing

Billing is annual and on applicable on **April 1st 2026** (or the closest date possible)

- Annual Accredited Training Partner fee: **£1000**
- Learner Registration and certification: **Included in Student membership**

Additional fees:

- Accredited Training Partner Satellite: £400 (annually)
- External verification visit: £200 (per visit)

For any new accredited qualifications:

- PMI Accredited Course compliance visit: £500 (annually)
 - For each additional PMI Accredited Course: £300 (annually)

The fees cover the PMI's commitment to support your organisation to remain effective in supporting the teaching towards the achievement of our qualifications, and includes;

- Endorsement from the leading Pensions qualification awarding organisation
- Robust quality assurance
- Timely support
- Guidance and feedback for accredited provision.

Important considerations with course design.

Course advertising

As an Ofqual-regulated awarding body, the PMI is subject to the General Conditions of Recognition (GCOR). For the most part, the Conditions relate to regulated qualifications but there are conditions which refer directly to unregulated qualifications:

"Statements regarding qualifications which are not regulated qualifications

B5.1 *An awarding organisation must not (and must take all reasonable steps to ensure that any person connected with it does not) make any statement that would be likely to lead Users of qualifications to believe that a qualification it makes available is a regulated qualification when it is not a regulated qualification."*

"Advertising and promotion of qualifications

B5.2 *An awarding organisation must not (and must take all reasonable steps to ensure that any person connected with it does not) advertise or promote its qualifications in a manner that is likely to be misleading to Users of qualifications." These conditions prevent learners from being misled into thinking an Accredited Course is a nationally recognised regulated qualification".*

Mandatory requirements for application for 'PMI Accredited Course' status

To ensure clarity for learners for what these courses provide upon completion;

- No advertisement of the course as part of PMI's Accredited Course provision must take place until the approval process has been completed. This includes any reference to the PMI or the use of PMI logos.
- Full Course titles agreed to as part of the approved application must be used.
- "PMI" must not feature in the advertised title of the qualification. All references to the PMI must only be in relation to our Certification of the course.
- No marketing should mislead a learner into believing that they will be gaining a regulated qualification. 1. All marketing must clearly feature the phrase 'accredited course' and outline which type of accredited course it is. 2. All marketing must feature an explanation of what an accredited course is. 3. All marketing must not refer to the course as 'regulated' or 'nationally recognised.'
- All marketing must not compare an accredited course to any regulated qualification or imply in any way that they are equivalent. 1. All marketing must not

state or imply that an accredited course meets industry standards for employment.

- Upon removal of approval, all advertisement of the course referencing PMI must halt immediately. • Fees must be transparent and available to learners ahead of commitment to the course.

Marketing

The PMI must be made aware of any marketing or website which advertises a 'PMI Accredited Course'. This is inclusive of third-party websites, social media, and any sub-contracted centres or satellites.

It is the responsibility of the Accredited Training Provider to ensure the PMI is aware of such activities. Failure to do so may result in removal of PMI Accredited Course status, and/or Accredited Training Provider Approval status.

Process of Quality Assurance

External verification visits

Stage	Activity	Purpose
1. Pre-Visit Planning	<ul style="list-style-type: none"> - Review provider documentation - Schedule visit - Share visit agenda 	Ensure the EV understands the scope of the visit and the provider is prepared
2. Initial Meeting	<ul style="list-style-type: none"> - Meet with centre coordinator - Clarify objectives - Discuss any issues 	Establish clear communication and expectations
3. Sample Review	<ul style="list-style-type: none"> - Review learner portfolios - Check assessment decisions - Confirm internal quality assurance processes 	Verify consistency, validity, and reliability of assessment decisions
4. Interviews	<ul style="list-style-type: none"> - Speak with assessors - Possibly interview learners and trainers 	Gain insight into assessment practices and learner experience
5. Observation (if applicable)	<ul style="list-style-type: none"> - Observe assessment activities or Assessor meetings 	Validate that assessment practices are being applied correctly
6. Feedback Session	<ul style="list-style-type: none"> - Provide verbal feedback - Highlight strengths and areas for improvement 	Ensure transparency and support provider development
7. Report Writing	<ul style="list-style-type: none"> - Write and submit formal verification report 	Officially document findings, actions required, and recommendations
8. Follow-Up	<ul style="list-style-type: none"> - Set deadlines for actions - Schedule follow-up if needed 	Ensure continuous improvement and compliance

Key Points

- Awarding of the 'PMI Accredited Course' status requires 'PMI Accredited Training Partners' to meet the criteria within each individual course offering.
- PMI Accredited Course Status is reviewed annually against the criteria, and prior to a renewal invite being issued.
- The standards required to achieve PMI Accredited Course status will improve the learning experience and perception of a PMI qualification and/or course of learning. This will increase the confidence within Pensions Organisations and Pension professionals, current and new to industry, that when commencing study on a PMI qualification/course, they will have access to high standard customer service levels and support, a wide range of learning resources in multiple formats, and learning technologies which support their qualification achievement.
- PMI Accredited Course standards apply to both regulated and unregulated qualifications;
 - **Regulated:** Courses of learning only. PMI conducts all relevant summative and formative assessments.
 - **Unregulated:** Courses of learning and internal assessment.
- Applicable from **April 6th, 2026**.