



Draft Preview

DRAFT APPRENTICESHIP ASSESSMENT PLAN FOR THE ACTUARIAL TECHNICIAN APPRENTICESHIP

ST0004/V2

APPRENTICESHIP REFERENCE NUMBER	LEVEL OF THIS APPRENTICESHIP	INTEGRATION
ST0004	4	None

Assessment Plan

Assessment details

Introduction

This Apprenticeship Assessment Plan (AAP) sets out the requirements for the assessment of the Level 4 actuarial technician apprenticeship. It should be read in conjunction with the General Requirements for Apprenticeship Assessment. Where there is conflict between this AAP and the General Requirements, this AAP takes precedence. Assessment organisations must also comply with the relevant regulatory framework for apprenticeship assessment.

It is important that the assessment of apprentices is proportionate, valid, and provides reliable evidence of an apprentice's attainment of the relevant knowledge and skills. As such, assessment organisations must design assessments to ensure:

- employers have confidence that the apprentice has reached the expected performance standard
- apprentices are sufficiently secure in their knowledge and skills, so that they could demonstrate their competence in different contexts (for example, a different workplace)

Assessment Outcomes

The assessment outcomes group and summarise the knowledge and skills that must be demonstrated in assessments. All assessment outcomes must be assessed.

Knowledge and skills statements in **bold** are mandatory and must be assessed in every version of the assessment that is made available.

Assessment Outcome	Mapping
<p>AO1: Data acquisition and interpretation</p> <p>Identifies, obtains, and prepares complete, accurate, and suitable data for actuarial analysis, and interprets findings to address stakeholder needs.</p>	<p>K15, K16</p> <p>S1</p>
<p>AO2: Actuarial analysis and modelling</p> <p>Applies actuarial techniques to build, test, and interpret models, using mathematical and statistical principles to support decision-making.</p>	<p>K1, K2, K3, K17</p> <p>S2, S7</p>
<p>AO3: Digital tools and systems management</p> <p>Uses digital applications and technologies to perform actuarial tasks securely, including data visualisation and system testing.</p>	<p>K4, K6, K12</p> <p>S8</p>
<p>AO4: Stakeholder communication and support</p> <p>Communicates clearly and appropriately for different audiences, and delivers timely, responsive support that manages stakeholder expectations and meets service commitments.</p>	<p>K11, K14</p> <p>S3, S4, S5, S6, S9</p>
<p>AO5: Compliance and professional standards</p> <p>Adheres to regulatory requirements, professional ethics, and maintains awareness of industry trends to ensure compliant and ethical actuarial practice.</p>	<p>K5, K7, K8, K9, K10</p>
<p>AO6: Documentation and audit trail management</p> <p>Maintains clear and accurate internal documentation to provide an identifiable audit trail of decision-making and analysis.</p>	<p>K13</p> <p>S10</p>

Assessment requirements

Assessment organisations must set apprenticeship assessments. Assessment organisations should consider how technology and digital tools can support innovation and efficiency.

Assessment organisations must design apprenticeship assessments to include at least one **professional discussion**.

Any additional assessment(s) must be selected from the following list of methods to ensure the assessment outcomes are met in full:

- **portfolio**
- **question and answer**
- **case study**
- **interview**
- **observation**
- **presentation**
- **knowledge test**

Apprentices may be assessed at any appropriate point during their apprenticeship programme.

Assessments may be designed to allow a centre or training provider to mark assessments. The assessment organisation is responsible for ensuring all assessments are sufficiently reliable and valid, and for the accuracy of any centre or training provider marking.

Performance descriptors

Performance descriptors describe the level of performance required to achieve a pass or distinction grade. Assessment organisations must design assessments that align with these descriptions.

Performance Category	Pass	Distinction
Applied Knowledge	Demonstrates sound application of actuarial knowledge to address well-defined but complex and non-routine problems, reaching appropriate and generally effective outcomes.	Applies actuarial knowledge with confidence and precision, consistently producing high-quality outputs and resolutions in response to well-defined but complex and non-routine problems.
Applied Skills	Identifies and applies suitable actuarial techniques and practical skills to complete actuarial tasks, adapting as necessary to meet requirements. Methods chosen are generally appropriate, with results that meet professional requirements as tasked by senior colleagues.	Adapts and applies actuarial techniques and practical skills with a high degree of flexibility and operational fluency, ensuring that methods are both effective and support quality and efficiency of actuarial service outcomes.
Regulatory and Procedural Awareness	Applies relevant actuarial regulatory requirements, professional standards, and organisational procedures as instructed and with sound judgement, adapting appropriately to varied and occasionally complex situations.	Interprets and applies actuarial regulatory and procedural requirements as instructed with insight and appropriate flexibility, identifying implications and making informed decisions in varied and occasionally complex situations.
Communication and Collaboration	Communicates clearly and collaborates effectively and appropriately with colleagues and	Communicates and collaborates with confidence and insight, tailoring approach to meet diverse

	stakeholders, contributing to responsive actuarial task delivery.	stakeholder needs, contributing to improved actuarial task outcomes.
Information Use and Decision Making	Analyses and interprets relevant actuarial information to make informed judgements, showing a clear awareness of the occupational context and the broader scope of the role.	Analyses, interprets and evaluates information from a range of sources, providing insightful justification for judgements, and demonstrating a strong awareness of broader implications within the actuarial context.
Responsibility and Autonomy	Takes responsibility for actions and decisions within set parameters. Manages own work and contributes to organising work or supporting others, demonstrating adequate awareness of risks and priorities.	Proactively takes responsibility for actions and decisions within set parameters. Manages own work and proactively contributes to organising work or supporting others, independently exercising sound judgement in assessing risks and priorities.

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