



Draft Preview

DRAFT APPRENTICESHIP ASSESSMENT PLAN FOR THE PENSIONS ADMINISTRATOR APPRENTICESHIP

ST0187/V2

APPRENTICESHIP REFERENCE NUMBER	LEVEL OF THIS APPRENTICESHIP	INTEGRATION
ST0187	3	None

Assessment Plan

Assessment details

Introduction

This Apprenticeship Assessment Plan (AAP) sets out the requirements for the assessment of the Level 3 pensions administrator 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: Regulatory, governance and strategic context</p> <p>Demonstrates an understanding of the regulatory environment, organisational strategy, industry context, trustee governance, and environmental, social, and governance (ESG) and equality, diversity, and inclusion (EDI) commitments to support compliant and responsible pensions administration.</p>	<p>K2, K4, K5, K8, K15, K16</p>
<p>AO2: Pension scheme administration and benefit calculations</p> <p>Applies knowledge of pension scheme and plan structures and processes to administer benefits, interpret scheme and plan documentation, and perform accurate benefit calculations in line with quality standards.</p>	<p>K1, K6, K7*</p> <p>S2, S9*</p>
<p>AO3: Digital systems and data security</p> <p>Uses pensions administration software and digital tools to process tasks and maintain records, while applying secure working practices and data protection principles.</p>	<p>K10, K11, K12</p> <p>S7*, S8</p>
<p>AO4: Customer interaction and issue resolution</p> <p>Establishes customer needs, provides relevant information (not advice), resolves queries, and escalates complaints where relevant using appropriate communication channels and problem-solving approaches.</p>	<p>K3*, K9, K13*</p> <p>S1, S3*, S6*</p>
<p>AO5: Continuous improvement, team working, and work management</p> <p>Contributes to organisational improvement by collaborating with colleagues, managing workload effectively, and maintaining accurate administrative records and schedules.</p>	<p>K14, S4*, S5, S10*</p>

(*) Knowledge and skills statements which offer opportunities to develop functional English and maths are identified with an asterisk.

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 a **written assessment containing both short- and long-form answers.**

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

- **professional discussion**
- **portfolio**
- **project**
- **report**
- **presentation**
- **question and answer**

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 pensions administration knowledge, facts, procedures, and ideas across routine and non-routine tasks, completing them to an acceptable standard within familiar but sometimes complex work contexts.	Applies a thorough understanding of pensions administration knowledge, facts, procedures, and ideas to manage and resolve routine and non-routine tasks with discernment and skill, confidently navigating familiar but sometimes complex work contexts.
Applied Skills	Identifies and applies appropriate pensions administration skills, methods, and procedures to complete tasks and address challenges with a reasonable degree of autonomy and effectiveness within set parameters.	Selects and integrates appropriate pensions administration skills, methods, and procedures proactively and resourcefully to complete tasks and address challenges effectively and with minimal oversight, within set parameters.
Regulatory and Procedural Awareness	Applies pensions legislation, regulation, and organisational procedures relevant to the role without error, with some depth of insight and adaptability across routine and non-routine tasks.	Demonstrates informed judgement in interpreting pensions legislation, regulation, and organisational procedures, confidently navigating nuanced issues in practice across routine and non-routine tasks.
Communication and Collaboration	Participates effectively in pensions administration team environments and demonstrates clear communication and customer service skills that support daily	Communicates and adapts confidently to different audiences and team dynamics, taking initiative in delivering customer and colleague interactions to achieve

	operations and service delivery.	service standards and organisational goals.
Information Use and Decision Making	Accurately interprets and actions relevant pensions administration information from a variety of sources to support problem-solving in mostly familiar but sometimes complex work contexts.	Evaluates pensions administration information sources with insight, drawing informed conclusions that improve task outcomes or efficiency in familiar but occasionally complex contexts.
Responsibility and Autonomy	Takes responsibility for completing pensions administration tasks within set parameters and, where relevant, contributes to guiding or supporting others in achieving team outcomes.	Independently initiates pensions administration tasks to be completed within set parameters, demonstrating accountability and responsiveness to emerging priorities or risks, while guiding or supporting others in achieving team outcomes.

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