Administration Careers & Development Working Group

Career Development Toolkit

Getting Started



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PASA

Career Development Toolkit: Getting Started

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Getting Started

Your guide to the PASA Career Pathways framework

For individuals new to the framework – where to begin and what to do.

10 minute read

By the end you'll know which documents are relevant to you, where you sit in the framework, and what three things to do first.

Where this document sits:

PASA Career Pathways comprises nine Job Family Pathways and five Shared Career Pathways Resources.

The Job Family Pathways describe the skills and capability levels for different areas of pensions administration. The shared resources provide practical support for individuals, managers and employers.

Getting Started is one of the Shared Career Pathways Resources. It explains how to identify your job family and capability level and which documents to use next.

1. What is the PASA Career Pathways framework?

The PASA Career Pathways framework provides a common structure for describing roles, capability and development in pensions administration. It groups work in to nine job families and describes four capability levels within each family. You can use it to:

Understand
the skills expected in your current role

Identify
areas for development

Explore
progression within or between job families

A framework for development not assessment

It's a voluntary development resource. It isn't a qualification or a performance appraisal tool.

Progression in different directions

The framework supports both upward progression within a job family and lateral moves between job families. You don't have to manage people or reach a senior title for it to be useful to you.

2. The nine job families – which one is yours?



Find your best fit

Identify the job family which best reflects the main focus of your role. If your work spans two families, choose the dominant one and note the secondary family.

Job family	What it covers
Member operations and casework	Day-to-day administration, calculations and member communications
Technical and subject matter expertise	Deep pensions knowledge, scheme rule interpretation and technical leadership
Quality, assurance and operational risk	Accuracy, consistency, control and compliance across administration services
Client relationship and service management	Service delivery, trustee and sponsor relationships, client outcomes and reporting
Project delivery, transitions and implementation	Delivering change, scheme onboarding, migrations, dashboards and endgame activity
Business change, process improvement and digital	Operating models, processes, systems, data quality and automation
Scheme finance and treasury management	Scheme cashflows, treasury activity, financial controls and statutory reporting
Technology and systems enablement	Systems, platforms, data architecture and digital tools underpin administration
People leadership and operational management	Leading teams, developing capability, setting culture and shaping service strategy



Next step – Get your Job Family Pathway

Once you know your job family, download or request the relevant Job Family Pathway. It sets out the career levels, the skills expected at each level, the learning syllabus and the qualifications aligned with your pathway.

3. The four capability levels – where are you now?

The framework uses four levels. The names vary slightly by job family, but the logic is consistent. Below is the member operations and casework names.

Your Job Family Pathway will confirm the names for your specific family.

Level	What it means	Typical work	You might be here if…
L1 **Foundation practitioner**	Learning the job, working under supervision, building confidence and accuracy	Standard cases with clear steps and guidance available	You are new to the role, or new to this specific job family
L2 **Pensions practitioner**	Owning work independently, good quality and pace, handling standard complexity	Standard cases and some non-standard, escalates appropriately	You handle your own caseload or workload without needing to check before every step
L3 **Senior pensions practitioner**	Handling complex work, supporting quality, coaching others, exercising judgement	Complex cases, exceptions, escalations, peer support	You are the person others come to when they're not sure what to do
L4 **Lead pensions practitioner**	Leading on the hardest work, shaping how things are done, mentoring, cross-team influence	High-risk and complex cases, practice design, systemic improvements	You are improving the way the team works, not just doing the work well yourself

Where are you now?

Compare your work with the capability descriptions and choose the level where your current responsibilities and evidence align most closely. You may sit between levels in some areas.

4. The documents you will use most

You will mainly use three documents: your Job Family Pathway, the Personal Development Record and the Professionalism and Behaviours Framework.

The Professionalism and Behaviours Framework uses five behavioural stages. These complement, but don't replace, the four capability levels in the Job Family Pathways.

Document	What it is	How to use it
Your Job Family Pathway ***(e.g. Member operations and casework)***	Sets out the career pathway, competency model, learning syllabus and qualifications for your job family. Published by PASA, one per job family	Read the section on your current level. Use it in development conversations with your line manager. Check the PMI qualifications section for study routes
Personal Development Record (PDR)	Your personal document for recording your development goals, evidence, learning and progress. Works across all nine job families	Start with Section A (your profile) and Section B (self-assessment). Add to it regularly. Bring it to development conversations with your line manager
Professionalism and Behaviours Framework	The professional behaviours expected of everyone in pensions administration, described at five progressive stages. Works across all nine job families	Read the stage which matches your current role. Pick two or three behaviours to develop, and use them alongside Section B of your Personal Development Record

Start small

You don't have to complete the PDR in one sitting. The most useful approach is to start with your profile and self-assessment, then build the evidence log and goals over time.

5. Five steps to get started

The framework contains several documents, but you don't need to use them all at once. Start with the five steps below and return to the wider guidance as you need it.

1

Identify your job family
Use section 2 to identify the job family which best reflects the main focus of your role

2

Work out your capability level
Use section 3 to identify the capability level which best reflects your role

3

Complete Section A and Section B of your PDR
Fill in your profile. Then work through the self-assessment across all three skill domains. Rate yourself honestly using the four-point scale

4

Set 2–3 goals in Section C
Choose the 2–3 areas where development would make the most difference in the next 3–6 months. Be specific. Use the 70/20/10 columns to plan how you will develop, not just what you want to achieve

5

Share it with your manager
Bring your PDR to your next development conversation. You don't need to have it complete. Even a first draft is enough to start a useful conversation

That's it, you're started

You now know which documents are relevant to you, where you sit within the framework and what to do first.

6. Frequently asked questions



My job title doesn't match any of the titles in my Job Family Pathway.

This is to be expected. Your Job Family Pathway lists illustrative titles only. What matters is the nature of the work, not the title on your contract

Does my employer have to be using this framework?

No. You can use the PDR and the Job Family Pathways independently. They're designed to be useful for individuals regardless of whether their employer has formally adopted the framework





Do I need to get a PMI qualification?

No – qualifications aren't required for progression. But they add credibility, make your capability visible to other employers, and align well with the pathway levels. Your Job Family Pathway maps the most relevant ones to each level

Need more help?

If you're unsure which job family or capability level applies, discuss the descriptions with your manager or a trusted colleague. You can also contact PASA at info@pasa-uk.com

About the Administration and Careers& Development Working Group

Building careers in pensions administration

The Administration Careers & Development Working Group (ACDWG) is focused on raising the profile of pensions administration as a modern, skilled profession and supporting clearer, more visible career development across the industry.

Administration careers now span a broad range of disciplines, including technical pensions knowledge, member services, technology and data, project delivery, operational risk, client relationship management and leadership. The Working Group aims to reflect this breadth and help people recognise the different routes available to build and develop a career in administration.

Creating clearer career pathways

A key focus of the ACDWG is helping individuals understand where they are, where they could go next and the skills they need to develop along the way.

The Group developed PASA's *Building Career Pathways in Pensions Administration* Guidance and is now expanding this work through the Career Development Toolkit. The aim is to provide a common framework for job families, capability and progression, while recognising roles and organisational structures differ across the industry.

Its work also considers how career development can connect with professional learning and qualifications, including PASA's work with the Pensions Management Institute (PMI).

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