Administration Careers & Development Working Group

Career Development Toolkit

Implementing the Framework



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PASA

Career Development Toolkit: Implementing the Framework

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Implementing the Framework

Your guide to adopting PASA Career Pathways in your organisation

For employers, senior operations leaders, HR and learning & development teams and those responsible for development and progression processes.

15 minute read

By the end you'll understand who needs to be involved, how to introduce the framework, where it can fit within existing processes and how to review implementation.

Where this document sits:

PASA Career Pathways consists of nine Job Family Pathways and five Shared Career Pathways Resources. The Job Family Pathways describe the skills, capability levels, learning and qualifications relevant to different areas of pensions administration. The shared resources help individuals, managers and employers use the framework in practice.

1. What adoption involves

Adopting PASA Career Pathways means using it as a common reference point for roles, development and progression. Organisations can integrate it into their existing people processes, they don't need to replace their job architecture, competency framework or HR systems.

Adoption means three things:

Individuals

Identify the job family which best reflects their work and compare their current responsibilities and evidence with the relevant capability levels

Managers

Use the Job Family Pathways and the three skill domains to support development conversations and set clear expectations

Employers

Use consistent evidence standards when making development and progression decisions



Start with a pilot

Organisations can begin with one team or job family, test the approach and extend it once they understand what works. Managers should have the Manager's Guide, while individuals should have Getting Started and the relevant Job Family Pathway.

2. Who should be involved

Implementation can be led by a small group, but responsibility should be clear. The group should include operational leadership, HR or learning and development, line management and employees who will use the framework.

Senior operations sponsor	**Why they're involved** Provides authority and connects implementation to operational priorities	**Their role** Approves the scope, supports communication and resolves issues requiring senior decisions
Implementation lead	**Why they're involved** Maintains oversight of the work	**Their role** Coordinates role mapping, process changes, communication, feedback and review
HR and Learning & Development	**Why they're involved** Owns or supports relevant people, role and learning processes	**Their role** Confirms how the framework will work with existing processes and identifies learning gaps
Line managers and team leaders	**Why they're involved** Will use the framework in development conversations and assessments	**Their role** Tests the guidance, uses the relevant Job Family Pathways and applies agreed evidence standards
Individuals	**Why they're involved** Will use the framework to understand their role and plan their development	**Their role** Tests whether the framework is clear and practical, and provides feedback on its use

Smaller organisation?

One person may cover several of these roles. There should still be a named implementation lead and an operational sponsor. The Manager's Guide can support line managers where there's no dedicated HR or learning and development resource.

3. Suggested implementation sequence



4. Integrating the framework into existing processes

Treating the framework as a separate exercise can create duplication. Organisations should identify where it adds a useful common reference point within existing people and development processes.

Existing process	How to integrate the framework	What to avoid
Job descriptions and role profiles	Reference the relevant job family and, where useful, the capability expected of the role. Use the three skill domains to describe technical, personal effectiveness and behavioural expectations.	Assuming the role's expected capability level automatically determines the current capability of the individual holding it.
Performance and development reviews	Use the relevant Job Family Pathway in the development part of the review. Consider evidence across all three skill domains and distinguish development assessment from the organisation's formal performance-rating process.	Using the framework only at the annual review, or treating a capability level as a substitute for the organisation's performance process.
Development conversations	Use the relevant Job Family Pathway to discuss expectations, evidence and development priorities. Individuals may use the Personal Development Record (PDR) to prepare for the conversation and capture agreed actions.	Requiring managers to complete or maintain the PDR. It belongs to the individual, who decides what to share.
Promotion and progression decisions	Use the relevant capability descriptions and evidence across all three skill domains to inform the decision. Record the basis for the assessment and follow the organisation's normal governance and approval process.	Treating time served, job title, a single technical strength or completion of the PDR as sufficient evidence of readiness.
Induction	Introduce new starters to the relevant job family and Job Family Pathway at an appropriate point during induction. Use relevant syllabus modules to help plan learning.	Giving new starters the full document set without explaining which parts are relevant to their role.
Learning and development planning	Compare existing learning provision with the relevant syllabus modules. Identify genuine gaps and consider formal qualifications where they support the role or the individual's development.	Mapping every available module regardless of relevance, or focusing on technical knowledge without considering personal effectiveness and behavioural development.

5. Reviewing implementation

The time required will depend on the organisation's size, structure and existing processes. These phases are a guide rather than a prescribed timetable.

Preparation	**What to review** Scope, ownership, role mapping and pilot arrangements are agreed	**Evidence** Named sponsor and implementation lead; documented scope; pilot group identified
Pilot	**What to review** Managers and individuals understand the framework and can use the relevant documents	**Evidence** Feedback from users; examples of development conversations; issues and changes recorded
Extension	**What to review** Agreed processes refer to the framework and managers have appropriate support	**Evidence** Updated process documents; manager guidance or briefing completed; learning gaps prioritised
Ongoing review	**What to review** The framework is being used consistently and remains aligned with organisational processes	**Evidence** Sample reviews of assessments and progression decisions; manager and employee feedback; agreed improvements

Keep it useful

Review the approach regularly. The aim is consistent, useful application of the framework, not additional administration or universal use of every document.

6. The PASA Careers Pathways documents

PASA Career Pathways is delivered through two sets of documents: the nine Job Family Pathways, and the five Shared Career Pathways Resources which apply across all of them. All are available here.

Document	Main audience	Purpose
Building Pensions Administration Career Pathways	All audiences	Introduces the framework, nine job families, four capability levels and three skill domains
Getting Started	Individuals new to the framework	Explains how to identify a job family, consider a capability level and choose the documents to use
Job Family Pathways	Individuals and managers	Describe the capability expectations, learning and relevant qualifications for each job family
Personal Development Record	Individuals	An optional personal record of goals, evidence, learning and career direction
Professionalism and Behaviours Framework	Individuals, managers and employers	Describes the shared behavioural standards through five behavioural stages
Manager's Guide	Managers and team leaders	Supports development conversations, capability assessments, progression decisions and mobility discussions
Implementing the Framework	Employers	Supports organisational adoption, role mapping, process integration and review



Not sure where to start?

Individuals should begin with Getting Started and their relevant Job Family Pathway. Managers should also use the Manager's Guide. Employers implementing the framework should use this guide alongside the relevant Job Family Pathways.

7. Frequently asked questions

Do we have to use all nine job families?	No. Start with the job families relevant to the teams in scope. Other job families can be introduced when there is a clear need
What if roles don't fit neatly into one job family?	Identify the job family which best reflects the main purpose of the role and record any significant secondary family. Don't force a blended role into a single classification if it would obscure important responsibilities
We already have a competency framework. Do we need to replace it?	You don't need to replace it. Compare the two frameworks, identify where the PASA language adds value and agree how they will work together. Avoid creating duplicate expectations or assessment processes
We don't have a dedicated L&D resource. Can we still implement this?	The framework can still be used, but responsibility for implementation should be assigned. The Manager's Guide and Getting Started provide practical support, while the relevant Job Family Pathways supply the detailed role and capability content
How long does implementation take?	This will depend on the number of teams involved and the extent of the process changes required. Start with a defined pilot, review the results and agree the timetable for wider use

Getting support

The latest PASA Career Pathways documents are available here. PASA publications, events and webinars may also provide opportunities to learn from other organisations using the framework. Contact PASA if you have a question about the published framework or the support currently available.

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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