Administration Careers & Development Working Group

Career Development Toolkit

Managers Guide



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PASA

Career Development Toolkit: Managers Guide

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Daniel Taylor (Board Sponsor)	**PASA**
Clare Green	**WTW**
Fay Knight	**Brightwell**
Jason Mathew	**LCP**
Martin Wigfield	**Zatori**
Michelle Darby	**People's Partnership**
Nick Walker	**Howden**
Paula Godden	**Aptia**
Vanessa Jackson	**PMI**

Managers Guide

Using PASA Career Pathways to support your team

Managers play an important role in helping individuals use PASA Career Pathways in practice. This guide explains how managers and team leaders can use the framework to support development conversations, discuss capability, consider progression and explore moves between job families.

It's for anyone responsible for supporting the development of people in pensions administration, including team leaders, operations managers and senior professionals with line management responsibilities. It's designed to be used within your organisation's existing development and people processes.

You don't need to be an expert in all nine job families or introduce a new HR process. Start with the Job Family Pathways relevant to your team and use them to support clearer, more consistent development conversations.

20 minute read

By the end you will know how to use Career Pathways to structure development conversations, discuss capability and progression, and support people exploring different career routes.

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.

The Manager's Guide is one of the Shared Career Pathways Resources. Use it alongside the Job Family Pathways relevant to your team and, where an individual chooses to share it, their Personal Development Record.

1. Understanding the framework



The framework organises roles in pensions administration into nine job families, each representing a distinct area of work and a set of related skills:

1. Member operations and casework
2. Technical and subject matter expertise
3. Quality, assurance and operational risk
4. Client relationship and service management
5. Project delivery, transitions and implementation
6. Business change, process improvement and digital
7. Scheme finance and treasury management
8. Technology and systems enablement
9. People leadership and operational management

Most roles will have one principal job family, although some will draw significantly on a second. Identify the family which best reflects the main purpose of the role and record a secondary family where this helps describe the work accurately.



Each Job Family Pathway contains four capability levels, with names and descriptions suited to the family. The relevant pathway explains the responsibilities, skills and evidence associated with each level.

Capability should be assessed from the individual's current work and evidence, not inferred from their job title, time served or years of experience. Two people with the same job title may demonstrate different levels of capability.

3 The three skill domains

Each Job Family Pathway describes capability across three skill domains. Development and capability discussions should consider evidence across all three rather than focusing mainly on technical knowledge.

Domain	What it covers
Technical pensions capability	Scheme knowledge, calculations, systems use, data quality, controls and audit trail discipline
Personal effectiveness	Accuracy, workload management, judgement, risk awareness, planning and prioritisation
Behavioural and interpersonal skills	Communication (written and verbal), empathy, member support, coaching others, handling challenge

And the five behavioural stages?

The Professionalism and Behaviours Framework describes the behavioural standards expected across five progressive stages. Use it alongside the relevant Job Family Pathway when discussing behaviours or explaining what development may look like at the next stage.

2. Your role as a manager

The framework supports your existing processes, it doesn't replace them

The framework provides a common structure for development conversations and capability discussions. It doesn't replace your organisation's management, performance or progression processes.

What you're responsible for:

- Having regular, structured development conversations in lie with your organisation's usual arrangements
- Helping individuals identify the job family which best reflects their work
- Using the relevant Job Family Pathway to discuss current capability, evidence and development priorities
- Considering evidence across all three skill domains
- Supporting individuals who choose to use the Personal Development Record
- Applying agreed evidence standards consistently when contributing to progression decisions
- Supporting individuals who want to explore another job family

What you're not responsible for:

- Knowing every detail of every job family – use the relevant Job Family Pathway as your reference point
- Completing or maintaining an individual's Personal Development Record
- Addressing every development need in a single conversation
- Changing formal assessment, performance or progression processes independently of your organisation's agreed approach

Start here

A useful first step is to read the Job Family Pathways relevant to your team and use them to prepare for your next development conversations.

3. Running development conversations

How often and what format

Build development into your organisation's existing one-to-ones and review arrangements. Regular, focused conversations are generally more useful than relying on a single annual discussion.

When workloads are under pressure, it may be better to hold a shorter conversation than repeatedly postpone it. Agree a frequency which reflects the individual's needs and your organisation's processes.

What to cover

Current position	What's the individual doing confidently and where do they need more experience or support?
Evidence	What examples demonstrate their current capability?
Priorities	Which areas of development would make the greatest difference?
Support	What do they need from you, the wider team or available learning?
Direction	What are their longer-term interests, including possible moves between job families?

Questions that work

Question to ask	Why it helps
What are you finding most satisfying in your current role right now?	Opens positively. Surfaces what motivates them – useful for development planning
What types of work feel most uncertain or difficult now?	Identifies genuine gaps without making it feel like a criticism
Which of the three skill domains – technical, personal effectiveness or behavioural – do you want to focus on most in the next few months?	Helps prevent conversations from covering only technical skills
What recent examples best demonstrate your development or capability?	Encourages the individual to identify evidence, whether it's recorded in the PDR or elsewhere
What would you like to be handling more independently in the next six months?	Creates a direction. Anchors the development goal
Are there other types of work or job families you'd like to explore?	Opens the door to mobility conversations early rather than after the fact
What support do you need from me that you're not currently getting?	Surfaces blockers. Shows development is a shared responsibility



After the conversation

- Record the principal actions, responsibilities and review points
- Begin the next conversation by reviewing progress against those actions
- If the individual uses the PDR, encourage them to record any goals or evidence they consider useful
- Follow up promptly on any action you've agreed to take

4. Assessing capability

A shared judgement, not a manager's judgement

Capability assessment should be a transparent discussion, not an unexplained judgement made by the manager.

The Job Family Pathways describe what capability looks like at each level. Use the relevant descriptions as a shared reference point for discussing the individual's work and evidence

4.1. A practical assessment approach

Identify
The Job Family Pathway which best reflects the individual's work

Review
Their current and possible next capability levels

Consider
Evidence across all three skill domains

Look
For consistent evidence over time rather than one example

Discuss
Where evidence aligns and where it's still developing

Record
Agreed developme nt priorities and review timing

Role level, isn't capability level

The level expected of a role and the capability currently demonstrated by the individual are related, but they aren't necessarily the same. Don't assign a level solely because it appears in a role profile or job title.

4.2. Common assessment pitfalls

Relying on time served	Length of service can provide opportunities to build capability, but it isn't evidence of capability in itself
Relying on general impression	Identify the work and evidence supporting the assessment
Focusing only on technical knowledge	Consider personal effectiveness and behavioural and interpersonal skills as well
Waiting for a promotion discussion	Review capability and development throughout the year
Applying different standards	Use the same evidence principles consistently across comparable assessments

4.3. When someone is between levels

It's normal for an individual's evidence to align with different levels across different areas.

Where this happens:



Look at the overall evidence

Use the level which best reflects the overall evidence, while recording areas of strength and development rather than forcing every aspect into a single description.

5. Making progression decisions

Progression should be evidence-led

Progression decisions should be fair, transparent and based on relevant evidence. Where someone isn't yet ready to progress, they should understand what further capability or evidence is needed and when this will be reviewed.

5.1. Progression readiness checklist

Readiness indicator	Yes / Partial / No	Notes
The individual demonstrates the target level consistently, rather than only in isolated examples		
Evidence covers all three skill domains		
Relevant quality, performance or service evidence supports the assessment		
The individual demonstrates the judgement, independence and breadth expected at the target level		
Development and career intentions have been discussed with the individual		
The same evidence standards have been applied as in comparable progression decisions		
The organisation's usual governance and approval process has been followed		

5.2. When someone isn't yet ready

Be clear and constructive about the decision. Explain:

Expectations
Which expectations or evidence aren't yet demonstrated consistently

Opportunities
What opportunities will be available to address the gaps

Actions
Two or three specific actions for the individual and manager

Review
When progress will be reviewed

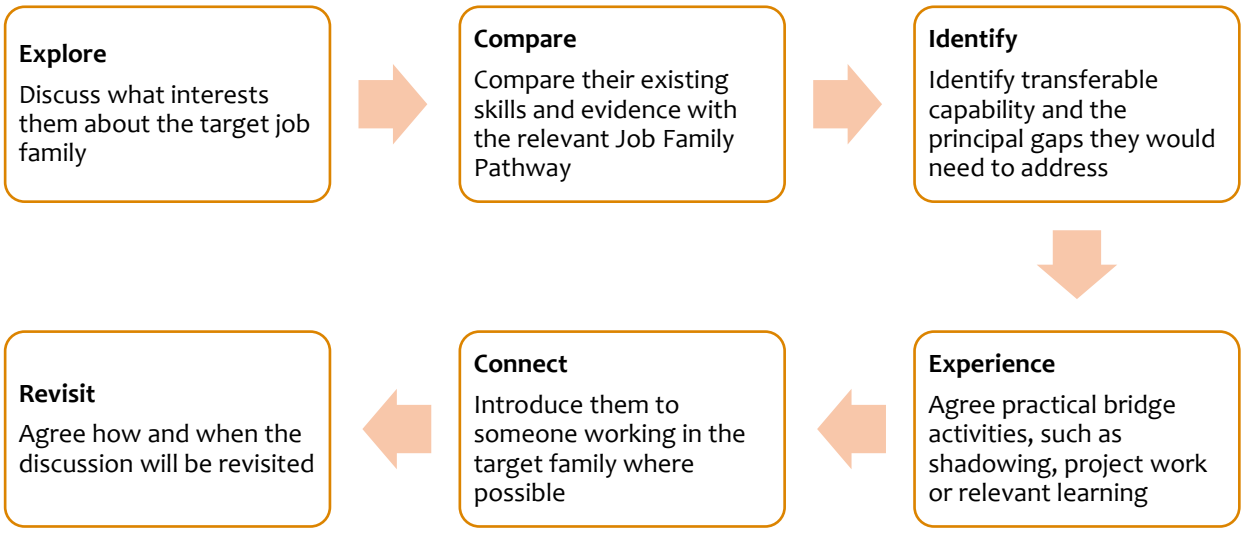
Record the discussion and follow through on the agreed support and review arrangements.

6. Supporting mobility

Mobility starts with an open conversation

The framework can help individuals explore moves between job families by making related skills and development needs more visible. A manager's role is to support an open discussion while being realistic about available opportunities.

6.1. What to do when someone raises a move:



The PDR can help, but it's optional

If the individual uses the PDR, Section G can help them record this, but it shouldn't be presented as compulsory.

7. Common situations

Someone new to the role

What to do

Identify the job family which best reflects the role and use the relevant Job Family Pathway to explain its expectations. Don't assume someone is at L1 simply because they're new to the role, consider their existing capability and evidence. Introduce the PDR as an optional development resource once they understand the framework.



Watch point

Agree an early development conversation rather than waiting until the formal probation review.

Someone ready for the next level

What to do

Review evidence against the target level across all three skill domains. Record the basis for the assessment and follow the organisation's normal progression process.



Watch point

Distinguish demonstrated capability from the availability of a promoted role. Be clear where someone meets the capability expectations, but an immediate progression opportunity isn't available.

Someone who feels stuck

What to do

Explore whether the issue relates to a particular capability area, access to suitable experience, confidence, career direction or the opportunities available. Agree two or three specific development actions.



Watch point

The next step may involve deepening capability in the current family or exploring a different one. Don't assume upward progression is the only answer.

A long-serving experienced practitioner

What to do

Not everyone wants or needs to move to a higher capability level. Discuss what continuing development means to the individual, which may include deepening expertise, mentoring others, undertaking different work or contributing to service improvement.



Watch point

Recognise continuing expertise and contribution. Upward progression isn't the only form of career development.

8. The Personal Development Record

The PDR belongs to the individual

The Personal Development Record (PDR) is an optional document owned and maintained by the individual. It is their decision whether they use it and also what to share with their manager or employer. It can support development conversations and provide a portable record of goals, learning and evidence, but completing it shouldn't be a condition of progression.

How to use it in practice

Invite
Where an individual chooses to use and share their PDR, invite them to bring it to development conversations

Discuss
Use the self-assessment as a starting point and discuss any differences in interpretation

Agree
Use Section C to agree specific development goals

Refer
Refer to relevant evidence in Section D when discussing capability or progression

Update
Encourage the individual to update Section F after a review if they find this useful

It's optional, keep the conversation going

If an individual chooses not to use it, continue the development conversation and record agreed actions through your organisation's usual process. If they're interested but unsure where to start, explain how it may help and suggest beginning with one goal or one item of evidence. Don't complete it for them or make its use a test of their commitment to development.

Use the Manager's Guide alongside the Job Family Pathways relevant to your team. Follow your organisation's existing processes for formal performance, assessment and progression decisions. The latest PASA Career Pathways documents are available on the PASA website.

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).

Meet the Working Group

Dan Taylor
Board Sponsor
PASA

Working Group Members

Clare Green
WTW
Fay Knight
Brightwell
Jason Mathew
LCP
Martin Wigfield
Zatori
Michelle Darby
People's Partnership
Nick Walker
Howden
Paula Godden
Aptia
Tracey Valentine
NHS
Vanessa Jackson
PMI



PASA



Get in touch:

info@pasa-uk.com

www.pasa-uk.com

PASA is a Community Interest Company. Full name: Pensions Administration Standards Association CIC.
Company number: 6597097.