Administration Careers & Development Working Group

Career Development Toolkit

Personal Development Record



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PASA

Career Development Toolkit: Personal Development Record

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Personal Development Record

Your personal development record

A flexible way to plan your development, reflect on your progress and record evidence.

Your record, your pace

Use the sections which are relevant to you, update them when useful and decide what you want to share.

Planning your development and recording your evidence

For use across all nine PASA job families

Record holder:	
Name	
Job family	
Started	

This is your personal development record. You can use it across all nine job families and at any capability level. Complete it at your own pace and return to the sections which are useful to you. You decide whether to share it, including in development conversations with your manager.

Don't include personal member data, confidential scheme information or employer material you aren't authorised to retain or share. Summarise the evidence and record where it's held securely instead.

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 Personal Development Record is one of the Shared Career Pathways Resources. It's an optional personal record of your development goals, learning, evidence and career direction. Use it alongside the Job Family Pathway relevant to your role and the Professionalism and Behaviours Framework.



How to use this document

You don't need to complete every section or work through the document in order. Start with the sections most relevant to you and add to them over time. You may find it helpful to use the record when preparing for a development conversation, but you decide what to share.

The seven sections:

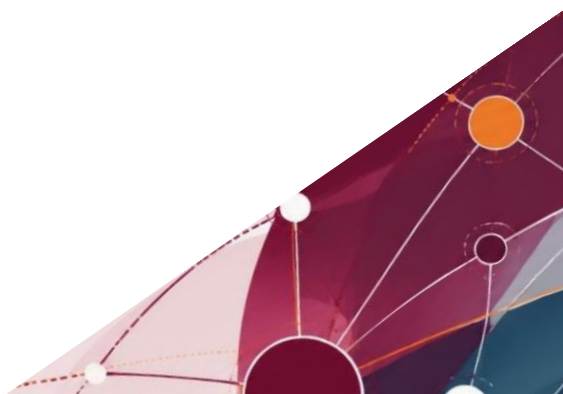
	Section	What it's for
A	**My profile**	Your current role, job family, career interests and development direction
B	**Self-assessment**	A structured review of your capability and evidence across the three skill domains
C	**My development goals**	The development priorities you want to focus on and the actions you'll take
D	**Evidence log**	A record of relevant evidence, feedback, achievements and learning
E	**Learning and study plan**	The formal and informal learning you're undertaking or considering
F	**Review log**	Brief notes from development conversations or your own reviews
G	**Mobility planning**	An optional section for exploring a move to another job family

Your first steps

1. **Complete Section A**
   To record your current role and development direction
2. **Use Section B**
   Alongside your Job Family Pathway and the Professionalism and Behaviours Framework
3. **Record in Section C**
   Up to three current development goals
4. **Add to Sections D and E**
   Relevant evidence and learning over time
5. **Use Section F**
   When you want to record the outcome of a development conversation or personal review
6. **Complete Section G**
   Only if you're exploring a different job family

There's no set timetable

There's no required timetable for updating the record. Review it when your role, development priorities or career direction changes, or when you're preparing for a development conversation.



A. My Profile

Complete the fields which are useful to you. Return to this section when your role, development priorities or career direction changes.

A1. About me

My name	
My employer / organisation	
My current job title	
My principal job family	
My secondary job family, if relevant	
The capability level which currently best reflects my work and evidence	
The capability level or career direction I want to explore	
My career direction	
My line manager / main point of support	
Date I started using this document	

A2. My career direction

Use these questions to consider what matters to you and how you might want your career to develop. You don't need to answer every question or have a fixed long-term plan.

Question	Your notes
What do I enjoy most about my current role?	
What kind of work would I like to be doing in 2–3 years?	
Am I looking to progress within my current job family, or move into a different one?	
What capability, experience or support would help me move in this direction?	

B. Self-Assessment

Use your Job Family Pathway to identify the capability descriptions relevant to your role and the level you're considering. Record the evidence you already have and the areas you want to develop. This is a personal reflection and a starting point for discussion. It isn't a performance rating or a formal capability decision.

Rating key:

Not yet evidenced	Some evidence	Consistent evidence	Extending evidence
I haven't yet had the opportunity to demonstrate this	I've demonstrated this in some situations but need further experience or consistency	I can demonstrate this reliably in my current work	I can demonstrate this in broader or more complex situations, or help others develop it

Assess the evidence against the expectations in your Job Family Pathway. The ratings don't correspond directly to L1–L4.

B1. Technical pensions capability

Capability or expectation from my Job Family Pathway	Evidence status	Evidence or examples	Development priority	What I'll do next

B2. Personal effectiveness

Capability or expectation from my Job Family Pathway	Evidence status	Evidence or examples	Development priority	What I'll do next

B3. Behavioural and interpersonal skills

Use the Professionalism and Behaviours Framework to select the behaviours most relevant to your role, current behavioural stage and development priorities.

Capability or expectation from my Job Family Pathway	Evidence status	Evidence or examples	Development priority	What I'll do next



Understanding the five behavioural stages

The Professionalism and Behaviours Framework describes professional conduct across five behavioural stages. Use the relevant stage as a guide, recognising that your evidence may align with different stages in different areas.



Another perspective can help

If you choose to discuss your assessment, a manager, mentor or trusted colleague may be able to offer another perspective on your strengths and development priorities.

C. My development goals

Record up to three development goals for your next review period. Make each goal specific enough for you to recognise what progress will look like.



Planning your development

The 70/20/10 principle can be used as a planning prompt: development may come from practical experience, learning from other people and formal learning. The proportions aren't fixed, and not every goal needs to include all three.

My goal (be specific)	Why it matters	Experience, support or learning	What progress will look like	Review date



Review your goals

Review your goals at an appropriate point. Close those you've achieved, revise those which have changed and add new priorities where needed.

D. Evidence Log

Add evidence when you've something relevant to record, such as work you've completed, feedback, a learning reflection, an improvement you've contributed to or an example of supporting others.

Keep your evidence secure

Don't include personal member data, confidential scheme information or employer material you aren't authorised to retain or share. Summarise the evidence and record where it's held securely instead.

Evidence might include:

- Examples of work or outcomes
- Quality or performance information
- Feedback from managers, colleagues, clients or other stakeholders
- Learning or qualification records
- Reflective notes
- Examples of coaching, collaboration or leadership
- Contributions to projects, improvements or problem-solving

My evidence log

Add rows or duplicate the table as needed. In the 'Skill domain' column, record one or more of the following: Technical pensions capability; Personal effectiveness; Behavioural and interpersonal skills.

Date	Evidence or example	What it demonstrates	Skill domain	Relevant capability, behaviour or goal	Where the supporting material is held

The evidence log may be useful when preparing for a development or capability discussion, applying for a role or completing an evidence-based qualification. Check the relevant requirements before using it for a formal application or assessment.

E. Learning and Study Plan

Record the formal and informal learning which supports your goals. This might include practical experience, coaching, shadowing, reading, internal training, courses or qualifications.



Qualifications aren't compulsory

A formal qualification isn't required for progression within PASA Career Pathways. Choose learning which is relevant to your role, development priorities and preferred way of learning.

Development can include:

- **Practical experience** – applying or extending skills through your work
- **Learning from others** – coaching, mentoring, feedback, observation or collaboration
- **Self-directed learning** – reading, research, webinars or professional events
- **Structured learning** – internal training, courses, apprenticeships or qualifications

Your Job Family Pathway identifies learning and qualifications which may be relevant to your role.

My learning plan

Learning or development activity	How it supports my goal	Provider, source or support needed	Timing	Intended outcome or evidence

F. Review Log

Use this section when you want to record a development conversation or reflect on your own progress. Keep the entry brief and focus on what you've learned, what has changed and what you'll do next.



Review when it works for you

There's no required review frequency. Use the record in a way which supports your development and fits with your organisation's usual arrangements.

Date	What went well	What was harder than expected	Feedback I received	My agreed priorities and next steps

G. Mobility Planning

Use this optional section if you're exploring a move to another job family.



Your existing skills can travel with you

You won't necessarily be starting from the beginning. Some of your existing capability and evidence may be transferable, while other areas may need further experience or development. Use the target Job Family Pathway to compare the requirements with your current evidence.

G1. Comparing my current and target job families

Read the Job Family Pathway for the family you're considering. Identify:

- Capability and evidence you can transfer
- Expectations which are new or different
- Relevant learning or qualifications
- Practical experience which could help bridge the gap
- People who can help you understand the work

G2. My mobility plan

Complete this section when you have a specific job family in mind. If you are exploring options, use Section A2 first to clarify your direction.

My current principal job family	
The job family I'm considering	
Why this direction interests me	
Capability and evidence from my current role which may be transferable	
Capability or evidence I may need to develop	
Bridge activities I am doing or planning	
People or resources who can support this move	
My next step and review date	

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).

Speaking to people who already work in the job family can provide useful practical context. Your manager, mentor or professional network may be able to help you make appropriate connections.

Meet the Working Group

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