

## QPA work based units – making the case

### Executive summary

A wide-ranging problem is that many Qualification in Pension Administration (QPA) candidates seem to race through the exam-based units and then either fail to complete the work-based units, or take years to do so. This is despite some companies offering candidates financial incentives to complete the qualification.

In this article **Guy Dove**, who himself took four years to complete the qualification, looks at the reasons for this trend. He suggests how to overcome these factors and makes the case for QPA students to persevere with the work-based units.



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### Setting the scene

Wherever I have worked, it has been the same old story - QPA candidates take a lot longer to complete the work-based units than the exam-based units, if indeed they finish them at all. The same thing applies, I understand, in many other pensions firms. What are the reasons for this, and what can we do about it?

### Pressure of work

QPA candidates may not feel they have enough time to commit to collecting evidence, particularly if they are under pressure to meet deadlines for clients or members. They could even feel like they are letting the team down if they take time out to work on their QPA at busy times.

The work-based units are hard work and often other tasks can get in the way. I found it helped to make a mental note of what examples were needed for the earlier units, have all the necessary forms in an accessible place and, when a case came along, to document the evidence alongside doing the actual work. This was much better than trying to remember examples of work, weeks afterwards.

Work colleagues should have an understanding of what QPA candidates need to be doing and that it will sometimes have an impact on their day-to-day role.

### Lack of study support

Unfortunately, there is a trend for some employers to withdraw study leave and financial incentives for pensions administration qualifications. This may understandably cause employees to not complete the full QPA qualification if they do not think their employer values it.

I would suggest asking potential QPA candidates to think of their wider career aspirations. In my role I see lots of CVs. If someone has shown the industry and diligence to make progress on the QPA work-based units, then this counts as a big plus. If they have achieved this without financial incentives from their employer, then this really makes them stand out.

### QPA assessors

I would encourage QPA assessors to work actively with and continuously encourage their candidates as they are extremely important in getting them through the qualification. Assessors are busy people but it helps candidates if their portfolios are assessed as quickly as possible. The more assessors try to make time for their role and to act as a mentor the better the grounding in all aspects of administration the team members will have.

The assessor/mentor should help the candidate to produce a good action plan before making a start and have regular update meetings with the candidates to make sure they stick to it. They should also promote work-based units as much as possible. An enthusiastic mentor will transmit this enthusiasm to the candidates.

### **External verifiers**

It is important to have the same external verifier throughout the period of learning and I would encourage suitable people to volunteer. External verifiers have an important role, not just acting as a support and guide but also reporting back to the PMI on how the qualification is run in each centre.

### **The later units**

Unlike the earlier units, where the requirements tend to be those of candidates' day-to-day work (e.g. retirements, deaths, early leavers), students may consider the later units are not as relevant to their current jobs. Indeed it is common for people to do Units 1 and 2 then fail to complete the others.

I would again suggest that candidates consider their wider career aspirations. Some of the items in the later units are a part of team leader and management roles and this is why they are included in the syllabus.

### **How to approach the work-based units**

Co-operation with colleagues is the key. If a new candidate needs an example of, say, a death case or a renewal, and one comes along which someone else in the office would normally do, then I would recommend a system where they pass across that work to the new candidate.

Although some cases e.g. trustees exercising discretion may be rare, do remember that candidates can go back two years to find examples. They can also use simulation if a real case does not arise, provided their external verifier or the Pensions Management Institute (PMI) knows about it. In addition, not all evidence has to be in the form of case studies. Personal statements are an alternative.

### **Conclusion**

Certainly, achieving QPA takes a lot of hard work and sacrifices but in getting this qualification, candidates will learn valuable skills for the future and help their career prospects. They can then look back with a fully deserved sense of achievement.

For employers, having qualified staff with professional qualifications will attract new business.

### **Key messages for candidates**

- Make an action plan before you start and stick to it
- Work with your assessor
- Collect examples while doing your normal role
- Let colleagues know what examples you need
- Consider your wider career aspirations if things get tough
- Work hard then celebrate later!

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