

Application for Registration as an Actuarial Training Office (ATO)

A. Organisation Details

Name of Organisation:			
Registered Postal Address:			
Full Name of ATO Representative			
ASSA Member number			
Membership Type (Please Tick) NB: the ASSA Official ATO representative cannot be a student member	FELLOW MEMBER	ASSOCIATE MEMBER	LIBRARY MEMBER
Do you have adequate supervision for students to complete their Work Based Learning Requirements i.e. a Fellow with ASSA or with a Mutually Recognised Agreed actuarial Organisation e.g. UK IFoA	YES	NO	

B. Expectations from ASSA:

ATO - Organisation

For the purposes of WBL, ATO's will play a key role in facilitating the training, development, and supervision of actuarial students. The ATO will also be an important means for communicating WBL related information to actuarial students and supervisors.

Undertakings:

- To provide students with appropriate support, including study leave, as per the organisation's policy in this regard, for their studies.
- That it will actively provide students with opportunities to gather the necessary exposure to the learning objectives of the WBL program.
- That it will provide students with appropriate supervision and mentorship, the latter with a Fellow of the Actuarial Society (who need not necessarily be an employee of the organisation)
- Should the ATO have difficulty in sourcing professional supervisors for their students, the Society will endeavour to assist in locating Fellow members of the Society who have volunteered for this role. Please contact the ASSA office should you require assistance in the regard: memberservices@actuarialsociety.org.za

Please refer to Annexure A for further information pertaining to the responsibilities for each of the role-players within the WBL programme.

C. Undertaking and sign off by the appointed ATO Representative:

- I will notify ASSA with regards to any changes to the details of the appointed ATO Representative
- I will complete the annual declaration confirming compliance of responsibilities as set out in this document (refer to Annexure A)
- I will be the key contact between ASSA and the ATO Organisation

Title: _____

Full name: _____

Signature: _____

Date: _____

Once this application is approved, an "ATO reference number" will be issued by the Actuarial Society; this number should be quoted on all student applications for registration on the WBL program.

An annual declaration is required to be submitted by the ATO Representative each year and in considering the renewal application, the Actuarial Society will consider the experience over the period.

Employers are encouraged to engage with the Actuarial Society should they experience any difficulty with the implementation of the WBL program. The Actuarial Society will endeavour to arrange regular information sharing initiatives to provide an opportunity to share experiences, as this is a program that should be for the benefit of both the student and the employer.

Please submit this application, along with any further queries or enquiries to the ASSA Office:

Email: memberservices@actuarialsociety.org.za

Tel: 021 5098210

ANNEXURE A

Compliance and responsibilities of Key Role-players in the WBL programme

Roles	ATO Representatives	Supervisor	Student
Membership	Fellow or Associate of ASSA or another mutually recognised actuarial association OR Library member BUT may not be a Student Member	Fellow of ASSA or another mutually recognised actuarial association	Student member of ASSA
Responsibilities	<ul style="list-style-type: none"> • Conducive environment for students who are studying actuarial science with appropriate policies where relevant also ensuring that the students have access to environments to gain experience across all key dimensions of the WBL programme • Ensure that students have been assigned a Supervisor and that the supervision is adequate and effective • Key liaison function between ASSA and role players ensuring that opportunities and challenges are addressed timeously 	<ul style="list-style-type: none"> • Gate-keeper to self-regulation of the profession ensuring that students gain adequate WBL experience before qualifying as actuaries • In-depth understanding of the WBL programme and the experience required across key dimensions • Mentor and monitor student progress across key dimensions of the WBL programme and ensure that Supervision can be evidenced 	<ul style="list-style-type: none"> • Overall accountability for meeting WBL outcomes across key dimensions • Register and evidence work based learning progress that can be independently assessed • Raise concerns and / or challenges through internal processes engaging with the ATO representative
Compliance	<ul style="list-style-type: none"> • Final sign-off that the Supervisor and Student have followed the necessary processes to submit final WBL assessments to ASSA. • Declaration confirming compliance of responsibilities noted above 	<ul style="list-style-type: none"> • Interim sign-off that the Student is making progress on the WBL programme. • Final sign-off that students has the necessary WBL experience to qualify as an actuary subject to all other academic and normative • Declaration confirming compliance of responsibilities noted above requirements being met. 	<ul style="list-style-type: none"> • Interim and final preparation and submission of the portfolio of evidence in support of the WBL programme. • Declaration confirming compliance of responsibilities noted above