



## Quality Assurance Scheme for Organisations

### Pilot Participation Agreement with [XYZ]

#### 1. Background

- 1.1. The Institute and Faculty of Actuaries (the “IFoA”) will operate a pilot of its Quality Assurance Scheme for Organisations from 9 June 2014 to 30 November 2014 (the “Pilot”).
- 1.2. [XYZ] has agreed to participate in the Pilot.

#### 2. The IFoA’s commitments

- 2.1. The IFoA undertakes to:
  - 2.1.1. Support [XYZ] in the Pilot process, as described in the Guidance for Pilotees;
  - 2.1.2. Have regard to the outcomes of the Pilot when assessing any subsequent application by [XYZ] for Quality Assurance Scheme accreditation, provided:
    - 2.1.2.1. [XYZ] agrees to this; and
    - 2.1.2.2. [XYZ] applies for such accreditation within the first advertised window for such applications
  - 2.1.3. Maintain as confidential and not to make any unauthorised use of any of [XYZ’s] private or confidential information gathered in the course of the Pilot; and
  - 2.1.4. Share the final report prepared by the Assessment Team (the “Assessment Report”) with [XYZ].

#### 3. [XYZ]’s obligations

- 3.1. [XYZ] undertakes to:
  - 3.1.1. Use their best endeavours to adhere to the Pilot timelines, as confirmed in the Guidance for Pilotees;
  - 3.1.2. Engage fully with the Pilot process, as described in the Guidance for Pilotees;
  - 3.1.3. Make the appropriate personnel and documentation available to the Assessment Team; and
  - 3.1.4. Provide feedback to the IFoA on the Pilot

#### 4. Data Protection

- 4.1. The IFoA and [XYZ] each warrant that it shall comply with all relevant data protection and privacy laws which apply to the transfer and/or processing of personal data in connection with this agreement.

**5. Withdrawal**

5.1. Either the IFoA or [XYZ] may withdraw from this Agreement, upon the provision of reasonable notice in writing (including email) to the other.

Signed on behalf of [XYZ] .....

Name.....

Date .....

Signed on behalf of the Institute and Faculty of Actuaries .....

Name.....

Date .....