



Institute
and Faculty
of Actuaries

Continuing Professional Development Requirements

Information for Appropriate Persons

August 2021



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Purpose of the Reflective Practice Discussion (RPD)

The purpose of the RPD is to provide members with the opportunity to reflect upon their CPD activities, the learning outcomes of those activities and how they have applied what was learnt. The discussion should also allow the member to consider how they intend to approach future development and learning, including anticipated new work and roles.

By focusing on the learning outcomes of CPD activities, members will be able to better assess the quality of their learning and the relevance of their activities to both maintaining their competence and developing for the future.

Role of the Appropriate Person

The Scheme defines an Appropriate Person as “An individual identified by the Member, who understands the nature of the Member’s Actuarial Work, their development and their Learning Outcomes. Such an individual could be a peer, a colleague, a line manager or a volunteer of the IFoA, amongst others.”

The Appropriate person need not be a member of the IFoA nor an actuary. The key is that they understand the work a member does, where their development might take them, and what the learning outcomes of the CPD activities might be. There needs to be trust between the two parties, a willingness to be open and a genuine interest in embracing the discussion.

The Appropriate Person will assist and encourage the member to reflect on their learning and development. They will ask questions to support the member in assessing themselves, and their CPD activities with a view to determining the value of their activities and whether those activities addressed their needs.

The discussion is not an interview and is a two way exchange between the member and the Appropriate Person. It is important that it is an open and wide ranging conversation. With the help of the Appropriate Person, the member should explore other ideas, get a fresh perspective and consider the possibility of the provision of support from peers or others.

Before the discussion

The discussion can take place any time after a member has completed their CPD activities for the year. This will allow them to reflect on all of their activities and whether they met their learning objectives for the year.

A date, time and method of communication should be confirmed with the member well in advance, as well as an estimation of the time to spend on the discussion. Discussions can be held over the phone, video conferencing or in person.

To assist the discussion, the Appropriate Person should request details of the member’s current role, workload and future aspirations. They should also find out whether the member has faced any challenges with CPD over the year. It may also be helpful for the Appropriate Person to see a copy of the member’s CPD activities and any other relevant documents to assist the discussion, for example, personal development plan or objective setting.

The IFoA would suggest that only the member and Appropriate Person be present during the discussion, to ensure it is as open and candid as possible.

The Appropriate Person does not require any training to fulfill this role, but would be advised to read this note, the [RPD help sheet](#) and the [CPD Scheme](#).

During the discussion

During the course of the RPD, the Appropriate Person should expect the member to:

- explain their current role and about their career development plans;
- explain how they planned their activities and why they chose them;
- reflect on the knowledge and skills gained, and the outcomes of their activities;
- explain how this helped them in their role (or whether it did not);
- explain their next steps;
- identify any areas for development; and
- flag any areas where they have identified a need for additional support in improving their development/learning and explain the sort of support they would like.

The Appropriate Person will have to:

- discuss with the member their learning and how the activities have helped them to develop;
- be able to identify gaps in the member's learning;
- be able to suggest further learning topics;
- be able to suggest different methods of achieving learning and development needs; and
- be able to suggest how the member might be able to get additional support in meeting their learning and development needs.

To assist the discussion, a list of possible questions and challenges is provided at **Appendix A**.

The Appropriate Person can offer suggestions in the course of the discussion on other methods by which objectives can be met and can challenge the conclusions that have been drawn, but the purpose of the challenge is to prompt further consideration and not to present criticism.

It may be useful to keep a record of the discussion to follow up on any action points, however this is not mandatory.

After the discussion

Members can expect to leave the discussion with a more in depth understanding of the outcomes of their CPD activities and some action points on how they can do more meaningful learning.

The Appropriate Person can offer support, follow up on any suggestions made and pass on any relevant information discussed. Where appropriate, there may also be some follow up discussions about particular areas of development or to understand whether particular steps have been taken. However, it is up to the Appropriate Person and the member to determine whether to stay in touch or not.

If an Appropriate Person encounters any issues during the process, they should get in touch with the IFoA in the first instance and our team will be happy to offer help and support to remedy the problem.

Contact Details

If you have any further queries please contact us at: cpd_feedback@actuaries.org.uk

Appendix A

Suggested Questions for Reflective Practice Discussions

What is your current role?

What kind of work do you carry out?

Where would you like your career to go?

What is your area of practice?

Is there a different area that you would like to move into?

Are you considering another role, or would you like a promotion?

What could you do to prepare yourself for such a change?

What do you consider to be your strength and weaknesses? Do these relate to your technical knowledge or soft skills?

What has been going well at work?

How are you performing?

What were your main objectives for the year?

What areas did you want to learn about?

Which skills did you want to develop?

Who has assisted you in identifying your needs?

Who did you talk to about your performance, needs and objectives?

Have you received any constructive feedback from colleagues or users/ clients of your work on your delivery of the work?

Did you find out if the work was as a user expected?

How did you plan to get to where you need to be?

What do you do to ensure your knowledge is relevant and up to date?

How do you maintain your competence?

What kind of activities do you favour?

What have you learned from your experiences?

Why did you select this activity?

What did you hope to learn from this activity?

What did you think of the activity?

What did you learn from the activity?

Could the activity have been improved or bettered?

Did this activity address the need/ objective you hoped it would?

If not, what action will you take to address the need/ objective?

How will you follow this up?

What are you taking away from this discussion?

What other areas could you look into?