



## Continuing Professional Development Requirements

### Reflective Practice Discussions with the IFoA

#### Introducing Reflection

The concept of reflection requires us to question our beliefs, the knowledge we have acquired and the conclusions that we have drawn. In order to reflect we are asked to maintain an element of uncertainty and be open to investigating the foundations of those beliefs.

In the professional setting, reflection means assessing the values and theories that inform our actions at work. In assessing those values and theories, and questioning our experiences, we are able to identify why we act in such a way and how we deliver our work. This understanding can in turn help us shape our learning and future development, by allowing us to make better informed decisions.

#### Reflective Practice Discussions with the IFoA

The CPD Scheme requires members to take part in a reflective practice discussion every year with someone appropriate and also, if selected, participate in a reflective practice discussion with the IFoA.

This document explains more about the reflective practice discussions with the IFoA. For information on the concept of reflection in general and the annual reflective practice discussions with an 'appropriate person', please see this separate [information sheet](#).

Every year some members will be selected for a discussion with the IFoA's specialist team. Not all members will be asked to have this discussion and those asked will not have to do it every year.

The aim of the discussions will be to reflect upon the member's learning: what they have done over the last year and how they are applying that in practice as well as areas for focus for learning over the next year (and beyond). But it will also be an opportunity for the member to obtain support, advice and suggestions from the IFoA on how they achieve their learning goals.

#### Before the discussion

The IFoA's team will contact members in order to arrange a date and time for the discussion. The discussions will usually be held over video conference or by telephone.

Part of the discussion will be around the previous year's learning, so members will be expected to come along prepared to talk about what they have been doing, including the outcomes achieved. This means that the activities discussed might cover two CPD years.

Members are required to keep a record of their activities to assist with the reflective practice discussions and members will be asked to share this with the IFoA before the discussion. This is simply to allow the team to prepare for the discussion in advance and to ensure they are prepared to support each individual. Evidence of attendance will not be requested and records will not be checked or audited.

Members are responsible for identifying their learning and development goals and objectives for the CPD year ahead and to come to the discussion ready to talk about that. Which areas of their work do they need to develop their knowledge of; are there new developments in a particular field that they need to catch up on; where is their career likely to take them this year? It might be worthwhile capturing this beforehand, perhaps in a journal or on another version of the record, to help facilitate the discussion.

Notes from member's annual reflective practice discussions with their appropriate person are also likely to be useful, though are not necessary.

## **The IFoA Team**

The IFoA have set up a specially trained team to conduct these discussions. Their main objective is to create value for IFoA members and ensure they are receiving support to carry out meaningful learning.

In order to get the most out of a discussion there needs to be a willingness to be open and a genuine interest in embracing the discussion. The IFoA team is responsible for assisting and encouraging 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. It is important that it is an open and wide ranging discourse. The team may challenge a member on the conclusions they have drawn, but the purpose of the challenge is to prompt further consideration and not to present criticism.

The IFoA team is not responsible for 'monitoring' or 'auditing' the CPD done by the member, but if they have concerns as to the integrity of the IFoA member there will be a due process to follow, which may lead to a referral under the Disciplinary and Capacity for Membership Scheme which is further explained below.

## **During the discussion**

In order to ensure the discussion is as open and candid as possible only the member and one representative from the IFoA will be present. The discussions will be confidential and no information will be shared on the content of the discussion with the member's employer.

At the discussion the member will be asked to confirm their details, their record of CPD and their current employment. The IFoA team will select a number of activities to cover and agree this with the member.

Following a trial of these discussions conducted by the IFoA, it was found that a flexible, free flowing approach suited most members and created the best outputs. Each member is an individual, with their own career path, development goals and expectations. It follows that each discussion will therefore be unique and appropriate for the individual.

A reflective cycle does however serve as a good foundation and reminder of what these discussions are supposed to cover. The discussion is therefore likely to follow a number of stages (as set out in 'Gibb's Reflective Cycle'):

1. Description of the experience
2. Feelings and thoughts about the experience
3. Evaluation of the experience, both good and bad
4. Analysis to make sense of the situation
5. Conclusion about what was learned and what could have been done differently
6. Agreeing an action plan for how the member would deal with similar situations in the future, or general changes they might find appropriate.

During the course of the reflective practice discussion, the member might therefore typically:

- 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 IFoA team will:

- discuss with the member their learning and how the activities have helped them to develop;
- assist the member to identify gaps in their learning;
- assist the member to identify 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.

## **After the discussion**

Members can expect to leave the discussion with a better understanding of what the outcomes of their CPD activities were and an action plan for their forthcoming CPD year. This might include other topics to learn about, events to attend, work to discuss with their employer or educational courses to consider.

The IFoA can support members in fulfilling their action plans, if required. The team might stay in touch to check in on how matters are progressing, and whether the member has faced any obstacles in following their plan.

Where problems are identified in the reflective practice discussion, support to remedy the problem will also be offered. This could include further discussions with the member where the team explore the problem, why it has arisen and what the member needs to address it.

The IFoA will look at CPD activities with the member to determine whether the problems can be addressed through further learning and development. A plan and objectives will be agreed with the member, with a timescale and regular check-ins. In the event that the plan is followed and is considered to be effective, the matter will be closed.

In the event that the plan is not followed, or the team consider there to be further grounds for concern, another reflective practice discussion will be scheduled for the next CPD year or further follow up actions will be agreed.

Where communication is not forthcoming, or the member refuses to address the problems identified, the team will consider whether the behavior amounts to misconduct and whether an executive referral is necessary under the Disciplinary and Capacity for Membership Scheme.

The first port of call in all circumstances however is to offer help to remedy the problem and support IFoA members in carrying out excellent standards of learning.

## **Contact Details**

If you have any further queries, please contact us at: [regulation@actuaries.org.uk](mailto:regulation@actuaries.org.uk)

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