



Institute  
and Faculty  
of Actuaries

# Professional Skills Training

## Review of Content and Delivery

### 2017/18

**Professional Skills Sub-committee**

November 2018

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## 1. FOREWORD

This report provides an overview of the roll out of professional skills content and events over the 2017/18 CPD year. It also captures some of the feedback and an analysis of feedback on the various components that make up the IFoA's professional skills programme for Stage 3 professional skills for experienced members.

Members of the Professional Skills Sub-committee 2017/18:

Volunteers:	Malcolm Slee (Chair)
	Graham Black
	Richard Galbraith
	Jenni Stott
	Neil Walton
	Richard Winter
Executive:	Fiona Goddard
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	Sally Calder

We are also grateful for the contributions of actuary practitioners and other professionals who contributed by participating in filmed discussions or co-presenting at conferences. The content has been widely accessed and delivered with helpful feedback from users, both positive and constructive. This feedback is much appreciated by the group and strongly influences our approach going forward.

We are keen to adopt new formats for delivery and are pursuing some ideas with the help of our trusted suppliers.

As always any input from practitioners as to what they consider could usefully be included in the professional skills programme is most welcome, in particular, any ideas for future case studies and vignettes.



**Malcolm Slee**  
**Chairman, Professional Skills Sub-committee**

## 2. BACKGROUND

- 2.1 The Professional Skills Sub-committee (PSSC) develops content to assist members meet the Stage 3 Professional Skills Training for Experienced Members requirements. Their remit includes delivering the content at Professional Skills Training (PST) events, sessions at IFoA conferences, seminars and webinars.
- 2.2 The Stage 3 requirements were introduced in 2013 and to date content has been developed on the following topics:
- 2013/14 Conflicts of interest
  - 2014/15 Speaking up, whistleblowing and an open culture in organisations
  - 2015/16 A variety of ethical issues including:
    - Capital Modelling
    - Treating customers fairly
    - Personal conflicts
    - Due diligence under time pressure
    - Speaking up about concerns
    - What information can you take with you to a new employer
  - 2016/17 Ethics for actuaries:
    - Conflicts of interest in different contexts
    - Good governance and meeting management
    - Potential challenges encountered by sole traders and actuaries in smaller firms
    - Respecting confidentiality
    - Work review – the do's and don'ts
    - Internal processes and policies, professional standards etc. – how do you get the job done?
  - 2017/18 Actuarial Interaction and challenge
    - Dealing with issues around commutation factors
    - Professionalism in the workplace; others taking credit for your work
    - Ethical and legal issues around big data and data analytics
    - Competence and care issues when accepting work
    - Dealing with a situation where a boss steps in and vehemently blocks a course of action the actuary is championing (context is regulation around discount rates)
    - Competence and care issues around moving into a new field and raises awareness of the potential financial impact of climate change
    - Pressure from trustees to switch to a different firm using a different Economic Model which generally leads to a higher discount rate than that being proposed by the Scheme actuary for the scheme's triennial valuation.
    - Bringing the IFoA risk alert on reserving to life, by introducing a company that may be falling down on the process. (Different to previous reserving scenarios, which have tended to focus on "undue pressure" – this one questions technical competence).
    - Manipulation of models drawing on the guidance produced by the IFoA around Actuarial Software Calculations and professional responsibility.

- Dealing with professional issues in the context of a regional life office in Singapore with multiple nationalities, languages, members of different professional bodies etc., thereby addressing diversity issues. This video was filmed in Malaysia using local actors for authenticity.

In addition to the above videos, a video presentation of regulatory key messages, a professional skills video and 7 animated comic strips depicting mini case studies were developed.

2.3 Topics for the 2018/19 year are varied and a number of the topics covered were included in response to feedback in this report. The videos were published on 21 September 2018 under the title “Getting it right!”

- 2018/19

- **A meeting of minds:** This video deals with behaviours, respect for others and the need to call out inappropriate behaviours in the context of an annual valuation assumptions meeting of an insurance company.
- **Bored Board:** Deals with a NED joining a Financial Services Risk Committee. What is his role, working within his area of competence, applicability of the Code, speaking up etc.
- **Head to Head:** The Chief Reserving Actuary presents a range of reserves at an annual meeting. After being challenged he suggests a narrower range. However the Finance Director is clearly not happy and seeks advice from an actuary friend. At a subsequent meeting she then proposes setting the reserves at a much lower figure.
- **Blog:** An employee within the motor pricing department of a GI Insurance business, part of a large composite insurer, writes a blog on various topics regarding motoring under the pseudonym of “Calculus Pete”. He’s clearly using insider information and his colleague begins to get suspicious about the content and detail contained in the blogs.
- **Rocky:** Deals with a negotiation on pricing between Brokers and the Insurance company – both are in it to get the best price.
- **Contribution Conundrum:** Frank, a newly appointed Scheme Actuary, meets his clients who have an exciting business plan in place to grow their business and envisage the deficit in the pension scheme being paid off in 2 years’ time. Frank has different views to those of his predecessor and his clients are not happy!
- **Letting off steam:** Deals with a hostile client relationship. The client thinks things should be done her way as she is paying, but the Board is the ultimate client and the actuary leading on the project on behalf of the consultancy needs to fulfil her duties to the Board, making sure they get all the relevant info they need in the report.
- **Mirror Mirror:** A client reports their actuary to the IFoA on the grounds of incompetence. Both have a different view of the remit and the course of a particular meeting between the two parties. Both are awaiting fact finding interviews with the IFoA’s appointed investigating actuary.
- **All in a day’s work:** Set in South East Asia, a recent recruit lets slip that she is about to download a comprehensive comparison tool from her previous employment. Her boss intervenes and sets up some scenarios to test her professional judgement.

- **Keep the boat steady:** Set in Nairobi, a qualified actuary with experience of working in a more developed market/insurance industry (in this case the UK) is attending a follow up interview with an insurance company. They were impressed with his experience and skills and think he can help them to finesse their processes without stirring things up too much. At the end they are keen to employ him, but he is having some doubts.

### 3. 2017/2018 VIDEOS

3.1 Our aim is to have entertaining and, at the same time, educational videos which generally are well received. The videos can be viewed as stand-alone videos.

#### 3.2 Statistics

For 2017/18 ten videos, two animated presentations (Regulatory Update and Professional Skills) and 7 cartoon strips were developed. Each of the ten videos had accompanying follow-up discussion videos. Sub-titled versions of all the videos are available.

The videos have been used extensively at IFoA events (conferences, CHIPS, CIGI, HILA, etc) and figures are shown below relating to member attendance to the extent we have been able to ascertain this. We developed a Train the Trainer video and Toolkit for representatives from organisations to encourage them to run in-house events using the videos, which has also resulted in a considerable number of members accessing the videos in groups.

	2013/14	2014/15	2015/16	2016/17	2017/18
Total videos produced	22	10	10	7 + 5 line drawings	10
Online videos - viewings	75,651	73,190	42,975	64,902	60,554
IFoA events –attendees	1,943	4,410	5,063	3,959	4,951
In-house events -attendees	1,423+	1,785+	3,620+	3,955+	4,127+
Facilitation packs issued	n/a	80	108	123	80
Webinars – participated	n/a	n/a	564	777	1,270
Webinars – video hits			1,541	1,054	349

Numbers attending in-house events will be considerably higher in reality as only 59% of the firms who requested the toolkit provided information on events run and numbers attending.

Although webinar video hits (i.e. post event views) are much lower in comparison to the previous year, this is largely offset by the increased number of actual participants on the day. We do however feel that there could have been more publicity around the availability of the webinar video.

#### 3.4 Feedback on video content

There is an opportunity to complete a feedback form after viewing each video however it is not mandatory to complete the form. The responses from the 261 members who submitted feedback are shown below. We have summarised questions 7 and 8 but will provide all comments received if required. We responded individually to members who raised specific points.

3.5 The overall tone of the feedback is very positive:

- 94% rated the quality of the videos Excellent or Good
- 97% found the follow-up discussion videos useful (It is worth noting that this was the first time we had introduced the new format of having actuary practitioners and, where appropriate, other professionals discuss the issues raised in the video.)
- 85% gave an Excellent or Good rating for realistic portrayal

**Q1: Did you find it easy to access the video?**

Answer Options	Percent	Response Count
Yes	94%	245
No	6%	16

**Q2: How would you rate the quality of the content?**

Answer Options	Percent	Response Count
Excellent	55%	143
Good	39%	103
Satisfactory/Fair	5%	14
Poor	1%	1

**Q3: Did you find the discussion points/follow up material useful?**

Answer Options	Percent	Response Count
Yes	97%	253
No	3%	8

**Q4: How well did the scenarios portray issues that you might face?**

Answer Options	Percent	Response Count
Excellent	46%	119
Good	39%	103
Satisfactory/Fair	13%	34
Poor	2%	5

**Question 5: How would you rate the overall online experience?**

Answer Options	Percent	Response Count
Excellent	51%	132
Good	43%	111
Satisfactory/Fair	5%	14
Poor	1%	4

**Q6: How did you access the videos?**

Answer Options	Percent	Response Count
Home	69%	179
Work	22%	57
Mobile	9%	25



### Q7: Please comment if you experienced any technical issues accessing the videos?

#### Themes from comments:

- There were some issues whereby the claim button for CPD wasn't activated – ***All reports of these issues were dealt with promptly by the VLE Co-ordinator.***
- There were a couple of comments around difficulty in locating material on the IFoA website – ***We have worked with colleagues in the Communications Team to endeavour to make the content on the website clearer to navigate to the videos. A separate tile to access each video has been included within the professional skills online learning pages.***
- It was suggested that making the videos available to download from the VLE would be helpful rather than watching online. - ***It is IFoA policy not to make the videos downloadable from the website to retain some control over the circulation of the content, we will however supply downloadable links if contacted.***

### Q8: Any other comments?

#### Themes from comments:

- There were some requests for transcripts of the videos – ***Transcripts were sent on request. We have also made it clear on the website page that transcripts can be made available.***
- There was a comment that the discussion points for all PST 2017/18 videos lasted too long – ***We took this on-board when developing the follow-up discussion videos for 2018/19 material, however by necessity, some of the follow-ups are longer than others.***
- Overall, feedback has been very positive, some examples of comments are listed below:
  - *“The quality and usefulness has improved significantly. Adding the discussions after the videos is a big improvement and the situations covered seem more topical and up to date and the casting is better. Well done!”*
  - *“It was very much helpful in updating my knowledge and working experience. It has helped me a lot in changing my thinking and working. It has also opened the way of professional thinking.”*
  - *“Having the additional video online discussion of the scenario is a step improvement on past years professional skills videos. An excellent idea!”*
  - *“Please continue to provide this type of content. It is really helpful for those of us located outside the UK who cannot access live events at the IFoA. In addition, it's just great to hear relevant scenarios hashed out with a skeleton structure and or approaches that come directly from the Institute. This is very much appreciated.”*
  - *“I have found the content of the 2017/18 PST videos excellent - the discussion sections afterwards with industry/IFoA figures has been particularly useful. Would welcome more scenarios in the same manner next year.”*

## 4. FACE-TO-FACE EVENTS

- 4.1 17 Professional Skills Training events were delivered in London and Edinburgh from November 2017 through to June 2018 of which 680 attended and 179 (26%) responded to the feedback survey below.
- 4.2 Members of the General Counsel team used the video case studies at Current Highlights in Pensions (CHIPs), Current Issues in General Insurance (CIGI), Current issues in Life Assurance (CILA) and Highlights of Life Assurance (HILA) sessions. The CEO and President used the video case studies at the Asia conference in Hong Kong in May and the General Counsel used the videos at the Africa Roadshow that included sessions in Mauritius, Nairobi and Kenya.
- 4.3 The PSSC had plenary sessions at all the IFoA conferences.
- 4.4 A schedule of IFoA events where the video case studies have been used to deliver professional skills training sessions is shown at **Appendix 1**.
- 4.6 Feedback from face-to-face events is consistently positive as in previous years:
- 92% claimed the events met their expectations
  - 93% of those who responded rated the events Excellent or Good
  - 95% found the duration (2 hours) of the events 'just right'
  - 97% of attendees found the format good

### Q1: Did the professional skills event provide what you were led to expect from the advance publicity?

Answer Options	Percent	Response Count
Yes	92%	164
Partly	7%	13
No	1%	2

### Q2: Overall how did you rate the event?

Answer Options	Percent	Response Count
Excellent	47%	83
Good	46%	82
Satisfactory	6%	11
Poor	1%	3

### Q3: Was the duration of the professional skills event

Answer Options	Percent	Response Count
Just right	95%	169
Too long	3%	5
Too short	2%	3

### Q4: Would you prefer these sessions

Answer Options	Percent	Response Count
In the morning	7%	12
Over lunchtime	4%	8
In the evening	77%	138
No preference	12%	21

### Q5: Do you think the professional skills event format is good?

Answer Options	Percent	Response Count
Yes	97%	174
No	3%	5

### Q5 Themes from comments:

- A few comments were received on the layout of the room for PST events – i.e. preference for cabaret style rather than theatre style. **As this issue was raised in previous years, the majority of PST events are now cabaret style with only the 2 PST events in London in June being theatre style – we have seen a trend where members leave it quite late in booking for an event by the end of the CPD year and having theatre style allows 130 attendees as opposed to 60 in Staple Inn in London.**

### Q6: What professional skills topics would you like to see covered in future professional skills events?

#### Themes from comments:

- How to deal with an ethical situation and what might go well or not so well as it gets resolved.
- Conflict between peers who are at the same level of hierarchy in a company/conflict between colleagues who are also friends.
- Anonymised case study where IFoA support was asked for / disciplinary cases.
- Problems facing actuaries working in very small organisations that employ only one or two actuaries.
- Interpretation of APS X2.
- Real professionalism issues.
- Actuaries undertaking work in wider fields.
- Treating customers fairly.
- More speaking up examples.
- Broader considerations of business ethics in addition to the case studies centred on individual actuaries, bearing in mind many actuaries make decisions as managers of firms.

- Topical themes such as current environment of Pensions Freedom and significant publicity from the regulatory on this could keep the focus on professional issues but also get people to think about it in a more real way.
- Case studies for different practice areas.

#### Question 7: Please give your opinion on the speakers

Answer Options	Percent	Response Count
Excellent	45%	81
Good	47%	84
Satisfactory	7%	13
Poor	1%	1

#### Themes from comments:

##### Mainly positive:

- *“The speakers really enlivened the session, dropping in the occasional thought-provoking comments.”*
- *“I thought the presenters were very good. They were very enthusiastic and kept the evening flowing. It can sometimes be difficult at these events to get people to speak up but they did a good job of getting lots of different people to participate.”*
- *“They were very good at inviting/encouraging comments from a range of people, summing up themes and posing follow-on ideas to get into more depth. The two presenters were well rehearsed and handled effectively the group discussion within the hall.”*
- *“The presenters did a great job at stimulating a lively debate in the room.”*

##### Suggestions:

- *“It would have been nice to get the speakers' views a bit more - they tended not to add much to what was said on the floor after the case studies.” **The presenters generally try to encourage debate without getting into giving an “IFoA view”. They do however give a steer with regard to better approaches and where a suggested approach would be wrong.***
- *“There was too much emphasis on the 2 hours CPD - lines like constantly implying people were only there to get CPD and lines like 'well done you've managed to attend in May rather than June'. If the Institute believes this is valuable training (which I do), it must stop over referencing the 2 hours, it only devalues the overall training.” **The PSSC have agreed to avoid any such remarks going forward and to focus more on the positive benefits of participating in such sessions.***

#### Question 8: Please give your opinion on the content

Answer Options	Percent	Response Count
Excellent	41%	73
Good	49%	87
Satisfactory	8%	15
Poor	2%	4

**Themes from comments:**

Feedback mainly positive:

- *“Interesting and thought provoking.”*
- *“I think the videos are extremely well done, and always generate a huge amount of discussion with very little prompting. Topics are very current and real.”*
- *“Good stimulating discussions due to good content, particularly scenarios presented were realistic and credible.”*

Suggestions:

- *“Include a video which is not a 'traditional actuarial' scenario.”*
- *“Can we have more varied scenarios and less extreme and therefore more relatable to day to day work.”*

**Question 10: What will you do differently as a result of attending the PST event?**

**Themes from comments:**

- *“Nothing, but it’s good to have the events as an annual refresher of professional skills.”*
- *“I will be more confident in maintaining my professional stance in challenging situations.”*
- *“Better planning. Being bold and speaking up is something I’ll be keeping front of mind.”*
- *“I will think more about ethical issues on day-to-day basis (rather than just when I have an ethical dilemma.”*

**Question 11: Any other comments?**

**Themes from comments:**

- *“Would have been nice to have a glass of wine afterwards so we could have continued our discussions.”*
- *“Good event overall. One minor comment - I noticed that there were lots of free spaces, although when I tried to book spaces on event it always said it was full. I think the profession should not allow members to multiple book such events as it makes it difficult for others who would like to come being excluded. Some colleagues from the office would have liked to come but couldn't register as it kept saying "event full" when this clearly wasn't the case. Appreciate this is difficult to monitor, but surely the profession can ensure people do not multiple-book these events and not turn up.” **This year we will be staggering release of the events to try and fill the events earlier in the year and stop people booking multiple events and then not turning up to the earlier ones. We are also encouraging events colleagues to overbook by a small number.***
- *“It is good to attend events like this with actuaries from different backgrounds that you don't get from company organised professionalism events.”*
- *“Surprising good fun. Really enjoyed meeting new people and discussing a range of quite tricky situations. Well presented and helpful.”*

### **Suggestions:**

- *“The 'one size fits all' approach to PS training has run its course. Needs a new, more targeted approach so that older lads like me can actually get something useful from the training.”* **Material has been developed for NEDs and members thinking about becoming NEDs (“Bored Board” video and illustrated vignette “In the press”). Other CPD events have specifically been targeted at NEDs such as “Good Ethics and Good Business – The Challenge for Actuary NEDs” on 24 May, although this did not originate from our group.**
- *“Please try not to use the same videos that have been used at IFoA organised conferences”.* **As far as possible we try avoiding using videos that have been used at conferences, CHiPs, etc. although we did allow the presenters some flexibility in the materials they use. We have changed this policy to being more directive about what should be used in scheduled PST events.**
- *“I think there are a lot of ways to offer this sort of course but not sure any are better than what we have, so don't waste time in redesigning the format etc. In my view the key thing is to get actuaries, and maybe senior students, together in 1 place to interact and share views so I would try to discourage allowing people to do their professional CPD by just watching a film alone or in the company of a few colleagues they know well. Hold it during the working day - it is free CPD, and necessary to do the job, so employers should be happy to release staff”.* **Feedback has consistently indicated that Members prefer an evening event as opposed to morning or lunchtime sessions.**

## 5. TOOLKIT

A Toolkit was developed to support the videos and this was made available to organisations on request. Of the 80 toolkits issued, 47 organisations advised re numbers attending a session but only 33 (41%) completed the feedback survey. Some members advised how many attended events but didn't complete the survey. We met with some members who had submitted comments to discuss potential suggestions. A schedule has been compiled from the survey responses listing the in-house sessions run using the toolkit at **Appendix 2**.

### Key points:

- Users found the Toolkit really helpful and easy to follow
- Users liked that they were able to download the video files from the links provided
- Users found the option of having the videos embedded in the template presentations very useful

### Question 1: Did the Toolkit and/or the Train the Trainer session adequately equip you to deliver the event?

Answer Options	Percent	Response Count
Yes	100%	33
No	0	0

### Question 2: Does the format work well?

Answer Options	Percent	Response Count
Yes	100%	33
No	0	0

### Themes from comments:

- Users felt that the videos were well made and generally had the right level of humour and seriousness.
- General feedback was that there was a good mix of videos, quizzes and other material that could be tailored to make relevant for different audiences.
- Users liked the follow-up discussion so that they could see the discussion of the points (and see if there was anything they had missed / didn't agree with!).

### Question 3: What didn't work so well?

### Themes from comments:

- Some comments received suggested that the follow-up discussion videos didn't add anything over and above the notes. **The follow-up discussion videos are mainly developed for those members viewing the videos on their own rather than for organisations using for an event. We have made this clear in the new Toolkit.**
- Some users didn't like the Regulatory Update video. **Due to the low number of hits on the website, we have not developed a Regulatory Update video for 2018/19 but may do so at an appropriate point when we have important issues to communicate such as around the proposed AMS.**

- There was a comment that all the questions were at the end of the videos and not after each segment. **Questions will be inserted after each segment where videos have been split into separate segments.**

**Question 4: Overall, how did you rate the Toolkit?**

Answer Options	Percent	Response Count
Excellent	73%	24
Good	27%	9
Satisfactory	0	0
Poor	0	0

**Question 5: Overall, how did you rate the participants' feedback?**

Answer Options	Percent	Response Count
Excellent	52%	17
Good	48%	16
Satisfactory	0	0
Poor	0	0

**Question 6: Suggestions on how to improve the format:**

- Overall, the comments received were very positive and most thought the format worked well and that the toolkit was an extremely useful set of resources which made providing the professional skills training fairly easy.
- Some suggestions referred to the follow-up/discussion videos – they felt that a lot of time was spent recapping the contents of the main video. **We took this on-board when filming the 2018/19 follow-up discussion videos however, where there are more issues to discuss, the follow-up videos are inevitably longer.**
- There was a suggestion to include videos that show consequences of different decisions made. **This year's 'Contribution Conundrum' does this and we have used this format previously ('A principled approach or the easy option' in 2014/15).**

**Question 7: Please add any other comments**

**Themes from comments:**

Mainly positive comments:

- *"The facility for downloading the videos was much easier to use this year. The content was excellent, and made for a good 2 hours of discussion. In particular, I hadn't anticipated how much discussion the quiz on the Actuaries' Code would generate, so that is definitely something to include again in next year's content."*
- *"It is a really great piece of work and makes my job that much easier."*
- *"This was such an improvement on previous years. Thanks for all your efforts on this. It was very much appreciated and reduced the leg work required to run the session."*
- *"I've run several of these sessions and they are well attended and valued as a good way of discussing professional issues and meeting CPD requirements in an effective way."*



## 6. WEBINARS

6.1 A total of 1,270 participated in the webinars (708 in the morning session and 562 in the afternoon session) of which 209 (16%) responded to the survey below. A further 349 viewed the videos that were made available of the webinars.

### Question 1: Do you think the webinar format was good?

Answer Options	Percent	Response Count
Yes	96%	121
No	4%	6

#### If no, please comment:

- Some members experienced technical difficulties – **Members were advised that webinars would be made available on the IFoA website.**
- Events like this are being scheduled too late in the CPD year – **The webinars are scheduled for early June to allow members who have not had the opportunity to attend an event to get their professional skills CPD requirement by 30 June.**

### Question 2: Please give your opinion on the content (morning)

Answer Options	Percent	Response Count
Excellent	81%	103
Good	15%	20
Satisfactory	2%	2
Poor	2%	2

#### Summary of comments:

- Although some members had already seen the video, they felt it didn't detract too much from the overall benefit of the event as it explored different aspects.
- Members liked the poll questions / voting.
- Members found the webinar engaging, interactive and educational.

### Question 2: Please give your opinion on the content (afternoon)

Answer Options	Percent	Response Count
Excellent	78%	64
Good	21%	17
Satisfactory	1%	1
Poor	-	0

#### Summary of comments:

- Members found the content informative and liked the polls.

### Question 3: Please give your opinion on the panel (morning)

Answer Options	Percent	Response Count
Excellent	84%	107
Good	15%	19
Satisfactory	-	0
Poor	1%	1

#### Summary of comments:

- Members thought the panel were professional in their discussions and liked hearing opinions from diverse panel.

### Question 3: Please give your opinion on the panel (afternoon)

Answer Options	Percent	Response Count
Excellent	81%	66
Good	18%	15
Satisfactory	1%	1
Poor	-	0

#### Summary of comments:

- Good mix of people with broad range of knowledge, stance and views – which were well presented.

### Question 4: What professional skills topics would you like to see covered in future professional skills events?

#### Summary of suggestions:

- Conflicts of interest
- Whistleblowing and speaking up
- Actuaries' Code
- TASs
- Business ethics as well as professional ethics.
- More webinars on current actuarial issues, new regulations, new product as well as developments in the profession
- Actual case studies from Tribunals, and their outcomes
- Examples as close to actual situations as is practicable - ones that make you think 'that could happen to my clients'

### Question 5: Any other comments?

#### Summary of comments:

- Members found the webinars to be a good format for fulfilling CPD requirements.
- Members liked the interactive polls and Q&A sessions.

#### Mainly positive comments:

- *“Really impressed with the quality of the webinar ‘production’ – it is extremely high quality considering the number of participants ‘on the line’..”*
- *“I felt this was an hour well spent providing quality CPD.”*
- *“Role play scenario video makes the content come to life and the subject more engaging. Also like the polls which helps facilitate discussion.”*
- *“Really useful way to present the topic, particularly for those who need to work from home and can be quite restricted in events they can attend.”*

## **7. SUMMARY**

### **7.1 Online videos**

Feedback has been positive overall with many commenting that the videos improve each year. We took on board comments regarding the follow-up discussion videos and changed the format such that there is a panel of actuaries/practitioners discussing the video rather than a scripted text being read out. Members have commented that this has been a big improvement. Members liked that there is an option to view the videos with sub-titles.

### **7.2 Face-to-face events**

Feedback on the face-to-face events continues to be very good both in terms of format and content. The change to round table seating has been welcomed and the quality of the speakers has been favourably commented on. We have experienced a substantial amount of 'no-shows' at events and we are liaising with Events Team colleagues on how best to address this issue and have introduced some changes such as phasing the events for booking and overbooking by a margin. We will monitor the effects of these changes over the year. In the year under review we had approximately 1,000 members more attending face to face events.

### **7.3 Train the Trainer & Toolkit**

As the take up for Train the Trainer sessions was in decline, we developed a Train the Trainer video rather than running sessions. The Toolkit continues to be very popular with those running in-house events for colleagues – they appreciate that there is a lot of material included in the Toolkit that they can tailor to suit their own organisation. In particular they appear to appreciate the template presentations that are included and especially where the videos are already embedded. In the year under review the numbers attending such events showed a slight increase over the previous year.

### **7.4 Webinars**

The Professional Skills webinars continue to be very popular. Feedback has been that the webinars are engaging and informative and, in particular, members like the poll/voting questions and the option to pose a question online. There is demand for more webinars/something similar and the PSSC is considering what other options to explore.

## Schedule of IFoA Events – 2017/2018

## APPENDIX 1

Below is a schedule of events run by the IFoA where the professional skills training videos have been used.

Date	Company/Venue	No.	Presenters
16-18/10/2017	GIRO Conference – Edinburgh	-	<i>*see note</i>
09/11/2017	CHIPs – Glasgow	46	Neil Walton
16/11/2017	CHIPs – Bristol	50	Unable to provide presenter
23/11/2017	CHIPs – London	99	Sally Calder
23/11/2017	PST event – Edinburgh	23	Helen Gregson
23/11/2017	Life Conference – Birmingham	53	Regulatory slot -Elena & Stephanie
24/11/2017	Life Conference – Birmingham	1,008	Final plenary -Malcolm Slee, Chika Aghadiuno, Ben
30/11/2017	PST event – London	96	Richard Winter & Jenni Stott
30/11/2017	CHIPs – Leeds	71	Malcolm Slee
12/12/2017	PST event – London	58	Richard Galbraith & Malcolm Slee
14/12/2017	PST event – Edinburgh	25	Neil Walton
23/12/2018	PST event – London	61	Richard Galbraith & Helen Gregson
22/01/2018	Derek’s trip to Beijing, Shanghai & Shenzhen	53	Derek Cribb
25/01/2018	PST – Edinburgh	30	Neil Walton
15/02/2018	PST event – London	55	Jenni Stott & Sally Calder
21/02/2018	PST event – Edinburgh	24	Helen Gregson
14/03//2018	PST – London	55	Malcolm Slee & Sally Calder
20/03/2018	Highlights of Life – Edinburgh	87	Malcolm Slee
28/03/2018	PST – Edinburgh	23	Helen Gregson
28/03/2018	Highlights of Life – London	162	Malcolm Slee
17/04/2018	PST event – Edinburgh	31	Sally Calder
23-27/04/2018	Africa Roadshow – Mauritius (50), Nairobi (47) & Lagos (47)	144	Ben Kemp
26/04/2018	PST event – London	60	Jenni Stott & Helen Gregson
08/05/2018	CILA – London	199	Malcolm Slee
10-11/05/2018	Asia Conference - Bangkok	177	Ben, Derek Cribb & Colin Wilson
10-11/05/2018	Asia Conference – Hong Kong	80	Ben Kemp
17/05/2018	CIGI – London	165	Nylesh Shah
21-23/05/2018	Protection, Health & Care Conference – Brighton	50	Richard Galbraith & Helen Gregson
23/05/2018	PST event – Edinburgh	29	Neil Walton
31/05/2018	PST event – London	70	Sally Calder & Malcolm Slee
05/06/2018	Pricing Seminar	18	Richard Winter
4-5/06/2018	Pensions Conference - Birmingham	90	Malcolm Slee & Sally Calder, Ben Kemp
07/06/2018	Professional Skills Webinars – morning	708	Des Hudson, Marcia Cantor-Gable, Jules Constantinou & Sally Calder
07/06/2018	Professional Skills Webinars – afternoon	562	Des Hudson, Marjorie Ngwenya, Malcolm Slee & Sally Calder
13/06/2018	PST event – Edinburgh	129	Helen Gregson
20/06/2018	PST event – London	110	Richard Winter & Sally Calder
20/06/2018	GI Reserving Seminar	95	Richard Winter
26/06/2018	PST event – London	115	Richard Galbraith & Sally Calder
27-28/06/2018	Risk & Investment 1 day Conference – Brighton	40	Malcolm Slee & Judith Joy
	<b>TOTAL</b>	<b>4,951</b>	

*\*GIRO Conference, Edinburgh 18 October 2017 – a Professional Skills plenary wasn’t required this year as Sir Win Bischoff made a presentation on ‘The importance of professionalism in today’s financial sector’ as part of the Professional Lecture Series*

## Schedule of In-house Events – 2017/2018

## APPENDIX 2

Below is a schedule of in-house events run by organisations/regional societies using the Toolkit. 78 toolkits were issued and 47 organisations responded via a survey (59%) - so in reality the numbers of attendees will be higher.

Date	Company/Venue	No.	Organiser/Presenter
22/09/2017	ACA Northern Conference	50	Malcolm Slee & Helen Gregson
22/09/2017	ACA Northern Conference	30	Susie Lyons
07/11/2017	Aviva CPD Day – York	135	Malcolm Slee
08/11/2017	Aviva CPD – Bristol	95	Malcolm Slee
17/11/2017	Legal & General	200	Graham Wardle/Helen Gregson
05/12/2017	SIAS: Commercialism -v- professionalism	5	Helen Gregson
07/12/2017	Asta	18	Matthew Locke
12/12/2017	BWCI, Channel Islands	30	Erin Bisson
12/12/2017	HCL Insurance BPO Services Ltd	3	Nicola Coles
13/12/2017	Travelers Insurance	20	Adam Chick
11/01/2018	Aviva CRO Group	8	Richard Galbraith
19/01/2018	Aviva	42	Richard Galbraith
25/01/2018	ACA Conference – Gatwick	90	Jules Constantinou
26/01/2018	SCOR UK	25	Sam Hughes
29/01/2018	JLT	12	Alison Kearns
30/01/2018	PPF	13	Sam Hughes
08/02/2018	Royal London (Edinburgh)	30	Neil Walton
23/02/2018	TransRe	7	Matthew Brown
05/03/2018	Aviva – York	71	Richard Galbraith
07/03/2018	Zurich – Swindon	32	Zoe Fewell
12/03/2018	Aviva	28	Richard Galbraith
20/03/2018	JLT	6	Alison Kearns
22/03/2018	XPS Pensions Group	21	Sam Fletcher
23/03/2018	Aviva	11	Richard Galbraith
23/03/2018	TransRe	7	Matthew Brown
27/03/2018	Aviva – global webinar	15	Richard Galbraith / Sally Calder
28/03/2018	Aviva – Professional Board	5	Richard Galbraith
28/03/2018	Just Rethink Retirement	26	San Yen Tan
04/04/2018	NFU	26	Caroline Alderson
23/04/2018	Just Rethink Retirement	25	San Yen Tan
24/04/2018	Bank of England	30	Richard Winter & Patrick Cleary
24/04/2018	Barnett Waddingham - Amersham	22	Michael Lawson
01/05/2018	ActEd	18	Darren Michaels/Lindsay Smitherman
03/05/2018	Steven Dixon Associates	11	Jennifer Osoata
06/05/2018	Friends First	11	Sarah Kearns & Avril Wilkinson
09/05/2018	Zurich	9	Angeli Cox
09/05/2018	Equitable Life Assurance	18	James Hogbin
10/05/2018	Capita	10	Debbie Barker
15/05/2018	Bank of England	30	Richard Winter & Patrick Cleary
15/05/2018	London Markets Actuaries Group (LMAG)	120	Richard Winter
16/05/2018	Prudential	17	Robert Gate

Date	Company/Venue	No.	Organiser/Presenter
16/05/2018	Rothsay Life	14	Cleo Taylor
16/05/2018	Prudential	6	Craig Tallis
16/05/2018	Aegon	16	Robert Gate
17/05/2018	Clydesdale Bank	6	Claire Green
21/05/2018	Legal & General	10	Aysha Patel/Martin Cullum
22/05/2018	Steven Dixon Associates	10	Jennifer Osoata
23/05/2018	Allianz Insurance plc	22	Joanna Howes
24/05/2018	Market International	20	Rory Galloway
25/05/2018	HSBC	25	Matthew Heaney
25/05/2018	PwC – Bristol	10	Andrea Nagy
12/06/2018	Aon	18	Ashley Uglow
14/06/2018	Aviva – York	48	Richard Galbraith
14/06/2018	KPMG – Leeds	15	Richard Galbraith
14/06/2018	Brit Insurance	20	Jennifer Blow
15/06/2018	RPMI	5	Katrina MacKay
18/06/2018	Aviva – London	10	Richard Galbraith
19/06/2018	Chubb	43	Shane O’Dea
20/06/2018	Direct Line Group	36	Stephen Ford & Klaas Sijbrandj
20/06/2018	Liberty Specialist Speciality	7	Yike Zhang
25/06/2018	Canada Life	48	Martin Bickers
26/06/2018	Star Stone	30	Helen Gregson
29/06/2018	Prudential	16	Robert Gate
29/06/2018	Aegon	17	Robert Gate
Various (5)	Lane Clark & Peacock	100+	Team set up to deliver events
Various (3)	Ernst & Young – Bristol	80	Nicola Scull
Various	PwC + clients	400+	Peter Hefferman
Various (6)	Punter Southall Group	84	Heather Simmons
Various	Hymans Robertson	140	Stuart Reilly
Nov & Dec	Aon Hewitt	56	Dave Hunt
March & April	Canada Life	48	Martin Bickers
March to June	Willis Towers Watson	175	Andrew Blain
April & June	Government Actuary’s Department	80	Joanne Meusz
May & June	Matrix Development Ltd / Phoenix Group	60	Barry Richardson
May & June	Sun Life Financial of Canada	50	Mandy Dixon

Regional/Overseas Societies			
Various (3)	MetLife GOSC – India	34	Nileema Somani
09/10/2017	Kuala Lumpur – Member CPD Event	120	Emma Gilpin & Caryn Chua
10/10/2017	Singapore – Member CPD Event	90	Emma Gilpin & Caryn Chua
December 2017	Nigerian Actuarial Society – Lagos	63	Richard Galbraith, Sundeep Raichura & Andrew Slater
February 2018	Cyprus Association of Actuaries	40	Helen Gregson
05/03/2018	Malaysia Actuarial Society	120	Emma Gilpin & Sally Calder
07/03/2018	Singapore Actuarial Society	90	Emma Gilpin & Caryn Chua
27/04/2018	Actuarial Society of Hong Kong	80	Pat Kum & Sarah Hui
16/05/2018	Friends First – Ireland	11	Avril Wilkinson

18/05/2018	Irish Society's Annual Convention	150	Sally Calder
24/05/2018	Birmingham Actuarial Society	40	Caroline Alderson
05/06/2018	Norwich Actuarial Society	45	Richard Galbraith
10/06/2018	Central Bank of Ireland	12	Bernard Lee
11/06/2018	Zurich Actuarial Society	70	Mark Cockroft
25/06/2018	Actuarial Association of Sri Lanka	25	Dr Milanthe Sarakkali & Malak Minhindukula Suriya
25/06/2018	Yorkshire Actuarial Society	30	Malcolm Slee
	<b>TOTAL</b>	<b>4,127</b>	