



## Continuing Professional Development Requirements

### Reflective Practice Discussions

#### **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**

The IFoA is committed to creating opportunities for members to benefit from reflective thought, and saw CPD as one area in which reflection could be utilised.

'Reflective Practice Discussions' have therefore been introduced in the CPD Scheme as a method by which members' professional development can be supported, recognising that the new CPD Scheme gives members greater freedom, but also increased responsibility, for their ongoing learning and development.

These two way exchanges allow members to reflect on their CPD activities, the learning outcomes of those activities and how they have applied what was learnt. They will discuss how they intend to approach future development and learning, including anticipated other work and roles.

The process allows the member to explore other ideas, get a fresh perspective and consider the possibility of the provision of support from peers or others.

Suggestions can be made in the course of the discussion on other methods by which objectives can be met and challenges can be presented to the conclusions that have been drawn.

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.

The discussion will leave the member with a more in depth understanding of the outcomes of the CPD activities and some action points on how they can do more meaningful learning.

#### **Reflective Practice Discussions for IFoA members**

The CPD Scheme requires members to take part in a reflective practice discussion every year with someone appropriate.

This document explains more about the concept and practicalities of those annual reflective practice discussions. It explains what to do before and what to expect during and after the discussion.

Case studies and other supportive materials are being developed to demonstrate how these discussions might work for members in different technical areas and at different stages of their careers.

In addition, some members will be asked to have a reflective practice discussion with the IFoA team (which will begin in September 2021). This note does not cover those discussions - more information relating to those discussions will be published in due course.

## **Before the discussion**

The discussion will cover all the member's CPD activities and is therefore likely to take place towards the end of the CPD year. However, to ensure that members get the most out of the process, it is suggested that planning begins early in the CPD year.

Members are responsible for identifying what their goals and objectives are for the CPD year ahead. 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?

These considerations will hopefully dovetail with employers' in-house appraisal processes and members are welcome to use that process to meet their obligations under the CPD Scheme. For those that are self-employed, work in small set ups, or perhaps are in employment where this process is not yet in place, they ought to take the time to self assess and think ahead for the year and where their work is likely to take them.

A plan can then be drawn up of activities and opportunities for learning and development. Members are required under the term of the Scheme to keep a record of their activities for the purpose of the reflective practice discussions. It might be worthwhile keeping a journal of activities and outcomes. This would facilitate reflecting about 'on the job' learning, which often arises during the course of meetings, whilst supporting or shadowing colleagues, or carrying out research.

The member has an obligation to ensure they are able to recall and reflect on all activities.

It is up to members to find an individual with which to have their discussion. The Scheme refers to this individual as the 'Appropriate Person' (discussed further below).

A date, time and method of communication need to be confirmed with the Appropriate Person well in advance. Reflective practice discussions can be held over the phone, video conferencing or in person. Members can provide the person with a copy of the record of their activities.

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

## **Identifying an 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 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 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 Appropriate Person ought not to shrink away from challenging the member on the conclusions they have drawn, but the purpose of the challenge is to prompt further consideration and not to present criticism.

The Appropriate Person need not be the same individual every year. Members are welcome to be 'Appropriate Persons' for each other. For those that cannot identify a person, the IFoA is setting up a pool of volunteers.

The Appropriate Person is not responsible for 'monitoring' or 'auditing' the CPD done by the member, but if they have any concerns as to the integrity of the IFoA member, they would be welcome to contact the IFoA to raise this.

The Appropriate Person does not require any training to fulfill this role, but would be advised to read this note, the material for Appropriate Persons (to be published in due course) and the CPD Scheme. If the Appropriate Person is a member of the IFoA they cannot count the time spent in carrying out this role towards their own CPD requirement under the IFoA CPD Scheme.

## **During the discussion**

During the course of the reflective practice discussion, the member might 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 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

Both parties will:

- confirm actions for the member to take away and consider.

A list of possible questions is at **Appendix A**.

## **After the discussion**

Where appropriate, there may be some follow up discussions about particular areas of development or to understand whether particular steps have been taken that were discussed in the discussion. This is at the discretion of the member.

Members can expect to have a better understanding of what the outcomes of their CPD activities were and take away some actions points.

This might mean looking at more diverse types of activities, other topics to cover, or other work to get involved with. The Appropriate Person can stay in touch with the member to support them in meeting these objectives.

These actions can feed into the plan the member makes for the forthcoming CPD year and influence their objectives and goals.

## **Practicalities**

### **Timings**

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 their activities and whether they met their learning objectives for the year.

Different members will require different lengths of discussion but the IFoA would envisage that most discussions will last no less than thirty minutes.

### **Location**

Discussions can be conducted over the phone, in person or via video conferencing.

### **Documentation**

Members are required to keep a record of their CPD activities for the purpose of the discussion, in the format of their choosing.

It may be useful to keep a record of the discussion which may help to help reflect on the past year and to help plan future learning activities, however this is not mandatory.

## **Contact Details**

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

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## 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?