



## The Institute and Faculty of Actuaries

### IFoA 'Appropriate Person' Pool - members

#### Background

As part of the IFoA CPD Scheme, all members are required to participate in a Reflective Practice Discussion with an 'Appropriate Person' every CPD year.

The IFoA recognises that not all members will be able to identify an Appropriate Person with whom to have this discussion. The IFoA has therefore established a pool of volunteers with whom members can have these discussions with.

#### What is a Reflective Practice Discussion?

A Reflective Practice Discussion is a two way exchange to allow a member 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.

#### What is the 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 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 should be an open and wide ranging discourse. The Appropriate Person should not 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.

#### Outcome of the Discussion

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.

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.

#### Process

The pool of Appropriate Persons is advertised on the IFoA website.

Members who are in need of an Appropriate Person will get in touch with the Person they think would be best suited to them. This decision could be based on that Person's role, previous experience, field of work, geographical location etc.



Institute  
and Faculty  
of Actuaries

It is up to the Person to decide whether to act as the Appropriate Person or not. It is also up to them to determine how many members and Reflective Practice Discussions to take on.

Discussions can be conducted over the phone or video. This should be agreed with the member.

The IFoA provides training to the volunteers in the pool but don't require any documentation from the Person nor any records to be submitted about the discussions held.

**February 2022**