Practising Certificates:
A guide to completing Practising Certificate applications

Contents

1.   Introduction

1.1.   This guide has been produced to assist current and future Practising Certificate (PC) holders in completing an application for a renewal or initial PC under the PC Scheme.

1.2.   Competency Frameworks for each PC are included within the [PC Handbook](#) and set out the competencies, skills and knowledge required to enable Members to carry out a PC role effectively.

1.3.   PC applicants are required to demonstrate, through completing the relevant application form or through an interview, that they meet, or continue to meet, all of the competencies under each competency heading as set out in the relevant Competency Framework.

1.4.   A competency-based criteria allows applicants to describe how they meet each competency, not only through describing their experiences of carrying out reserved work, but also by reference to other relevant work or roles that they have carried out as well as other activities such as training and volunteering.

2.   Completing an Initial PC Application Form

2.1.   When completing the initial application form, applicants are required to describe and evidence through examples how they meet each of the competencies under each competency heading as set out in the relevant Competency Framework.

2.2.   The descriptions and examples should include sufficient information to allow the IFoA to assess whether the applicant has demonstrated that they are competent in each area. This could be through describing how they have carried out a specific task, explaining their understanding of a certain topic, carrying out CPD to demonstrate their understanding of a particular area or describing situations where they have demonstrated the specific competency.

2.3.   It is possible that applicants will be able to address and cover multiple competencies in each example or other evidence provided, rather than necessarily having to demonstrate each competency separately.

2.4.   Applicants should include in the examples a description of the situation, what they were required to do in that situation, how they dealt with the situation and the end result.

2.5.   Applicants could consider the STAR technique when describing their examples:

- Situation: A recent situation where the applicant has demonstrated one, or more, of the competencies
- Task: What the applicant was trying to achieve from the situation
- Action: What the applicant did. In particular, the IFoA will be looking for information on what the applicant did, how they did it, why they did it and what the alternatives were (if any)
- Results: What was the outcome of the applicant's actions? What did they achieve through their actions?

2.6.   Applicants should ensure they talk about what *they* did in the situation being described rather than what their team or business did.

2.7. Applicants are required to demonstrate 'live' competency in each of the areas. Although the Scheme does not define specific time periods, applicants should provide sufficient evidence to show that their competencies are current, and this should be clear from the information provided. This could be done by providing dates or time periods in the descriptions or by simply explaining the competency in a way that clearly shows the applicant is currently competent in that area.

2.8. To ensure anonymity, applicants should try to avoid providing details that could allow them, their employer or the entity/syndicate/scheme they are describing to be identified.

2.9. As a guide, we anticipate the information provided for each competency will usually be under 500 words.

2.10. Example applications are available on the IFoA website to assist in completing the Initial PC Application Form.

3. Completing a Full Renewal PC Application Form

3.1. When completing the full renewal application form, PC holders are required to describe how they continue to meet each of the competencies under each competency heading as set out in the relevant Competency Framework.

3.2. The descriptions should include sufficient information to allow the IFoA to assess whether the PC holder has continued to demonstrate that they are competent in each area. This could be through describing how they have carried out a specific task, explaining their continued understanding of a certain topic, carrying out CPD to demonstrate their continued understanding of a particular area, carrying out training on a new area or describing situations where they have demonstrated the specific competency.

3.3. It may be more straightforward for renewal applicants to provide examples of situations where they have demonstrated each specific competency since their last full renewal, and they may also find the STAR technique (see 2.5 above) helpful in describing those examples.

3.4. PC holders should also ensure that it is clear from the evidence provided that their competencies remain current. This could be done by providing dates or time periods in the descriptions, by explaining the competency in a way that clearly shows they remain competent in that area or by simply stating that the examples or experiences are since their last renewal.

3.5. To ensure anonymity, applicants should try to avoid providing details that could allow them, their employer or the entity/syndicate/scheme they are describing to be identified.

3.6. As a guide, we anticipate the information provided for each competency for a PC holder will usually be under 300 words.

3.7. Example applications are available on the IFoA website to assist in completing the Full Renewal PC Application Form.

4. Hints and tips

4.1. Review our list of hints and tips before submitting an application:

➢ Provide, where possible, experiences where the competency has been demonstrated recently

- ➢ Make sure the descriptions are clear, concise and are relevant to the specific competency
- ➢ Ensure the information provided in relation to technical skills demonstrates a sound understanding of the relevant technical areas
- ➢ If helpful, consider wider experiences that could demonstrate a competency, for example, volunteering or CPD activities
- ➢ Review the descriptions to ensure they cover each of the competencies under each competency heading as set out in the relevant Competency Framework