Institute and Faculty of Actuaries

Establishing and running a regional group or network

Guidance and tips

January 2015

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Quick Start Guide

Overview	•The purpose of a regional actuarial group is to organise local events which provide IFoA members with the opportunity to network with their peers and to gain CPD credit. Most people find it easier to spread the load and get a few members together to help with arrangements i.e. set up a committee, but others are happy to get it started on their own. Either is fine. Noted below is all you need to do and the remainder of this pack will provide you with additional detail, if required.
Topic	•Decide on a topic you think people will find interesting.
Speaker	•Find a speaker to deliver this topic and ask them if they will speak at your event. Or, to get you started, why not use one of the online sessions available from the IFoA?
Venue	•If you have a suitable room in your office, you could host the event yourself or ask another employer of actuaries in your area if they would be willing to host it.
Date	•Find a date that is suitable for your speaker and when your room is available. Try to make sure this is at least three weeks in advance, to give sufficient notice to attendees.
Communication	•Create an email inviting members to attend and giving them details of timing, venue, topic, and how to book a place. Send this email to your network of contacts in your area and to the IFoA Regions Manager. Ask everyone to pass it on to others too.
CPD	•If your event may count for CPD purposes, provide a sign in sheet and ensure those who attend know how to access it if they need to provide evidence of their attendance.
Feedback	•At your event, you could seek feedback as to the desired frequency and topics for future events.

1. What is a regional actuarial group?

A regional actuarial group is a group of Institute and Faculty of Actuaries (IFoA) volunteers who have come together to support actuarial colleagues living and working within their local community, or with a shared cultural focus, and to provide them with a range of events and activities that will support them, and their careers.

The IFoA has an established network of regional groups and societies throughout the UK and a developing international network. Regional Actuarial Activity.

Each regional group is run by IFoA volunteers who organise a range of events. These can include technical updates and professionalism talks, social events and annual dinners.

The technical sessions can provide an opportunity for continuing professional development (CPD) as well as the opportunity to find out about new topics. The social events give members a chance to network in a relaxed environment.

2. The role of the Regions Manager

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The role of the Regions Manager is to support and develop existing regional actuarial groups and societies and to expand the network of regional actuarial groups internationally, helping to establish new groups where there are members willing to be part of a committee and to run events. The Regions Manager is Tess Joyce and she can be contacted at tess.joyce@actuaries.org.uk or +44 (0)131 240 1323.

Updating the webpage

It is the role of the Regions Manager to make sure the various regional groups and society webpages within the IFoA website are up to date. The Regions Manager liaises with a member of each regional actuarial group committee, who provides her with information on up-coming events and any committee changes.

Helping to source speakers

One of the main requests from regional actuarial group is for help in sourcing speakers for their regional events. The Regions Manager is responding to this request and is aiming to act as an information source for getting speakers and for sharing information on good speakers.

Providing guidance on topics

Similarly another frequent request from regional actuarial groups is “what are the hot topics at the moment?” The Regions Manager again acts as an information source for “hot topics” and can share ideas about what events other regions are currently holding.

Facilitating events from members of the IFoA Executive and external bodies

Each sessional year, members of the IFoA Executive or external bodies look to take key topics out to the regional actuarial groups for information or to gather views.

In the past, such events have included Professional Skills sessions to meet CPD requirements, IFoA Policy Managers gathering feedback for external consultations, information from the General Counsel team on Conflicts of Interest or the IFoA's new CPD Scheme.

When an area of the IFoA Executive wishes to take a topic out to the regional actuarial group network, the Regions Manager acts as the facilitator and key point of contact for the programme of events.

Providing liaison between the committee and the IFoA Presidential team and Council

Many regional actuarial groups and societies request a visit from one of the IFoA Presidential team or a member of Council at some point during the year. The Regions Manager is happy to act as the facilitator for these requests.

3. The roles within a regional actuarial group committee

A regional actuarial group usually needs a small group of people to get it up and running. However, it can be created by one or two enthusiastic individuals who recognise the value of bringing colleagues and contacts together for networking and development opportunities. While some existing groups or societies have committees with eight or 10 people on them, this size of committee is certainly not essential to have a vibrant and effective regional actuarial group.

When a regional actuarial group has a committee of people involved in running it, it usually allocates roles to individuals to allow more effective planning. These roles tend to rotate on a yearly or two yearly basis, but this is up to the committee.

Main Roles

President/Chair – Each regional actuarial group generally has a President or Chair. The role of this person is to be the figure-head for the group. They usually chair any committee meetings and, when present at events, act as the Chair.

Secretary – This role is the main administrator for the group. This person will normally be responsible for maintaining the membership records correctly and securely. If the committee takes minutes at their meetings, it is the Secretary's role to take the minutes and then circulate the agreed version. They are often the main point of contact for the Regions Manager.

Treasurer – If the group collects subscriptions for membership or charges to attend events it may appoint a Treasurer. It is helpful if this person has experience in maintaining financial records.

Committee members – These people are the main supporters of the regional actuarial group. They help run events, source and/or provide venues and speakers. Many groups rotate the arranging of events among their committee members to help spread the work load. Some groups also appoint an individual from each of the key employers in their area.

Other roles

Student Liaison Representative – This person acts as the link for student members of the IFoA to the regional actuarial group or society. They may also organise events specifically for student members or study support groups. This person may sit on the IFoA Student Consultative Forum.

Many regional actuarial groups near a university teaching subjects relevant to an actuarial career, maintain links with the appropriate university faculties. The Student Liaison Representative will develop and maintain links with these faculties and encourages students to come along to group events.

Talks Convenor – Some regional actuarial groups that organise a lot of events and also have a large committee may appoint a Talks Convenor to overview their events programme and be the main point of contact for sourcing venues and speakers. They don't do all the work but act as the co-ordination point.

Marketing Convenor – As with the Talks Convenor, groups that organise a lot of events and also have a large committee may appoint a Marketing Convenor to be the main person to promote their events and activities.

4. How to maintain a contact distribution list

The membership of a regional actuarial group is the life-blood of that group. Without an active core of people who attend and support events a group will struggle to survive.

There are three main methods for maintaining details of a regional actuarial group's membership and for contacting its members.

Individual members/records

Some regional actuarial groups keep details of each individual member, including their preferred email address. If the group plans to maintain its membership details like this then it is essential for good governance and confidentiality reasons that the members are aware their contact details are being kept for this purpose and that the records are kept in a secure manner.

When contacting the membership using a bulk email method it is vital that the bcc – blind copy – facility is used otherwise every individual's emails will be visible for all recipients to see.

We also recommend that the group refresh this contact data on an annual basis to make sure that the contact details are as up to date as possible.

Using key employer contacts

Some regional actuarial groups do not maintain the records of each individual member, but use a network of key contacts within local actuarial firms to communicate with their membership.

This network of individuals acts as the distribution channel for all information on events and activities.

To maintain an effective communication channel this way it is good practice that if a contact leaves they are replaced immediately by a colleague in the same firm, or if that is not possible, sensible handover arrangements are implemented with a colleague in another firm.

A mixture of both

Some regional actuarial groups use a mixture of both of these methods to communicate to their members.

Support from the IFoA

Support is also available from the IFoA Executive staff who can send out messages and communications on behalf of a regional actuarial group to a geographic distribution of members. Due to the UK's data protection regime requirements it is not possible to provide members' contact details directly to regional groups or societies.

5. How to hold a committee meeting

Each regional actuarial group has their own unique personality and each President or Chair will run meetings slightly differently.

It is up to each group to decide how often they want to hold committee meetings. Some regional actuarial groups hold a planning meeting at the beginning of each sessional year while others plan their events on an on-going basis. The frequency and nature of the meetings should be decided by the committee with guidance and direction from the President or Chair.

Key tasks for the President/Chair

- ensure any agenda and papers are issued in good time
- agree actions, deadlines, and who will take them forward
- ensure someone, usually the Secretary, keeps minutes
- be inclusive and think of ways of running the meeting to make the best use of time
- focus on outcomes – what do you want to achieve and by when?

Plan ahead

Each committee should make sure that there are sufficient meetings over the sessional year, for the group to be relevant, supportive and engaging and it should give committee members as much notice as possible of planned meetings.

Creating an agenda will help the committee to plan their meeting and allow sufficient time for contributions from all members and for decisions to be taken. It is also good practice to place important items at the start of the meeting.

Getting the best out of all contributors

The President or Chair should try to act as mentor to anyone who would like to consider becoming a President or Chair in the future. This may help other committee members take on new challenges and not only provide additional support but add to their personal development and enhance their committee and volunteer journey.

General good practice for committee members

Committee members should come to the meeting prepared. Take time to read any papers, raise questions which need clarification and provide any comments on the minutes in advance. Also be sure to complete actions and be ready to participate.

6. How to run an event

Running events is usually the main activity of a regional actuarial group.

Events can be social and/or technical in nature and it is up to the regional actuarial group to select speakers and topics and to decide how many events they run in a sessional year.

Most groups hold their events in committee members' offices or in the offices of key actuarial employers in the area.

Many groups run their events in the evening, after work, but again this is completely up to the committee and what works best for the group's membership.

Usually a member of the committee is nominated to take the bookings for the event, and to be the main point of contact for all arrangements.

If attending an event can count towards attendees CPD, it is common practice to provide a sign-in sheet to verify their attendance. Someone from the committee should be selected to keep a copy of all of these sheets for future CPD verification purposes.

Full details of the IFoA's CPD Scheme can be found here.

Responsibilities of a host

When someone agrees to host an event within their offices there are a number of actions that they should think about.

Session timings and event duration?

For example,

17.00 to 17.30 Registration and refreshments,

17.30 Start

18.30 Close

If this was a technical session it might attract one hour CPD credit for members.

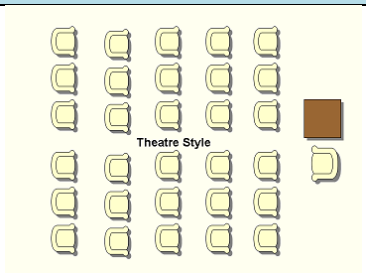
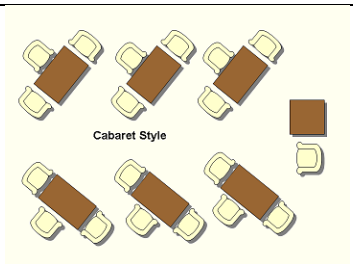
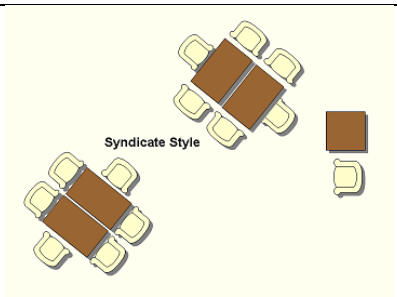
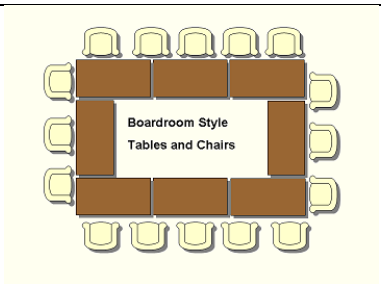
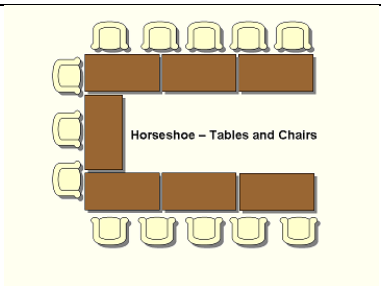
What sort of layout is needed for the room and how many people are expected to attend?

There may be a maximum number of people the room can hold. Always check health and safety and fire regulations first. Room layout options include theatre, syndicate or cabaret style to name but three options.

If the event is mainly a presentation with a Q&A at the end then theatre style is good. If there is going to be audience interaction and discussion between the delegates and they may want to take notes, then syndicate or cabaret style works well.

Also think about the size of the room and the numbers that might attend. If it is a large room but the numbers attending aren't expected to fill it, then having the room set-up syndicate or horseshoe style will help to make a room look full and busy. Better to have this than a room looking half full!

Room layout suggestions

Room layout		Most appropriate meeting style
Theatre		Presentation
Cabaret		A presentation where people may need to take notes.
Syndicate		An event where the attendees need to discuss topics and share views and may want to take notes, but no visual presentation.
Boardroom		Events where there will perhaps be an active discussion or debate, but no visual presentation.
Horse-shoe		As with Boardroom but there may be a presentation.

Will the speaker need any equipment?

- What equipment does the speaker need?
- If the speaker is giving a presentation do they need a laptop or will they bring their own?
- Will they need projection facilities?
- Might they need a lectern or a microphone? These are not usually needed for smaller sessions but for larger ones they may be useful.
- Will the session need flip charts and pens, paper and pens on the tables? It is always good to find out this kind of thing in advance as it avoids stress on the day.

What registration requirements are there?

Most sessions will need to have a sign-in sheet to allow proof of attendance for CPD audit purposes. Having a table outside the room for this is a great idea. If there are refreshments provided, have the sign-in table near these but not too close to avoid congestion. It is also a good idea to have someone looking after registration as people often have questions, and sometimes people turn up without booking to attend.

Who is going to manage the bookings for the event?

Often the person providing the venue looks after the bookings or arranges for a colleague in their company to do this and provides an email address for people register. If the regional group has a Talks Convenor they may take the bookings or sometimes it is the Secretary who looks after this side of the event organisation. Whoever is allocated to manage the bookings will also be the person to manage numbers as the room may have a maximum capacity and health and safety requirements must always be adhered to. *Please see the bookings template and also the sign-in sheet template*.

After the event it is very helpful if this person could send a scanned copy of the original sign-in sheet to the Regions Manager as well as keeping a copy for future verification of CPD in the event of an audit.

Health and safety and accessibility.

It is always a good idea to find out what health and safety procedures the office has. Is there due to be a fire test during the time of the session, or any other kind of disruption? Also, find out where the toilets and evacuation routes are. It is a good idea to have this information to hand for the Chair of the meeting and to remind them to cover this at the beginning of the session.

Is the room accessible for someone in a wheel chair? Are their accessible facilities for disabled attendees? It is important to consider the requirements for all attendees.

Responsibilities of a speaker

Speakers at events also have a number of things that they need to think about:

- How long should they talk for? Some groups like to have time for a question and answers session after the presentation.
- What style of presentation is best for the planned audience?
- How many people will be there? The speaker may wish to adapt their talk depending on the numbers attending.
- What IT equipment will the speaker need? Do they need to ask for a projector or screen?
- If they are sending their presentation in advance, who should they send it to?
- Who should they ask for when they arrive at the venue?
- Travelling time and the location of the venue? Do they know where they are going and what time they need to be there for?

The role of the Chair at an event

At each event one member of the regional actuarial group or society committee should act as the Chair for the event. This may always be the President or Chair of the group, or the members of the committee may take it in turns to take this role. It may be the person who is providing the venue that acts as Chair.

It is the Chair's role to welcome the speaker and to deliver the welcome to the attendees, including any health and safety notices, and to introduce the speaker. They will also usually thank the speaker at the end of the event and close the meeting.

What to do on the day

There are always some last minute activities that need to be done just prior to an event taking place:

- Make sure that all committee members who are attending arrive in good time to help with set-up and welcoming of attendees.
- Check with the host that the room is all set up and ready for the event. Make sure that any refreshments are available when planned.
- Print off a copy of the sign-in sheet and have this ready for people arriving. Set this up on the registration table.
- The Chair for the event should greet the speaker when they arrive and introduce them to any committee members who are there. The host should assist the speaker with any IT queries they may have.

- Check if there any health and safety issues such as fire alarms scheduled during the event and if there is one the Chair should advise the audience during the welcome speech. They should also advise fire evacuation routes and procedures.

What to do after the event

After the event there are some final tasks to be done:

- On behalf of the group's committee, drop a quick thank you email to the speaker and to the person who provided the venue.
- If it has been a CPD event, make sure someone keeps a copy of the sign-in sheet for future reference and verification of CPD, and then also send a copy of the sign-in sheet to the Regions Manager.
- If there is a copy of the presentation, send it to the Regions Manager who will upload it to the society's webpage for future reference and for people who could not attend the event.
- Start planning the next event!

Branding your event

Knowledge Sharing Sessions

Branding your events can give them a stronger sense of identity and in the long run will help people to recognise your events as event of value and quality. We have developed a logo to help you brand your event and this is available for you to use should you wish to. If you would like a copy of the logo please contact the Regions Manager.

7. A regional actuarial group action plan

Some regional actuarial groups produce an annual Action Plan. Whilst the production of Plans is not essential they are highly useful in helping the committee to plan an engaging and effective programme of events and for the Regions Manager to ensure the support provided to the regional actuarial group is as effective and appropriate as possible.

An Action Plan template is available for any group that would like to use it and it can be found in the appendices to this report.

8. Succession planning

An enthusiastic and effective committee is essential to the on-going success of a regional actuarial group.

Be aware of how fellow committee members are feeling, are they happy in their committee role? If they are not happy in their role try to find out why not? Would they like a different role or more support?

If there is a committee member who is about to step down plan ahead for replacing them, and perhaps ask them if they know someone who would like to join the committee in their place.

Volunteer vacancies

We can support you with this too. Our Volunteer Vacancies section of our website allows you to advertise for someone to take on a committee role. By setting out what is involved, the approximate time commitment, and the ideal type of person you would like to come forward and volunteer this makes the process open and transparent and fair, and can be a big help to you too. If you would like to discuss this or use this facility to recruit a new committee member please contact Debbie Atkins or Tess Joyce.

9. Using the IFoA online audio and video archive and the Professional Skills Training online materials.

The IFoA has an excellent range of online materials available for members to use, allowing them to work towards their necessary CPD and Professional Skills Training requirements.

This resource is also an excellent tool to allow regional actuarial group committees to run events for their members.

There is a wide range of video and audio recordings available, with new content being added regularly. Regional actuarial group committees can use this content and run events even when it is not possible to arrange a speaker. These events are run in the same way as speaker events, however access to the internet is needed and use of a large screen to view the content is recommended.

It is worth remembering to get everyone to sign an attendance sheet and then they can claim CPD hours where appropriate.

As well as technical sessions such as the Sessional Research Meetings and the OCF (Our Changing Future) events, there are also video recordings of the President's Address, and the Spring and Autumn Lectures.

Audio and video archive 2013.

Audio and video archive 2014.

Accessing the online content is also an excellent way of getting Professional Skills for Experienced Members CPD which all members of the IFoA who fall within Stage 3 of the IFoA's mandatory Professional Skills Training are required to undertake.

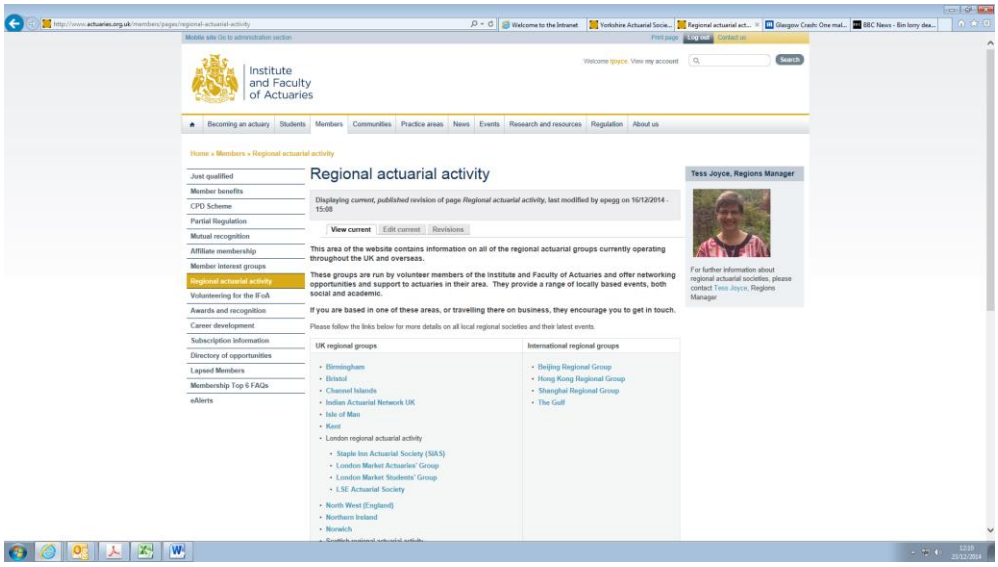
Professional Skills for Experienced Members.

10. Regional actuarial activity webpages within the IFoA website

Each regional actuarial group has a dedicated webpage within the IFoA's website. These can be found under the Members section of the website, and then in the Regional Actuarial Activity area.

These pages are updated, as and when required, by the Regions Manager.

These pages include details of the regional actuarial group, who the committee are, details of the events the group are holding and links to other pages people viewing the page may find useful.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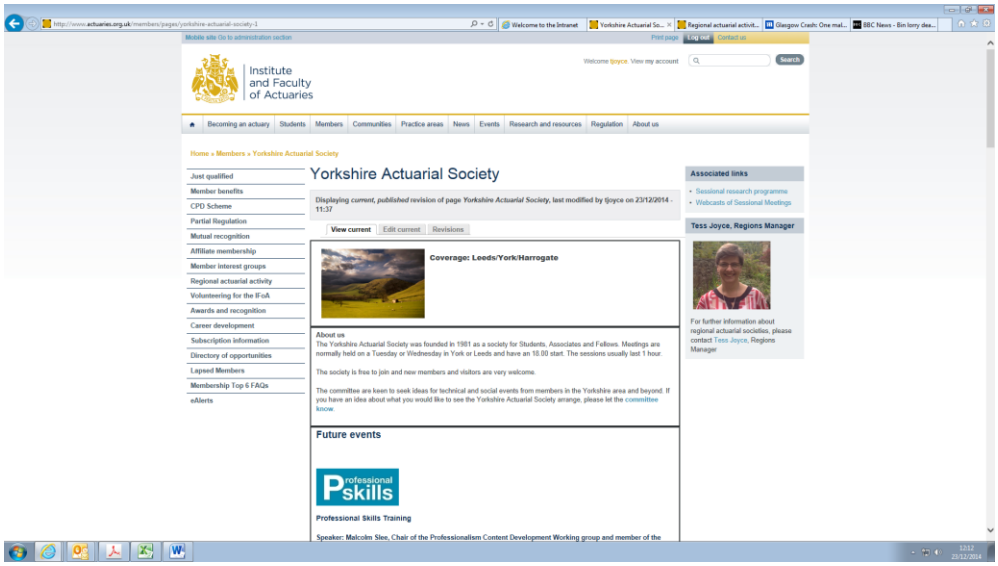
Regional actuarial activity
Tess Joyce, Regions Manager
UK regional groups
International regional groups


Institute and Faculty of Actuaries
Yorkshire Actuarial Society
Associated links
Tess Joyce, Regions Manager
Coverage: Leeds/York/Harrogate
Future events
Professional Skills Training


Institute and Faculty of Actuaries
Birmingham Actuarial Society
Associated links
Tess Joyce, Regions Manager
Coverage: Midlands area
About us
Local events

When a new regional actuarial group is established, one of the first steps will be to get a new page set up on the IFoA's website.

This webpage will:

- Provide a hub for information about the group
- Be an area members of the group can go for information on events
- Be an area people who want to find out about the group can go
- Provide details of the committee members and how to contact them
- Provide information on forthcoming events and how to book to attend
- Provide links to others areas of interest for visitors to the page

To set up a new webpage, please complete the template in the appendices and send to the Regions Manager.

Please also include photographs of the main committee members or people involved as it is excellent to have these on the site and allows new visitors to a regional actuarial group event to look for a friendly face.

If you need help completing this template, please contact the Regions Manager.

11. The regional actuarial group newsletter and the regional actuarial group workshops

A new regional actuarial group newsletter which was issued to all regional group committee members, including international committee members, was launched in November 2014.

Feedback on this concept from the 2014 Regional Society Committee Survey has been very positive with 75% of the respondents indicating they would read this and the remaining 25% reserving judgement until they see it. No-one felt it was something they wouldn't read.

The main topics that the committees would like to see in the newsletter include:

1. A summary of the regional society events happening for the next three months (90%).
2. Reviews of good speakers/events (90%).
3. A section for questions from fellow regional committee members who are looking for support/help/tips from other regional societies (69%).

It is also planned to hold regular regional actuarial group committee workshops, bringing committee members together to share their views and experiences and to discuss areas of joint interest.

If possible the plan is to bring international committee members into this activity, even if it is only for a short video conference call during the event.

The first of these workshops is planned for the end of February 2015.

12. The Volunteer Induction Pack (VIP)

The IFoA Volunteer Induction Pack (VIP) brings together, for the first time, all the material which supports everyone involved in activities for the IFoA as volunteers and PDR supporters plus some additional tips and hints for best practice including "Chairing Meetings". It is a first step which will evolve over time. We encourage you to view it and let us know if it is helpful to you.

The Volunteer Induction Pack can be viewed here.

There is also an introductory booklet, highlighting key features from the VIP.

If you would like to find out more, please contact Debbie Atkins, Head of Volunteer Engagement.

13. Appendices

13.1 Event sign-in sheet template

Use the template below as your sign-in sheet for your events.

Pre-populate the names and companies for your delegates. Before the event print a copy off and then get the delegates to sign the sheet on arrival. This means you have a record of attendance for CPD verification purposes.

After the event, make sure someone keeps a copy of this sheet for future reference and verification of CPD and also email a copy to the Regions Manager.

You may also want to email a copy to the delegates that attended so that they can keep a copy to verify their own CPD records.

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Put your Regional Actuarial Group logo or name here.

Put the name of the event here.

Put the date and the venue details here.

NAME	COMPANY	SIGNATURE
A		
B		
C		
D		
E		
F		

G		
H		
I		
J		
K		
L		
M		
N		
O		
P		
Q		
R		
S		
T		
V		
W		
X		
Y		

Z		

Institute and Faculty of Actuaries

13.2 Regional Actuarial Group webpage template

When a new Regional Actuarial Group is established it is important to have a webpage set up on the IFoA's website.

Name of the new Regional Actuarial Group i.e. Luxembourg Actuarial Group:

If your society has a logo please attach a copy and send to the Regions Manger

Description of the new Regional Actuarial Group e.g. why it is being set up, where it mainly meets, practice areas it covers…(max 200 words):

Committee members (please include at least one person here):			
Role e.g. President	Name	Contact email	Biography

Please also include a photograph of each person, in landscape if possible and in high resolution.

Forthcoming events:					
Date	Title	Location	Timings	Booking contact (email)	Description (max 100 words)

Other important links if applicable:	
Website	
LinkedIn Group	
Twitter address	
Facebook address	

13.3 Regional Actuarial Group Action Plan

XXXXXXX Regional Actuarial Group Action Plan 2015/16

Main objectives that we want to achieve this year.
Description what your regional group want to achieve this year. i.e. 6 technical events and 2 social events and get 20 new members. Put as much details as you can.

Event schedule				
Activity	Proposed action/s to be taken	Resources required	Target date for action	Desired outcome
i.e. Plan a technical event	*Set up a group to arrange*			
i.e.Have an annual dinner				

Forthcoming events:					
Date	Title	Location	Timings	Booking contact (email)	Description (max 100 words)

To follow…

Access to the speaker database