



## CPD Co-ordinators' Briefing 2019

07 November: Staple Inn Hall, Holborn, London, WC1V 7PP

### "Lifelong Learning – *providing continuous development for our members*"

**Welcome:** John Taylor FFA – President, Institute and Faculty of Actuaries (IFoA)

**Timing:** Registration, lunch, and surgeries from 12 noon – 12.30 GMT  
Briefing will commence at 12.30 GMT, concluding by 16.00 GMT  
*Surgeries will be available during registration and both refreshment breaks*

#### The agenda will include:

**Welcome – John Taylor, President, IFoA**

**Scene setting for the day – Debbie Atkins, Head of Engagement**

#### **Professional Skills Training update:** *introducing the new material for 2019/2020*

- What's new? How and when it can be accessed: including the PST Training Toolkit
- What's new? Refresh of Professional Skills Stages I and II: new courses to be implemented mid 2020
- Discuss innovative ways of using the material
- Solutions to FAQs.

**Facilitated discussion:** As part of this session, there will be facilitated discussions at tables: this session will allow delegates to share your experience of running a PST CPD session in your organisation: highlighting what has worked best; noting any issues and how you overcame them; identifying differences between different organisations. From this, we will collate ideas and create a resource for Members to enable CPD Co-ordinators to benefit and learn from each other.

**REFRESHMENT BREAK – opportunity to network with other delegates and to visit the surgeries**

#### **Member guidance about CPD:** *update, specifically highlighting information re:*

- Career breaks
- CPD for Senior Managers, Non-Executive Directors and Trustees
- Evidencing your CPD
- Plans for 2020/2021 review of the CPD Scheme.

#### **World Café facilitated discussion session:** *feedback and sharing best practice*

- Each table will cover one of the six facilitated discussion topics (see Appendix 1)
- The discussions will be introduced to all; and led by a facilitator
- Delegates pick the discussion they most wish to join
- Delegates will be encouraged to move on and join at least one other discussion at any time
- During discussions, delegates will be invited to share feedback in a number of different ways: speaking up within the group discussion; adding post-it notes to the flipchart; writing suggestions on the paper tablecloths at each table
- At the end of the session the facilitator will gather in all the feedback and will share, with everyone, one key observation which emerged from the discussions
- After the session, all the ideas, suggestions and observations will be collated and we will create a feedback report which will be shared. This will allow all CPD Co-ordinators to benefit and learn from each other.

The agenda will include:	
	<b>REFRESHMENT BREAK</b> – <i>opportunity to network with other delegates and to visit the surgeries</i>
	<b>The Lifelong Learning Board:</b> <i>strategic direction and adapting to your professional needs</i> <ul style="list-style-type: none"> <li>• <b>Dr Helen Wright, (Lay) Chair of the IFoA Lifelong Learning Board</b> will share the purpose and activities of this new IFoA strategic board (established in November 2018). This presentation will include an overview of the work of the Task and Finish Groups which steer IFoA strategic developments in conferences and events, pre- and post-qualifications, and Lifelong Learning.</li> </ul>
	<b>Closing Remarks – Professor Clifford Friend</b> , Director of Engagement and Learning, IFoA

**Surgeries:** We offer delegates the opportunity to visit a surgery on the day. If you are unable to attend, or would prefer to submit your question by email, you can do so by sending your question to [Debbie Atkins](#). Surgeries will be open at the start of the afternoon and in the refreshment breaks. They will cover:

- CPD and Practising Certificates
- CPD requirements for IFoA CAA members
- PPD and questions from Student Employer Contacts
- The Knowledge Hub
- Actuaries' Code, Monitoring Project, and Quality Assurance Scheme.

To help us tailor the session to meet your needs, could delegates please complete the following:

[SurveyMonkey link](#)

### Sharing your feedback

We encourage all CPD Co-ordinators to share their feedback, and to seek feedback from colleagues on any, and all, of the discussion topics (see Appendix 1). If you are attending the CPD Co-ordinators' Briefing on 7 November, please bring that feedback to the event. If you are unable to attend the event please submit your organisation's feedback and questions, in advance, to [Debbie Atkins](#).

We will collate all responses and this will be shared with all CPD Co-ordinators during December. The sessions will be filmed and the videos will be made available during December.

**Debbie Atkins**  
Head of Engagement

**September 2019**



## The six discussion topics:

### 1. Lifelong Learning: *the future of your learning*

This facilitated discussion will be an opportunity for you to tell us how you, and your colleagues, would like to see the future of learning, for members of the IFoA, take shape?

In particular, we are keen to hear your feedback on the following two questions in relation to all aspects of learning (pre and post qualification):

- What are the key directions you would like to see lifelong learning take in the future?
- What are the key objectives you would like the IFoA to prioritise?

**Please note:** during October the IFoA's 400 Club will be carrying out a survey to obtain members' feedback about Lifelong Learning - *continuous development*. If you, or a colleague, would like to take part in this survey please contact [Debbie Atkins](#).

### 2. Lifelong Learning: *the delivery of our conferences and events*

In seeking to deliver excellence for our members, around the globe, we want to ensure our conferences and events are valued by you and your colleagues and that we are responding to the ever evolving needs.

In this facilitated discussion we are keen to hear:

- What you like best about our current offering, what do you value most, or what could we do better?

Please also tell us how best we can support you in your learning? For example, do you prefer our live and interactive webinars, face to face one day events, residential conferences, or evening events? Or do you prefer to watch the events online on catch-up at a time that suits you best? Help us understand what members value most or what you feel is missing, so we can do more to move towards this in the future.

### 3. The CPD Scheme Review

Each year, the Scheme is reviewed by the IFoA Regulation Board. It is envisaged that there may be a wider review of the Scheme on the horizon than in more recent years. The last time the Scheme had a full review was 2014.

In this facilitated discussion we would welcome CPD Co-ordinators' views on what they think works well within their organisations, whether they are following the hours based scheme or the outcomes focused pilot.

- Views are sought on hours based v outcomes focused CPD
- Views are sought on recording requirements.

#### 4. **Policy and Public Affairs discussion: *why and how does the IFoA engage with legislators and regulators?***

A session on why and how the IFoA enters policy debates, and where you can find resources detailing the IFoA's views on the latest legislative and regulatory developments for use with your clients and employers, or perhaps even to run a CPD session.

The IFoA promotes the value of the actuarial skillset and profession to governments, regulators, business, think tanks and the media. We do this by using our members' expertise to address some of the most pressing policy challenges of our time, for example the ageing population and climate change.

You can view the details via the following link: <https://www.actuaries.org.uk/news-and-insights/public-affairs-and-policy>

In this session, we would like to hear your thoughts about:

- Are you and your colleagues aware that the IFoA produces the following outputs?
  - Consultation response
  - Policy briefings
  - Thought leadership campaigns
- Do you use, or have you thought about using, these outputs to support the information you provide to your clients and stakeholders?
- Do, or would, you use these materials to inform internal CPD sessions?
- What else can we provide to help you make this more accessible and therefore of value?
  - Are the topics relevant?
  - Is their publication timely?
  - Do you read the Public Affairs bimonthly newsletters?

#### 5. **Getting the most from the IFoA's Actuarial Research Centre (ARC) research**

The ARC is the IFoA's main vehicle for commissioning research on behalf of our members. It delivers industry relevant, cutting-edge research programmes that address some of the significant challenges in actuarial science, through a partnership of the actuarial profession, the academic community and industry.

We are keen to ensure our commissioned research focusses on the topics which are of most importance to our members, and the organisations where they work. From a CPD Co-ordinators' perspective, it would be very helpful to understand how you and your organisation currently engage with ARC research and what you'd like to see from it going forward.

For example:

- Have you, and your organisation, made use of [the ARC programme of webinars?](#)
- What type of topics would your organisation like the IFoA to commission research in?
- What do you, and your colleagues, want to learn about in terms of actuarial science, where the outputs could be used for CPD purposes?
- How you and your colleagues want to learn about ARC research – e.g. through VLE, webinars (viewing as a group or individuals), attending workshops?
- Would your organisation consider co-sponsoring a research project, and if so in which subject?

This facilitated discussion will be led by a member of the Research team.

We welcome this feedback from all CPD Co-ordinators, whether attending the Briefing or not.

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**6. How CPD Co-ordinators can facilitate or encourage CPD learning within their firm: *sharing experiences, differences, obstacles, best practice and learnings.***

All CPD Co-ordinators are invited to share their experience of running a CPD session in their own firm:

- We are keen to understand what each of you feel has worked best; and identifying if there are differences in the approach between different organisations and involving different audiences (e.g. small firms, larger firms, multi-site firms, involving home workers and contractors); how did you overcome any barriers that get in the way?
- Which topics have been the most popular in the last year for both CPD and PST within your organisation?

From this feedback, we would like to create a guide sharing best practice and enabling CPD Co-ordinators to benefit from this information and learn from each other.

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