



Institute  
and Faculty  
of Actuaries

# Sustainable Development Goals

## Workshop guide



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# Workshop guide: Sustainable Development Goals

Thank you for running a workshop on the UN's 17 Sustainable Development Goals (SDGs or Goals) to help us understand how the actuarial profession can contribute to the goals being met.

Here is a 'made easy' guide to running a workshop, though feel free to adapt it so that it works for your audience. Please capture and send us the outputs from your workshop. They will then form part of the evidence base we will use to inform both our internal and external policy and debates. We will also leverage the ideas to further promote the goals among actuaries and the employers of actuarial services.

## 1. Introduce the workshop

Set out the agenda and objectives for the workshop, for example:

Agenda (this is based on a 90-minute workshop, the timings are only a guide and you should adjust to your needs/attendees):

- i. Rearrange your attendees into tables, groups or themes, as appropriate, and explain how the ideas are going to be captured (5 min)
- ii. Provide an overview of the Sustainable Development Goals (5 min)
- iii. Discuss the relevance of actuaries in achieving the goals (30 mins+)
- iv. Share examples where the work of actuaries is already contributing towards the goals (15 mins)
- v. Consider ways that actuaries and the organisations they work in could increase the actuarial profession's contribution to the achievement of the goals (15 mins)
- vi. Consider what barriers and regulations may be hindering the achievement of the goals (10 mins)
- vii. Who do we need to influence to give the SDGs greater prominence within the actuarial profession and what could we do to influence them? (10 mins)

Depending on how many people you have in attendance, you may want to swap people between groups for different agenda items. You may also want to work through some agenda items as a whole group and others in smaller groups.

Objectives:

- Identify any good practice that you are already aware of within the organisations that actuaries work in
- Identify examples where actuaries are already contributing to the goals
- Generate ideas for how actuaries and the organisations they work for can play a greater role in achieving the goals.

## 2. Overview of the Sustainable Development Goals

There are many online resources to help you do this. A particularly good video is *We the People* (available on YouTube). Here is a link to the UN's website:

<https://sustainabledevelopment.un.org/>

## 3. Discuss the relevance of actuaries in achieving the goals

The IFoA has compiled a number of useful resources to show how organisations, businesses and academics are engaging with the goals and to demonstrate their relevance to actuaries:

<http://bit.ly/Resourcesforactuaries>

We have also developed some case studies to demonstrate how our members are already contributing towards the goals:

<https://www.actuaries.org.uk/sustainable-development-goals>

Given the breadth of the goals we have outlined two suggestions as to how you could approach this section of the workshop, though you should not feel restricted to these options:

- A. Start with the goals and seek to answer the overarching question – ‘Which of the 17 goals do you think the actuarial profession could play an active role in helping to deliver?’ Here are some considerations that may help you to answer this question:
  - Consider grouping the goals by the level of impact actuaries might have (e.g. high, medium and low)
  - Try to think of specific roles that utilise actuaries’ skills and knowledge

- What is the role of (life or non-life) insurance companies / pensions funds / investment consultants / risk management professionals (use or add to as appropriate for your attendees) in meeting the goals?

Again, larger workshops could split up into groups to focus on different goals or considerations.

- B. As an alternative approach it may be helpful to focus on **KPMG's framework for the finance industry** and lead discussions around the following:
- i. Access: Improving access to financial services
  - ii. Risk: Leveraging risk expertise to directly influence customer and investor behaviour
  - iii. Investment
  - iv. Cross-cutting issues including fiduciary duty, partnerships and corporate responsibility.

The conversation can then focus on the skills and expertise actuaries could contribute and the roles they can play, possibly within multi-disciplinary teams.

Larger workshops could be split into four groups to focus on one part each, while smaller workshops may prefer to focus on just one or two.

#### **4. Share examples where the work of actuaries is already contributing towards the goals**

You may find the case studies on the IFoA's website useful for initiating this discussion. If you capture any further examples it would be very helpful if you could share them with us, as we are seeking to develop further case studies. (If the case studies relate to any of your workshop attendees please pass their contact information on to us.)

#### **5. Consider ways that actuaries and the organisations they work in could increase the actuarial profession's contribution to the achievement of the goals**

Select a goal that has been identified as being particularly relevant and ask participants how they might incorporate this into their work (e.g. investment strategy, corporate strategy, product development, tools / methodologies) and what impact this could have (e.g. change investment principles, employment practices, greater innovation).

Consider whether these actions would impact on any of the other goals (the aim is to consider the interconnectivity of the goals).

If you have time repeat this exercise, this time choosing one of the goals where participants think actuaries are less likely to be able to contribute towards it being met.

## **6. Consider what barriers and regulations may be hindering the achievement of the goals**

Consider whether current business practices / regulatory frameworks are hindering the achievement of the goals.

## **7. Who do we need to influence to give the SDGs greater prominence within the actuarial profession and what could we do to influence them?**

We suggest that you break this question down into two parts:

- i. identifying the stakeholders; and
- ii. identifying the best way to reach them and inform their thinking.

# Handy hints and tips for organising workshops

If this is the first time you have organised a workshop, no problem!

We normally find that a good level of attendance can be achieved with six weeks notice. Before contacting attendees, secure a location and time so that these can be included in the invitation.

Send useful material to participants, along with a reminder around one week ahead of the workshop. This should include:

- an agenda (feel free to share parts of or all of this guide)
- a link to the material on our website and the KPMG report if you plan to refer to them and would like attendees to have familiarised themselves with the content in advance
- identify one or two people who you can brief beforehand to help keep the discussion flowing and potentially one or two volunteers to capture the discussion.

Other useful materials you may wish to prepare for the workshop include:

- a card for each goal as these can add a visual dimension to help stimulate discussion. You can download the files to do this here:  
**<http://www.un.org/sustainabledevelopment/news/communications-material/>**
- notetaking materials, including pens and paper for volunteers
- flip charts and pens for facilitating the group discussion and feedback
- tables and chairs that you can rearrange according to numbers and your preferred format for the workshop.

And finally, you may want to consider offering refreshments to entice people to come along!

Once you've held your workshop please let us know how it went and, if possible, send us a photo or two of the workshop in action as well as any notes of the discussion. Please send these to **[policy@actuaries.org.uk](mailto:policy@actuaries.org.uk)**. You can also contact us via this email address if you have any questions while planning your workshop.



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