

## **Note on Reflective Practice Discussions**

Reflective Practice is a mandatory part of the IFoA's CPD scheme. Thus, all members of the Society who are also members of the IFoA are required to do it.

The Society also believes that it can be useful as part of a member's CPD and recommends that members consider doing it.

### **IFoA's Approach**

The IFoA defines it as

*A discussion to allow the Member to reflect on the CPD Activities carried out during the previous CPD Period, Learning Outcomes achieved and how they have applied what was learnt; as well as to discuss how they intend to approach future development and learning, including anticipated other work and/or roles.*

Some important points should be noticed

- It is not reflecting to yourself; it is a discussion with another person.
- It is primarily a reflection on what has been done and the associated learning outcome and is therefore in arrears of the doing of the 15 hours of CPD activities each year required by the UK scheme.
- It should also look forward to what the member intends to do.
- It has to be with somebody "who understands the nature of your work and your career development needs".

It should also be noted that, as part of the IFoA scheme, there will be a selection of a small percentage of members to have Reflective Practice discussions with the IFoA executive. If you are selected, this is mandatory. It is worth noting that this process may identify problems in the CPD of those selected and that remedies may be suggested. If the member does not address problems identified, then disciplinary action is possible.

The IFoA provides resources in the form of a couple of (amusing) videos, a brochure about the subject and a brochure concerning how they intend to do the discussions between members and the IFoA executive. These can all be found here: -

<https://www.actuaries.org.uk/learn-and-develop/continuing-professional-development-cpd/reflective-practice-discussions>

There is also a pool of volunteers who are prepared offer the role of the counterpart but this is only for IFoA members. The Actuarial Livery Company offers a similar pool, again only for livery company members.

### **The Society's Approach**

When the current CPD system<sup>1</sup> was being developed, members were surveyed about reflective practice. The results showed a marked difference in views. Many responses were positive but many were sharply negative.

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<sup>1</sup> Applying from 1<sup>st</sup> September 2021

The working group developing the CPD system felt that there may be some instances in which members would not profit from this practice. Examples might be somebody already engaged in a multi-year program of learning or somebody planning to retire very soon.

Therefore, the working group decided to recommend to Council that it should not be mandatory and this is the situation that applies to Society members.

Nevertheless, just because it might not be useful for everybody all of the time, does not mean that it might not be useful for some people, some of the time. Members are therefore encouraged to consider if they would find it useful and if in doubt give it a go (IFoA members have no choice anyway).

To repeat it is **optional**, therefore you have complete freedom about what you do and how you do it. Obviously that freedom is constrained if you need this (by virtue of IFoA membership) to also count for the IFoA scheme.

### **How to do it?**

The suggestions below might help you in your own reflective practice, but you should temper what you do to your own situation.

### **Who?**

The first matter you have to decide is who to have the discussion with (your “mirror”). For many people the logical person would be their boss. They might be well placed to tell you your training needs and might also have budget to spend on them. However, if your boss is not an actuary or if your own career plan requires you to learn in order to move job, that might not be ideal.

It is also worth considering that it is vital to be aware of what is going on outside your own company and that groupthink is a major risk. At least some of your CPD should be making you aware of what is happening in the wider world.

Colleagues from the same company or fellow actuary friends might give a very different angle to what you might get from your boss. You might very well consider a mutual reflective session - you do theirs and they do yours. There is no reason why this mutual session should be confined to being just two people.

If you chose somebody outside your own area of practice, they will probably give you a different perspective which can be useful. If you are in specialist role then your skills and knowledge should reflect that, but if you are in a generalist role then perhaps you need wider skills and knowledge.

We would suggest that it is probably beneficial to carry out the reflection with different types of people (e.g. boss, colleague, actuary, non-actuary) in different years rather than always with the same person.

### **Location**

It is probably best for you to have this separately from any performance appraisal. Sometimes appraisals can be difficult discussions and the word reflection itself suggests that the process should be undertaken calmly. Find a time and a place that encourages constructive discussion. For this reason, many companies have a separate process for career development conversations and this could be the best occasion to have reflective discussions. However, you should be aware that your professional development and your career with your company are not always going to be the same.

Ideally, the discussion should be planned sufficiently far ahead that you can set your own thoughts down on paper beforehand. Doing it all on the fly is unlikely to be successful.

### **Format**

This is of course, something to be agreed between you and your mirror. This is a suggestion of the stages you might go through.

#### Preparation

- ★ Write down your own situation, what is your current position, where do you want to go, where might you go?
- ★ What CPD did you do last period, what did you gain from this? How might you have gained more?
- ★ What thoughts have you for future CPD?

#### Meeting

- ★ Go over each of the above, ask for comments
- ★ Get suggestions for future CPD

#### After Meeting

- ★ Make a record of the meeting including who with when and where
- ★ Document key points
- ★ Check back with your mirror to make sure there is nothing important you have missed
- ★ Diary a date (3 or 6 months after) for you to check on progress against any plan made

It is probably a good idea to make notes that you can refer to later, at every stage and conversation; not least as this will enable you to check back that you are following through on your plans.

### **Other Ideas**

The Society's Competency Framework may prove useful in helping you to assess training needs.

It is very important to not assume that you are aware of everything that you don't know. There may be unknown unknowns, therefore it is beneficial to experience different types of CPD. You never know what you might learn.

Being a mirror for somebody else may be as useful as having your own reflective practice discussion.

### **Other Resources**

Apart from those on the IFoA website given above, there is a video on Actuvie called "Brandon does diffraction" produced by the South African Actuarial Association. Only the first part is relevant.

The IMI also stocks copies of a book on the subject "Reflective practice: writing and professional development" by Gillie Bolton. Copies can be borrowed as the Society has corporate membership.