Reflective Discussion Guideline

Contents

1. Purpose

The purpose of this paper is to set out the purpose and content of the Reflective Discussions, which is an assurance programme in support of the continued professional development (CPD) of the Actuarial Society of South Africa (The SOCIETY). What follows is pertinent to the SOCIETY, its members who will participate in the programme and the prospective coaches.

2. Background

The Outcomes- based continued professional development programme for Fellows and Associates of the SOCIETY was introduced in 2018 and has been received with enthusiasm. Technical members of more than ten (10) years are also required to comply with CPD. The Institute of Actuaries in the UK (the IFOA) has adopted a similar strategy. Both organisations are developing their processes and cooperating in this regard.

The CPD programme is based on the "professional promise" made by the SOCIETY's actuaries in their Code of Conduct. Actuaries thereby undertake to maintain their capability to deliver a quality service that is:

- Technically correct and up to date,
- Ethical[1], and
- Subject to professional oversight[2].

The Society strives to develop the knowledge, skills, expertise, and professional qualities of its members. It aims to inculcate life- long professional learning by placing the responsibility for ongoing development in the hands of the individual. The development could take place in the CPD's technical, normative and organisational strands. The professional development cycle is repetitive and is described as follows:

Fig. 1 The SOCIETY's Cycle of Professional Development

Within this cycle, actuaries are encouraged to think about their personal development needs regarding the current and future roles which they perform, or intend to perform in future, and their areas of work. They then plan appropriate development actions to address the needs, implement these actions, and then reflect on the

[1] 'Ethical' is an abbreviation for normative skills such as communication, modelling, strategic thinking, professionalism and other soft skills applied in practice.

[2] 'Professional oversight' here refers to the benefit and concept of a profession, i.e., all the members coming together to set standards and then abide by them.

extent to which the desired learning and development has taken place.

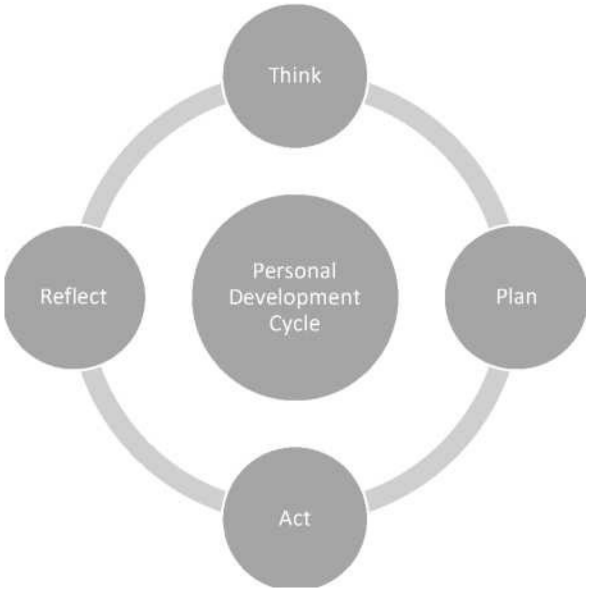

Fig.2 A Personal Development Cycle

The SOCIETY's Cycle of Professional Development (Figure 1.) embodies the "Diffraction Discussion" which is a confidential reflective discussion between the actuary and a "Diffraction Partner" who is chosen by the actuary. The term "diffraction" is borrowed from physics and is described as "the interaction of waves, in which two approaching peaks combine to make a bigger peak." The aim of the discussion is to enable self-reflection, on the one hand, and objective feedback from another professional, in order to determine to what extent the development actions are helping actuaries to meet their objectives.

3. Reflective Discussions

The SOCIETY implemented a pilot for Reflective Discussions in 2019 (before the Covid-19 lock-down) with a few members and extended this pilot in 2022. These reflective discussions are different to the diffraction discussion embedded in the outcomes based CPD requirements. The difference being that these discussions will be held between the actuary and an experienced business coach. This paper will use the term "Reflective Coaches" to describe the coaches who participate with the actuaries in these reflective discussions.

The aim of these discussions is:

a) To draw together the learnings and outcomes experienced by members following both the outcomes and hours based CPD programmes as this relates to professional development, development plans, diffraction or peer discussions, and participation in CPD activities and / or events. Participants can use this opportunity to gain insight into what has been learned with the reflective discussion aimed at building a platform that encourages participants to plan and think about their next phase of professional development.
b) For the Reflective Coaches to collate the experiences of a sample of participants in the CPD programme which will serve to:
    i. provide a channel of feedback from participants to the SOCIETY on the effectiveness of the CPD system, e.g., to what extent the SOCIETY is meeting its objectives to set guidance through requirements to foster member engagement in lifelong professional learning and fulfilling common development needs,
    ii. identify any trends or general threads that are observed which may highlight areas for improvement to the program,

iii. assess operational efficiency of the program, e.g., ease of administration, level of understanding by participants, alignment of the process with Employers' personal development practices, etc.

iv. comment on whether the program provides assurance to the public, statutory bodies, and the SOCIETY that effective CPD is taking place through this CPD model, as envisaged in our Professional Promise.

In preparing for these discussions, actuaries are encouraged to review their personal development cycles (see Figure 2) and seek to develop insights and plans which will enable further learning. Once again, the benefit to actuaries of these discussions will be determined by the effort put in, their willingness to be open and share, as well as their hunger to enable further development.

The contents of the discussions will be framed by, amongst others:

- The actuaries' wisdom, experiences, and insights
- Their insights and learning from the prior diffraction discussions if applicable
- Their perception on the extent to which other activities contribute to their professional development
- Their development needs and plans in the next personal development cycle
- To what extent their professional development is contributing to aspects like career development, personal development, decision making, problem solving, etc.

Reflective Coaches are expected to immerse themselves in the personal development cycles and experiences of the actuaries. They will aim to build trust, not to be judgmental and will guarantee confidentiality throughout the process. The coaches will use question frameworks to stimulate thinking and lean on the experiences of the actuaries to direct the discussions. Examples of possible questions to open conversations are listed in Annexure A below.

The SOCIETY is keen to receive feedback on actuaries' experiences of the CPD system and the reflective discussions. To enable this, issues and trends of a general nature will be fed back by coaches to the SOCIETY. The names of individuals who offered comments in this regard will not be divulged.

Actuaries who are sampled for CPD compliance monitoring will have the option to select a coach from a panel of approved coaches (subject to capacity per coach) or opt to have one of the coaches assigned to them. The SOCIETY will communicate to selected members the contact details of the respective coaches that they have requested or been assigned to, placing the onus on the actuaries to contact the coaches via email, WhatsApp, or a cell phone call, to set up a suitable date, time, and virtual platform mode to set-up an appointment with the coach. The SOCIETY will at the same time provide each of the Reflective Coaches with a list of members that they can expect to contact them. The discussions will be conducted virtually, they will ideally last for an hour but can be extended by another thirty minutes if needed. The engagement with the reflective coach will be funded by the SOCIETY. Sessions can be scheduled workdays between 07h00-18h00. A Member can contact the office to have a coach reassigned if the coach that they are paired with is known to the member and the member feels that the independence of the coach could be compromised for whatsoever reason.

The scope of this discussion will be specific to the individual's professional development needs within the context of the CPD programme. If actuaries wish to have follow-up discussions with their coaches, they are free to arrange this at their own cost. The coaching session is confidential and any feedback to ASSA will be provided on an anonymous basis and aggregated to retain confidentiality that is at the heart of coaching.

References

- Discussions with Micky Lowther
- Documents provided by the SOCIETY.
- Kent University, 2012, https://www.kent.ac.uk/learning/PDP-and-employability/pdp/reflective.html
- Klein, N. Time to Think, 1999, Endeavour House, London.

26/06/2023