



International Actuarial Association  
Association Actuarielle Internationale

Education Committee  
4 May 2023 – 08:00–09:00  
Q2 Virtual Meeting  
Minutes

*The attendance list is available at the end of these minutes.*

1. Introduction and welcome to the new members of the committee.

The chairperson, Henning Wergen, welcomed all the participants to the meeting.

2. Approval of the minutes from the December 8, 2022, meeting.

The minutes were approved without remarks.

**Action item:** Secretariat to post final version to the website.

3. Syllabus evaluation alternatives to the proposed worksheet.

The chairperson explained that since the last meeting the group working on the syllabus assessment tool received feedback about the tool itself and they wanted to take an opportunity to have a brief discussion on a potential way forward.

Wes did an overview of the work done to date and thanked committee members for the feedback received during the previous meeting. The feedback recognized that because of the large variety of education systems that our members have, it might be complicated to use the tool.

Wes explained that the intent is to continue using the excel work tool. This already contains the questions posed on the Education Questionnaire our member associations traditionally complete when making changes to their education system.

It is recognized that member associations are different and that they use different credentialing processes. Given this, the Secretariat looked into the different types of associations taking into considerations the groups that have their own credentialing process, the ones that rely in other associations and the ones that adopted the system of other member associations (derivative), and a large majority has been able to follow the process.

The group's position is to try to have the work tool as a starting point for everybody in their assessment, as it has everything laid out in a concise way, acknowledging that associations will need help answering some of the questions included or might need a significant amount of time collecting all information depending on their education system. The intent is asking associations to make a note of the areas where they are having problems answering, so there can be a conversation between the association and the reviewers of the committee to achieve an understanding of what is being done differently and/or the gaps and opportunities that might rise from the exercise.

It was emphasized that the assessment process will consider the work tool as a starting point for a conversation with member associations; it will also consider the assessment made by other umbrella associations such as the AAE; and it will consider making a distinction between associations that are looking for support from the IAA and those that have a long-standing tradition of reviewing and developing their own process education process. It was further noted that the review process will not take place on an annual basis.

A question regarding the approval of education systems was posed. It was noted that perhaps the word approval is not appropriate for the type of work undertaken. The intent is to have a conversation with the association and to ensure that they have within their education system what is needed for the delivery of a good education.

Regarding the frequency of the evaluations and the type of information associations will be required to submit. It was mentioned that information will continue to be sought on a yearly basis through the confirmation form. But it is proposed that instead of having a yes / no type of question, we ask associations to provide feedback about the action they have taken towards their syllabus over the past year. Currently if an association said that they had made changes, a full review would be requested. The new proposal would include options such as below with the following results:

Possible Question:

What of the following statements reflect the work your association made to its education system:

Possible action options:

- a) No changes were made - No need to review.
- b) We made substantial changes by removing some elements and adding others - Review required.
- c) Added elements - Reach out to the association asking for the elements that were added.

It was noted that new applicants will need to undergo the full review process.

The concern about the possibility of providing information with the level of detail required was reiterated. But it was also noted that having a conversation with the association and understanding what they do is a step forward to a process of assessing compliance. It was noted that the work tool should allow a respondent to select whether the association is a member in compliance with the AAE's syllabus.

Regarding the concern of associations not being able to provide the assessment by completing the work tool, it was noted that the issue will be addressed once the committee agrees on a way forward. It was further explained that the group addressed the question of having evaluation tools for different education paths but agreed that it is better having everyone use the same tool as a starting point, acknowledging that there will be associations posing very detailed questions. The intent is to establish a conversation between the reviewers and the association, which means that the reviewers will need to be better equipped to address the questions of the associations. This would become a consultative process instead of checking the box and looking for strict adherence.

Regarding the Blooms Taxonomy it was noted that this was included in the work tool from a self-evaluation perspective as it might be useful to have everything in one place and it might be more helpful than a 0 to 3 scale. Blooms is intended to be an optional resource that might be useful for associations, it is not a requirement.

Regarding the Elective Subject coverage sheet of the work tool, it was noted that this allows the respondent to add all additional elements they consider in their educational path.

It was noted that the explanations about the intent of the work tool clarified many of the concerns of some associations, nonetheless it is strongly recommended that this intent is explained on the work tool before asking associations to complete it. This is not currently expressed, and it would change the approach that the organization completing the tool will have. This will also help people completing the document who are not always the association's delegates to the Education Committee.

It was recognized that although there is a general agreement on the way forward, there are still some issues to iron out before the meeting in Sydney.

Committee members were asked to submit any comments they may have prior the Sydney meeting to Wes Griffiths, Henning Wergen or Karla Zuñiga so they can be properly addressed.

#### 4. Other Business

No other business

Please select [here](#) if you wish to view the video recording of the meeting.

Attendance List

Chairperson: Henning Wergen, Deutsche Aktuarvereinigung e. V. (DAV)

Co-Vice-Chairperson:

Wes Griffiths, Casualty Actuarial Society

Members:

Yair Babad, Israel Association of Actuaries

Mercè Claramunt Bielsa, Col·legi d'Actuaries de Catalunya

Christian Buchta, Aktuarvereinigung Österreichs (AVÖ)

Jean Claude De Pooter, Institut des Actuairens en Belgique

Yas Fujii, Japanese Society of Certified Pension Actuaries

Yosuke Fujisawa, Institute of Actuaries of Japan

Christian Furrer, Den Danske Aktuarforening

Wes Griffiths, Casualty Actuarial Society

Diego Hernandez Rangel, Colegio Nacional de Actuarios A.C

Sevtap Kestel, Actuarial Society of Turkey

Olivier Lopez, Institut des Actuairens

Jari Niittuinperä, Suomen Aktuaariyhdistys

Alison Rose, Canadian Institute of Actuaries

Joe Smith, Institute and Faculty of Actuaries

Péter Vékas, Magyar Aktuárius Tarsaság

Daniel Ye

Apologies:

Conrad Backeberg, Actuarial Society of South Africa

Malcolm Campbell, Svenska Aktuarieföreningen

IAA Secretariat:

Karla Zúñiga-Cortés, Administrator, Communications and Membership

Observers:

Al Beer, Casualty Actuarial Society

Clifford Friend, Institute and Faculty of Actuaries

Daniel Jung, Deutsche Aktuarvereinigung e.V. (DAV)

Harri Kuosmanen, Suomen Aktuaariyhdistys

Alicia Rollo, Canadian Institute of Actuaries

Onofre Simões, Instituto dos Actuários Portugueses

Ken Williams, Casualty Actuarial Society