

Growing your own

A members' guide to staff development and funding

BIBA Yorkshire and Northern Region



This document has been prepared by the BIBA Yorkshire and Northern Regional Committee in collaboration with CII to assist members with staff development and to indicate what funding may be available. It is not fully comprehensive but is intended to point you in the right direction and in particular draws on the practical experience of other members.

Page Contents

- 1. Working with schools**
 - a) Work experience students**
 - b) Recruiting school leavers**
- 2. Broker apprenticeships**
- 3. Distance learning**
- 4. Face-to-face training**
- 5. Undergraduate placements**
- 6. Talent Initiative (Graduates)**
- 7. Advanced training**
- 8. Developing tomorrow's leaders – coaching days**
- 9. Management and leadership courses**
 - a) Supervisors and junior management**
 - b) Business owners and senior managers**
- 10. Other training projects**

Growing Your Own A Members Guide to Developing Competent Staff and Funding Opportunities

Introduction

This document has been prepared by BIBA's Yorkshire and Northern Regional Committee for members in collaboration with the CII to address this subject. It is not fully comprehensive but is intended to point you in the right direction and in particular draws on the practical experience of other members.

If, as a result of the information obtained in this document you are successful in accessing further support for your training and staff development needs, or have any observations or case studies of your own, please let us know the details so that we can share the information with other interested parties. The document will appear on our website and your input will help us keep it up to date.

Be aware that the rules for and administration of the various government funding initiatives can change with little warning, so do check out that the information given in this guide still applies. We will endeavour to keep the information on the website up to date.

The need for Growing Your Own

The Industry as a whole is looking to improve professionalism and brokers also need to demonstrate staff competence to the FSA.

There is no doubt that brokers have to look to developing their own staff at all levels and this also has cost implications. Funding is available but it is not always clear how one goes about obtaining it.

The CII Broker Academy

BIBA and its members work very closely with CII to provide a programme of appropriate training for brokers and intermediaries. All Face-to-Face training and distance learning is provided by the Broker Academy, a part of CII's Faculty of Insurance Broking.

Note: Funding of training for graduates is limited and does not apply to Apprenticeships. Please check with the training provider before committing yourself.

Working with Schools

There have been significant changes in the organisation of careers information provided in schools. An outside agency Connexions provides advice and collaborates with staff at each school. More information at www.connexions-direct.com/

The CII and its local Institutes have tried various initiatives to provide information to schools to encourage interest generally in a career in insurance. Experience is that it takes a lot of time commitment to attend careers evenings and the like and the results are difficult to measure.

Discover Risk information

CII has just extended their Talent Initiative directed at university graduates to incorporate schools and colleges in the Discover Risk programme.

- Student-focused and adviser-focused leaflet – click [here](#) for the link to the pdfs
- Two websites
www.discoverrisk.co.uk for students and employers and
www.discoverrisk.co.uk/iag for the adviser community
- For an overview of the campaign objectives and some statistics - [click here](#)

A key takeout is that the campaign is different from the previous Talent Initiative in the following ways:

1. Employers of all sizes can feature on the site
2. The campaign targets school and college learners as well as undergraduates
3. The campaign targets careers advisers and teachers, as well as learners

Career related diplomas

Schools are starting to offer career related diplomas from September 2009, although it will take a few years before all schools have them in place. One of the career subjects is Business Administration and Finance and there are three levels. More information is available at-

yp.direct.gov.uk/diplomas/subjects/Business_Administration_Finance/index.cfm

You may want to get involved by acting as a mentor for students.

If you are a typical “community” broker, very positive benefit can be obtained by developing a relationship with one or more local schools. Not only do you get your name known but you can get positive guidance of good pupils from careers advisers.

Work experience placements

Schools are keen to provide work experience for their year 10 (15 year old) students. This is arranged directly through the careers officer at the school and is usually for a three week period. You are advised to ensure that you are prepared to spend time with the student and have a meaningful programme or they will be bored silly, will not come back to insurance and will tell their mates too! This works successfully with some brokers who end up offering the student a position when they do leave school.

Recruiting from schools

Recruiting from schools is much easier if you are offering a career with a structured training plan, preferably a Broking Apprenticeship.

A Member case study is available at [here](#)

Broker Apprenticeships – A secret no more

Broker apprenticeships have been around for a long while now but few know about them and have used them. The Government has been pushing apprenticeships generally in the last few years and more and more members are becoming interested. General insurance broking apprenticeships have now moved from the control of the Financial Services Skills Council to the National Apprenticeships Service but this has not changed the arrangements for delivery through the existing providers.

Apprenticeships are available on two levels:

- Level 2 for Business Administration (office only duties); and
- Level 3 for Insurance Apprenticeships.

For Level 3 you should be using a CII accredited provider as these schemes result in an insurance qualification enabling apprentices to move on to higher qualifications. Apprenticeships apply to all ages. Full funding is usually available for 16-18 year olds and there is significant funding for 19-24 year olds. Funding for 25 years plus is unlikely but you may be able to come to an arrangement with the provider. Funding also varies from provider to provider and according to the economic area you are in.

CII have published a general leaflet on Apprenticeships. This is available at www.biba.org.uk/PDFfiles/Apprenticeshipflyer09.pdf

Further information is also available at www.cii.co.uk/generalinsurance/apprenticeships/apprenticeship_about.aspx

Apprenticeship Providers in Yorkshire and Humber economic region

All these providers are CII accredited and are currently providing funded apprenticeship schemes to members in the area.

Provider	Contact name	Details
Park Lane College, Leeds	John Bean	0845 045 7275 or 07920 201914
Babington Business College	Ange Mosinski	01332 345450
Skills Solutions	Judith Furlong	07860 910139

See the case studies at [here](#)

Distance Learning

One of the easiest ways of teaching staff basic regulatory, technical and soft skills is through distance learning. It is normal for members to allow an hour or two per week to enable training to take place.

broker ASSESS is the system developed and backed by BIBA, CII and Axa. This comprehensive online training and competency tool has content designed and written for brokers by broking experts. It has simple administrative facilities enabling the training co-ordinator to check that training is being undertaken and monitoring targets and progress. It has recently had a major upgrade and is continually updated to provide the most current learning and assessment tools. Further information and a 14 day free trial can be obtained by calling Kirsty Wingrove at BIBA 020 7397 0224.

Fuller details appear at

www.brokerassess.co.uk/brandedsites/brokerassess/overview.asp

Face-to-face training

BIBA works with CII as part of the Broker Academy to provide training within the Regions on technical, managerial and soft skills subjects. The programme is established in September/October each year following meetings with Broker Academy and BIBA members. The cost of courses varies from £100 - £130. One-off training courses can also be arranged for single members or groups of members with the same requirements. For quotations for one-off courses, contact Ian Raper, your Regional Executive at raperi@biba.org.uk

The latest list of courses, course outlines and booking forms are available at:-

www.biba.org.uk/BrokerStaticPageDisplay.aspx?templatename=YorkshireNorthern/YorkshireNorthernYorkshire2010.htm

Placement Students as a recruitment solution

University Placement students can be a fantastic solution to creating ongoing recruitment solutions within a business or simply just to fill a gap for a year in the workforce for sabbaticals and maternity cover.

Advantages

- Flexible 1 year contracts.
- Competitive salaries compared with similar aged individuals
- The ability to mould an individual to your business culture
- A year long interview and a great grounding for staff to come back into the firm after graduation
- Bright, intelligent and switched on young people to add value to your workplace

For a case study see [here](#)

The CII's Talent Initiative

CII launched their Talent Initiative in 2006 to promote insurance as a career, targeted at the graduate market.

Caspar Bartington, CII's Relationship Manager - Further and Higher Education, regularly attends University and College Careers Fairs/Events and tries to take practitioners with him, especially relatively recent graduates. If you would like to attend a Fair/Event taking place at your local university, please speak to Caspar on 020 7417 4788 or email caspar.bartington@cii.co.uk

The Talent Initiative has now been re-launched as the Discover Risk initiative which now incorporates schools and colleges too. More information appears on page 4.

Graduate Internships

Internships are in the process of being developed. An article appears at: http://www.cii.co.uk/knowledge/financialsolutions/showpdf.php?fname=fs_2007_04_article_pfsallieswithukcaf.pdf.

Watch the CII website for further developments.

Advanced Training

CII and BIBA are seeking to raise the levels of professionalism and in particular the FSA will continue to seek evidence that people are competent at the level of work they are doing.

Advanced Diploma of the CII

For most in the insurance industry progression to this level should be a requirement for further development. For the apprentice their programme of training will probably have seen them guided through the Foundation and certificate awards. From here the credits gained in obtaining these qualifications can lead to the DipCII and ACII qualifications. For the Graduate trainee, reaching ACII will normally be a mandatory part of the training programme they undertake. Dependent on the type of degree undertaken there may be exemptions (extra credits) for certain subjects.

Further Professional Qualifications

Once obtained, these qualifications open up other opportunities for study and development dependant on the needs of the company and the individual. Increasingly brokers are promoting risk management and health and safety advice as part of their services. This may range from risk surveys (property and/or liability based) to more complex arrangement of Business Continuity Planning or drafting of Health & Safety policies and advice. In order for the individual to be taken seriously when undertaking these tasks, they will need additional qualifications such as those offered by the Institute of Risk Management and National Examination Board in Occupational Safety and Health (NEBOSH). Dependant on the size of the broker and the likely long term benefit, such additional study will be employer sponsored with additional study leave allowance.

Continuing Professional Development (CPD)

Attaining CII and the other higher professional qualifications needs to be taken seriously with individuals required to demonstrate an ongoing commitment to CPD. The CII offers numerous ways in which this can be achieved. One of the best options include the CII/BIBA sponsored Broker Academy courses. The broker ASSESS product automatically records time users spend on the system and will produce a report to that effect.

For the IRM and NEBOSH there is a slightly more focussed approach which entails the individual being involved in committees, exam marking, written articles and other criteria.

Higher Level Qualifications

Once sufficient CPD obtained, individuals can then consider options to complete the Fellowship of the CII or higher levels of qualification within NEBOSH or the IRM. Entry to the Fellowship of the CII is made easier having completed the IRM or NEBOSH exams as these would count towards the special achievement which is

part of the study requirements for the FCII along with sufficient CPD, completion of a business Ethics program and a statement of personal achievement.

These options for higher study are not exhaustive and for those who wish to focus on Insurance and management of people rather than risk management there opportunities for further degrees and higher degrees (MSc level) in Insurance and Management.

Developing Tomorrow's Leaders coaching days

Yorkshire and Northern Region of BIBA believes it is essential that young talent is developed both in a technical and competent way for the benefit of the member's business but also in personal development and confidence. It uses surpluses on other events to provide subsidies for these coaching days. These days will form a continuing part of the support for the Region's members.

Details of planned events are on our website at

www.biba.org.uk/BrokerStaticPageDisplay.aspx?templatename=YorkshireNorthern/YorkshireNorthernEvents.htm

Management and Leadership courses

Broker Academy runs several courses a year in the North.

Introduction to Management

A course of two days separated by 4-6 weeks for staff who have just been promoted to a junior management role. The course is scheduled to start May 2010. For details go to:

www.biba.org.uk/BrokerStaticPageDisplay.aspx?templatename=YorkshireNorthern/YorkshireNorthernYorkshire2010.htm%20

Leadership and Management course for Owners and very senior managers

This has funding from the Leadership and Management fund. The total cost of the course is £1,500 and funding of £1,000 is available to offset this.

The course runs over 5 days at approximately monthly intervals. Full details and dates are shown at:

www.cii.co.uk/pages/generalinsurance/faculties_societies/ba/regionaltraining.aspx

The funding is only available to the owners/senior managers and for firms of 5 – 250 employees and Train to Gain are only able to process a limited number of funding applications per month, so get in early! [Click here](#)

Others may attend at the full price.

Funding of other Training Projects

In the Yorkshire and Humber economic region we are fortunate in having additional funding available through the Enhancement Fund where 60% funding is available for approved training projects. Members have used this for an IT training project and a specific management project. It is only really suitable for training by one provider as

the paper work is rather cumbersome but the provider will arrange most of this for you. The overall co-ordinator for this is the Business Link Customer Information Centre on 08456 048048 or info@businesslinkyorkshire.co.uk or your training provider.

More information on the Enhancement Fund is available at www.enhancementfund.co.uk