

Annual Report: 2023-2024



The Insurance
Institute of Leicester
Chartered Insurance Institute

Introduction

As is traditional, this report covers the Presidential year from April 2023 to now. And it's been a busy year over which our President, **Stephen White** Cert CII, has presided. Continuing Professional Development (CPD) events and examination training have been the main focus, but the usual full range of events hasn't been neglected.

We have again scored 100% in our performance assessment by the CII. This largely reflect activities during the year of Immediate Past President **Sue Hull**.

Continuing Professional Development

Our decision in 2022 to expand our Education Committee has proved its worth. It's met eight times in the past year. Many of our events are virtual but there's just as much work in putting them on as there was for the traditional lectures at places like the Grand Hotel/Mercure. Speakers are selected and booked, platforms are agreed and the event advertised to members. And there are many more events than in pre-covid times. This year we have organised five General Insurance CPD sessions, two PFS CPD sessions and four general webinars for everyone. Our two best attended were Reviewing Contracts for Insurance Implications and, perhaps surprisingly, Marine Cargo.

We still circulate weekly to members who want it – and to members at 32 other Local Institutes - a list of forthcoming CPD webinars provided by every Institute in the country. If you want to receive this, please email membership@theiil.org.uk

Examinations

In early 2022, we started a virtual ACII tuition course. The formal tuition has just finished and we are starting to see the results as candidates complete their course assignments. Of the ten that started, six have passed, three are nearly there (and confident) and one has left the industry. A better outcome than we had dared to hope for.

In early 2023 we started a Dip CII course. Tuition is still ongoing, so we won't report prematurely. Also in early 2023, we started Cert CII training. We had fourteen candidates for the first subject, the compulsory IF1 Legal & Regulatory. After that, numbers dropped as candidates wanted different subjects, depending on whether they worked for a broker, an insurer or an adjuster. However, we were able to fill some of the places with members of other Institutes. All the training was virtual. It's what both candidates and employers prefer.

With all this experience under our belt – probably more than any other Institute in the country – we reviewed training and concluded there must be a better way. If many Institutes combined, it should be possible to run continuous virtual training from Certificate to ACII over four years, with choices of subjects, at a cost that any Institute could afford. The full details are [here](#). Education Secretary, **Keith Torrance**, put our idea to the 53 other Institutes in the UK – twice. Sadly, only a few advertised the scheme and put their members onto our programme. We ran the Cert tuition – 15 Leicester members participated. But we've paused the next stage while we find out from other Institutes how the scheme can be adjusted to appeal to more Institutes – assuming they are interested in providing GI exam training to their members at all.

We have also been running examination training for PFS members. In conjunction with Bespoke Training Solutions (BTS) and East Midlands PFS, we have (well, PFS Rep **Janice Fielding** has) run ten days of revision courses in Diploma subjects. Again, we have learnt through practice and made changes during the year to make the process more efficient. Full details of courses are in the list of educational events at the foot of this report.

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Whilst on the subject of exams, we have received adverse feedback from some members about their experience when taking online exams, particularly at home. A Local Institute has no involvement in this process, but we have passed on the concerns and understand that improvements have been made.

Prize-Winners

We give two prizes for best performance in examinations. This year's winners are:

Best performance at Advanced Diploma (Associateship) – Harriet Lee APFS of Fiscal Engineers. Harriet had 12 passes, no fails and the highest average mark out of ten achievers in her year. She wins £500.

Best performance at Diploma – Benjamin Frith Dip CII of PIB Insurance. Ben had seven passes including four distinctions, a remarkable achievement. He wins £250 (and a bottle of champagne, presented at the Annual Dinner).



Ben Frith (right) receiving his prize from Stephen White and CII Deputy President, Ian Callaghan (left), at the Annual Dinner. Unfortunately, Harriet Lee was unable to attend.

New Designations

We award a cheque of £200 to every new Fellow, presented at the next Annual Dinner. Since our last report, **Jeremy Burditt** (St James's Place), **Nicola Charman** (Myers Davison Ginger), **Tobias Colton** (St James's Place) and **Nathan Richardson** (Brewin Dolphin) have all achieved Fellowship of the Personal Finance Society.

Congratulations also to all others who have gained a new designation:

Associate of the CII (ACII): Jonathan Croot (Aviva), **Florence Dennis** (Partners&) and **Ana Gomes-Freire** (Berkeley Group).

Associate of the PFS (APFS): Jack Silk (Killik)

Diploma of CII: Cerys Brown (Eastlake & Beachell), **Anjali Pattni** (Hastings Direct) and **Noel Cockayne**.

Diploma of PFS: Mark Carvell (James & James), **Akshay Gohil**, **Katie Hazelwood** (Cooper Parry), **Taylor Hillery** (Mattioli Woods), **Aimee Hogg** (Furnley House), **Kaylan Holmes** (PSA Financial), **Ernest Ibe** (Mattioli Woods), **Aird Ilersic**, **Penny Marr** (Fairstone), **Dillon Shah**, **Max Spencer** (Mattioli Woods), **John Webb**, **Arti Whatsize** and **Daniel Wootton** (Westerby Trustee Services).

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Congratulations also to all of our new Certificate holders, too numerous to mention.

Field Trips



We again ran a trip to visit Lloyd's and the Royal Courts of Justice with experienced tour guide **Flo Dennis** in charge. This isn't just for newcomers to insurance. As two on the trip said, they'd worked in insurance for 15 years and never been to Lloyd's.

After our first visit there in 2022, we told other Institutes how we'd arranged an insurance theme for the Courts of Justice leg of the visit. It's interesting to see that the Insurance Institute of London has now starting visiting a building on its own doorstep; see [here](#). As we like to observe, *where Leicester leads, London follows*.



Closer to home, a group of 14 visited the iconic Triumph Motorcycle's factory at Hinckley on 29 November. In this behind-the-scenes tour we were able to get close to the production line and also saw various other parts of the plant. We learned about storage of the bikes (a maximum number of 2,683 were shipped in a single week!) and got a real insight into the research and development at the plant. We also gained an understanding about the use of 3D printers, spray painting (which is still all done by hand), quality control and testing, Health and Safety considerations and the use of robotics. The aim of visits like this is to give desk-bound insurance staff the chance to see manufacturing, assembly and storage sites so they can better appreciate the risks they are dealing with. As tour organiser **Sue Hull** commented: it's over ten years since we last visited Triumph, but it won't be so long before we visit again.

Our next trip is likely to be to the Building Research Establishment.

Sports & Social

We 'kicked off' the year with our annual five-a-side football tournament at the Goals Soccer Centre, Crown Hills on 16 May. After a keenly fought contest, **Chesterton House Financial Planning** emerged as the winners.

We did enquire amongst our neighbouring Institutes whether there was any interest in running a champion-of-champions tournament. Out of ten Institutes, only one other ran a tournament. Yet again Leicester punches above its weight.

In view of the increasing interest in women's football, we took soundings about holding a women's competition, possibly at the same time. However, there didn't seem to be sufficient interest; maybe something for us to revisit in a few years. Mixed football teams in England are only allowed for under-18s.

Just a quick plug for this year's men's competition - Tuesday 21st May, 6:30-8:30pm, closing date for entries is 3 May, more information [here](#).

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Two days later, it was time for something less physical. The annual music quiz was held at the University of Leicester's Attenborough Arts Centre. Our veteran Quizmaster, **Mal Fairhurst**, ably supported by new Sports & Social Secretary, **Callum Shevas**, posed questions covering many decades and genres. 13 teams entered and, after the six rounds were completed, there was a tie for first place. A tense tie-break didn't do what it said on the tin, so the first prize was shared between **Albright Bishop Rowley** and **University of Leicester**. The full results are [here](#).

On 12 October, we ran a Cocktail-making evening – and it wasn't just younger members who were interested. Students of alcohol gathered at the Revolution Bar on New Walk, Leicester, for an evening of mixing, muddling, shaking and sipping.

Talking of alcohol, we also ran an interesting session on sensory awareness on 29 September. Jeff Heasman of Insurance Upskill talked us through the key elements of sensory awareness, the link with mental wellbeing and strategies to engage in more sensory awareness. Sensory awareness is also a fundamental part of wine tasting so Jeff then took us through the use of sensory awareness techniques to taste different wines from Spain and Portugal. A CPD event with a difference.

Annual Dinner

70 Leicester members, 42 members of other Institutes and 58 non-members – a total of 170 – attended the 107th Annual Dinner at the Leicester Marriott on 3 November. The President's Guest of Honour was the County's Lord Lieutenant, **Mike Kapur**, visiting us again. This time he was in civilian clothes as a patron of our President's chosen charity, Vista. Our other Guest of Honour was CII Deputy President, **Ian Callaghan**.



From left to right: Angela Irvine (President, Birmingham II), Phil Willis (Vice President, II Bedford & Milton Keynes), Florence Dennis (Chair, BIBA East Midlands), Robert Boland (President II Coventry), Chloe Nickless (President, II Northampton), Stephen White, Sue Hull, Phil Hayes (President, II Peterborough), Jerry Robinson (CEO, Vista), Mike Kapur (Lord Lieutenant of Leicestershire), Iain Atkinson (Lincoln II), Ian Callaghan (Deputy President of CII).

For those who keep track of the gender balance, 44% of those attending were female, up from 33% five years ago and 27% 20 years ago. On Top Table, 43% were female. During his speech, the President thanked the (all-female) Dinner Committee of **Mary Rogerson, Allison Marshall, Julie Rayson-Flynn** and **Sue Hull** for their hard work. The event was 007 themed so, after the meal, we had chance to test our luck in our own Casino Royale. There are more pictures of the evening [here](#). Many thanks to our sponsors: **Arch, AXA, Brokerbilty, Clear, Fairstone, IDEX, RSA, Towergate** and **Weightmans**.

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Charity

Leicester currently has eight beneficiaries being supported by Insurance Charities. The financial value of that support has recently increased significantly. In 2023/24 it was £49,400 – 90% more than in the previous period. The needs arise for various reasons ranging from day-to-day hardship, rent, white goods, furniture, funding children's activities and family holidays.

We encourage everyone to spread the word about Insurance Charities as it offers real support for both current and former insurance employees, and their dependants. Details are on the website [here](#) and there is a simple online application. Our Leicester Insurance Charities representative is **Janice Fielding** and Insurance Charities Awareness Week is taking place on 24th-28th June.

This year's President's charity was Vista. It's a local charity, based in New Walk, supporting people with sight loss. It caters for all ages – children, adults with complex needs and older people – and runs four care homes. The collection at our Dinner raised £1,201.

Next Gen and Careers

Flo Dennis co-ordinates our Careers activity. Part of the materials she uses is the CII's New Gen 'Insurance Influencer' video which is very appropriate since she features strongly in it. If you haven't seen it, click [here](#); very slick and professional. Following the custom that the youngest member of Council should be engaging in careers conversations with students, **Amy Godson** is now assisting Flo. Amy is pictured below, 2nd from right, with colleagues from **AJ Gallagher** at the Beauchamp City Sixth Form College in March.



Personal Finance Society

Our PFS members on Council have been active. To get ideas on how we and larger employers can work together, we've met with some of them during the year.

In 2023, three East Midlands Regional Conferences were held at the East Midlands Hilton, with a variety of speakers providing relevant CPD. There has been a shift in the approach to CPD for the PFS in 2024 as PFS Xchange and PFS Local are introduced.

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PFS Xchange introduces Centralised CPD event design & delivery; larger, multi-streamed events offering a greater choice of content; balanced technical and skills content including all segments of the FS membership and a centralised digital programme. One of the Summer PFS Xchange will be held at Leicester's King Power Stadium on 11 June 2024 and the theme will be Real World Opportunities - the Budget, AI, Technology and Sustainability, with Key Speakers Tony Wickenden, Carla Brown, Derek Mills and host Sarah Adekola- book [here](#).

PFS Local – East Midland PFS Committee is chaired by **Alan Sensicall** of Sheffield. **Janice Fielding**, the PFS representative on our council, attended the PFS Officers Conference on 1 November which was held the day before the PFS Annual Conference. Although Janice has since stepped down from the PFS East Midlands committee as Professional Qualifications Officer, she continues to work closely with the PFS Region arranging Diploma revision support and relevant CPD events for our members.

Regional/National

Our President and Deputy attended the CII's National Network Conference in Southampton on 21st June. The CII's new [five-year plan](#), with its themes of Excellent Member Experience, Highest Professional Standards, Sector Thought Leadership, World-Class Learning, Digital First and Sustainable Institute, was well received. In break-out sessions, a number of Institutes shared their ideas on best practice.

The CII Board under its chair, **Dr Helen Phillips**, has won praise for getting out and about to visit Local Institutes. Deputy President, **Ian Callaghan**, attended our 28 June Council Meeting, the first time in living memory that a Board Officer has visited. Digital Town Hall Meetings with the CII's CEO have been an interesting and generally successful innovation.

Our Midlands Regional Forum Delegate, **Michelle South**, and the President have each been able to attend two of the four meetings during the year. Our Regional Delegate to the Local Institute National Forum is **Juliet Williams** of Nottingham. The value of the Forum meeting has probably best been shown over Leicester's exam training initiative, Project Minerva (named after the Roman Goddess of Knowledge). Possibly as a result of the scheme being explained during a Forum meeting, 83% of members participating came from Midlands Institutes.

Communications

The good news is that you are reading this report. We try hard to communicate with our members in a variety of different ways. There's email, of course. But not every member gives permission to receive emails. As a Local Institute, we don't send out that many emails in a year. Maybe you are reading this report because the CII Rep in your office has circulated it? If so, do check your permissions [here](#) (you'll need to log in). If you don't allow anything else, please tick 'news, events and CPD content from my Local Institute'.

Our Comms Officer, **Flo Dennis**, also ensures that the message gets out via LinkedIn and X/Twitter. We recently hit the 500 mark on Linked-In – a great milestone from a 2022 launch. We get good engagement on our posts, average 'likes' are around 20. Our post about the annual dinner got 58! We've seen examples this year where members of other Institutes have read about one of our initiatives and asked if they could join in. Like other Local Institutes and, indeed, other member organisations, we don't send out communications by mail anymore. If you don't receive communications from us in one digital form or another and don't want to, we'd ask that you diary to check our [website](#) fortnightly or monthly for events and news.

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Membership

We have 1640 members, split 854 General Insurance, 761 Financial Services and 25 Mortgage Professional. That's an increase of 3% over the year. After years of steady growth, the Financial Services membership has been static over the last year. It's the GI side that has grown by 6%.

Finance

Although our business year is from AGM to AGM, our financial year end is 31 December. We receive a grant from the CII to enable us to operate. Our main role is to spend around 80% of that grant on educational activities – more if we are carrying surplus reserves or run sponsored educational events. In 2023, we met that target.

The Dinner and social events should, overall, break even. This year we sustained a loss on the Dinner. There's been a delay in uploading the full accounts to our website but they will be [here](#) shortly.

Annual General Meeting

The AGM will be held on Wednesday 24 April, 6pm, at the Leicester Marriott. To help administration and catering, we ask that those attending book in advance; click [here](#). The Report and Accounts will be presented for approval and incoming President-Designate **Brian Brookes** Dip CII will outline his plans for the next Presidential year. If any member is interested in helping to organise events or joining the Council and wants to know more about what's involved, please contact our hard-working and long-serving Secretary, **Mary Rogerson**. More PFS representation would be particularly welcome.

Council

Your Council for 2023/24 is shown below. It met six times during the year, on 17 May, 28 Jun, 6 Sep, 8 Nov, 17 Jan and 20 Mar. Attendance and possible attendance is also shown.

President - **Stephen White** Cert CII (Leicester City Council) 6/6

Deputy President, Deputy Treasurer and Vice President - **Sue Hull** ACII, Chartered Insurance Broker (Berkeley) 5/6

Secretary – **Mary Rogerson** 5/6

Treasurer – **Mal Fairhurst** ACII, Chartered Insurance Practitioner 0/6

Deputy Treasurer - **Grant Scott** ACII Chartered Insurance Broker (NFP) 4/6

Deputy Treasurer, Sponsorship and Vice President – **Julie Rayson-Flynn** Cert CII 3/6

Education and Membership Secretary – **Keith Torrance** FCII, DMS, MCMI, Chartered Insurance Practitioner 5/6

Communications, Publicity, Next Gen Chair, Careers and Vice President – **Florence Dennis** ACII (Partners&) 1/6

PFS Planning and Charities Rep – **Janice Fielding** FPFS, FCII, Chartered Financial Planner (Fairstone) 4/6

Sports & Social – **Callum Shevas** BSC (Hons) ACII (Abaco) 3/6

Equality, Diversity & Inclusion Co-ordinator – **Ana Gomes-Freire** ACII (Berkeley) 2/4

Dinner Secretary – **Allison Marshall** (Idex) 1/6

Regional Forum Delegate – **Michelle South** Cert CII (Clear) 3/6

Vice President - **Adrian Mee** B Soc SC (Hons) Dip PFS (WKM Wealth) 2/6

Pardeep Gill ACII Chartered Insurance Broker 5/6

Amy Godson Cert CII (AJ Gallagher) 4/4

Michael Langman Cert CII (WTW) 2/6

Andy Miller Dip CII (Enable) 0/6

Tom Mulligan Cert CII 3/6

Mathew Undenge FCII, Chartered Insurance Broker (Aon) 0/4

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Mal Fairhurst is standing down from Council after 32 years of continuous service. He was Education Secretary from 1992 and President in 1998/99. He has done two stints as Treasurer – a particularly onerous job, now handled by three people. The first was 1999-2017, plus another two years more recently. He was also our Treasure Hunt organiser using his extensive knowledge of Leicester’s history (not bad for a Scouser), our quizmaster (both music and general knowledge) and generally ensured that Council ran professionally. **Andy Miller**, who is also standing down, became Chair of our Young Members Committee in 1991, subsequently joining main Council in 1995 and serving as Dinner Secretary for four years. After a break, he rejoined Council and was President in our centenary year, 2014/15. **Mike Langman** is standing down after two years’ service. **Ana Gomes-Freire** resigned during the year, having brought new insights to the Equality, Diversity and Inclusion role, and **Mathew Undenge** also resigned. The President has thanked all for their service.

EDUCATIONAL EVENTS 2023/24

Date 2023	Subject	Presenter	Medium	Soc	Attendance
03 May to 12 Jul	Cert CII. I10 Broking Fundamentals. 6 x 2hrs	Alison Cooper, ACT One Training	Virtual	GI	6
2&5 June	Dip PFS. R04 Pensions & Retirement Planning. Two-day revision.	Dawn Jukes Bespoke Training Solutions	Virtual	PFS	12
20 Jun	FCA General Insurance Consumer Duty and Update.	Branko Bjelobaba	Webinar	GI	40
28 Jun	Can physical damage be caused by a cyber-attack?	Tiago Dias, FM Global	Webinar	GI	64
13 Sep	Wine and Wellbeing.	Jeff Heasman, Insurance Upskill	F2F	ALL	16
21 Sep to 29 Nov	Cert CII. IF2 General Insurance Business. 7 x 2hrs.	Alison Cooper, ACT One Training	Virtual	GI	8
03 Oct	Lloyd's and Royal Courts of Justice Field Trip.		Field F2F	GI	10
18 Oct	Emerging Risks in Insurance.	Diane Jenkins, Thomas Associates	Webinar	GI	57
24 Oct	Resilience for Good Mental Wellbeing.	Claire Russell, Mental Health in Business	Webinar	ALL	20
25 Oct	Can we SIPP it or is it a little SSASSY	Kerry Houghton, @SIPP	Webinar	PFS	14
07 Nov	Introduction to Marine Cargo Insurance.	Jennifer Yeates, Zing365	Webinar	GI	75
21 Nov	Men’s Mental Health in Movember.	Steve Heath, Mental Health in Business	Webinar	ALL	51
29 Nov	Triumph Motorcycles Factory Tour		Field F2F	GI	14
1&4 Dec	Dip PFS. R03 Personal Taxation. Two-day revision.	Rhoda Mortimer Bespoke Training Solutions	Virtual	PFS	12
2024					
8 Jan – 18 Mar	Cert CII. IF1, IF3 and IF4 training. 9 x half days.	Matt Owen-James, Zing365	Virtual	GI	15
16 Jan	Financial Stress and Mental Health	Jay Unwin, Mental Health in Business	Webinar	ALL	35
28 Feb	Reviewing contracts for their insurance implications.	Diane Jenkins, Thomas Associates	Webinar	GI	76

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9 & 10 Apr	Dip PFS, R06 Financial Planning Practice. Two-day revision.	Bespoke Training Solutions	Virtual	PFS	
11 & 12 Apr	Dip PFS, R06 Financial Planning Practice. Two-day revision	Bespoke Training Solutions	Virtual	PFS	
17 Apr	Budget and Beyond 6 April 2024	Fiona Hanrahan, Royal London	Webinar	PFS	
19 & 22 Apr	Dip PFS, R01 FS Regulations & Ethics. Two-day revision.	Bespoke Training Solutions	Virtual	PFS	

Webinar indicates a session of one-hour or so. Virtual indicates a longer session – half or full day.

PFS Revision sessions are all run in conjunction with our colleagues at CII Nottingham.

Below are photos from some of our other events this year: The Cocktail-Making evening, Jeff Heasman’s Wine and Wellbeing seminar, the AGM and more from the Dinner.



Wine & Wellbeing



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Links

For those not reading this report digitally, the weblinks are:

<https://www.localinstitutes.cii.co.uk/leicester/home/about-us/news/202324/general-insurance-examination-training-four-years-from-start-to-chartered/>

<https://www.iilondon.co.uk/home/cpd-programme/visits/2024/visit-to-the-royal-courts-of-justice-and-rolls-building>

<https://www.localinstitutes.cii.co.uk/leicester/home/events/202324/5-a-side-football-tournament/>

<https://www.localinstitutes.cii.co.uk/media/23157/music-quiz-scoreboard-2023.xlsx>

<https://www.localinstitutes.cii.co.uk/leicester/home/about-us/news/202324/107th-annual-dinner-pictures/>

<https://www.theinsurancecharities.org.uk/help-and-support/how-we-help/>

<https://vimeo.com/877513301> What is Insurance?

<https://ciigroupevents.eventsair.com/summer-xchange-real-world-opportunities---leicester/registration/Site/Register>

<https://www.cii.co.uk/about-us/strategic-plan/>

<https://www.cii.co.uk/login>

<https://www.localinstitutes.cii.co.uk/leicester/home/about-us/news> for accounts when loaded to website

<https://www.localinstitutes.cii.co.uk/leicester/home>

<https://www.localinstitutes.cii.co.uk/leicester/home/events/202324/annual-general-meeting-2024/>