



Working together to provide qualification support and motivation



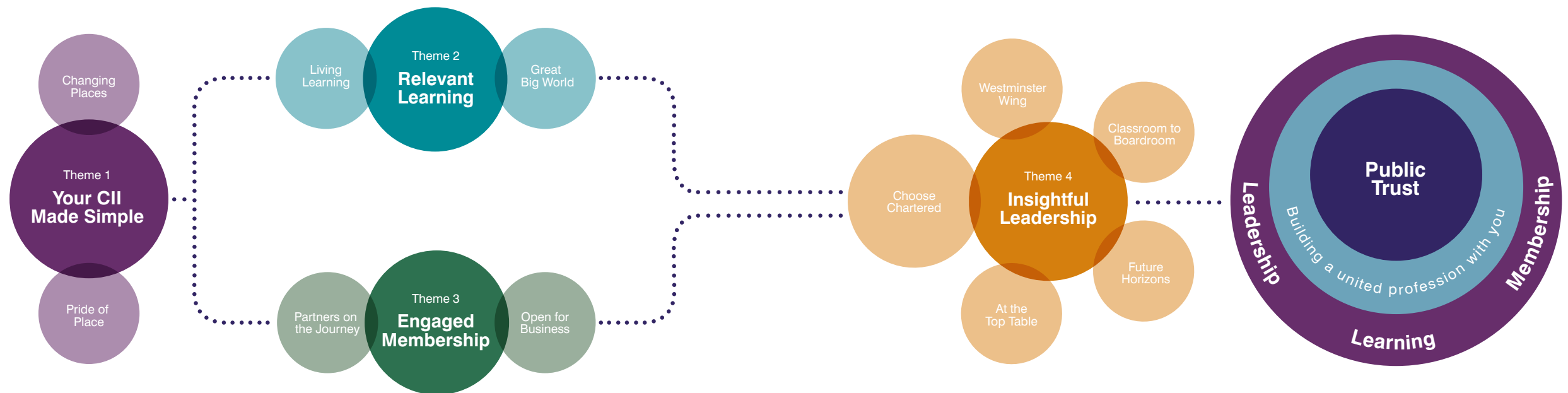
The Insurance
Institute of London
Chartered Insurance Institute

Qualification Mentoring Scheme
2018 pilot intake

iilondon.co.uk

cii.co.uk

“The CII is here to build public trust”



“The reputation of London as a global centre of excellence in insurance and financial services relies on the talent and expertise of those operating in it.”

Sian Fisher ACII,
CEO, The Chartered Insurance Institute

“For the public to trust us, we must first earn that trust by getting qualified and by committing to career-long professional development and ethical behaviour.”

Roger Sanders OBE, CertPFS,
President, The Insurance Institute of London

Where did this scheme come from?

For the public and global corporates alike, trust is vital. We need to earn that trust by getting professionally qualified, committing to continuing personal development and working to high ethical standards. The IIL established a three-year Qualification Mentoring Pilot Scheme in 2016 which supports students who can't otherwise access an employer mentoring scheme. It is one of the IIL's contributions to the London Market Group's Talent and Diversity drive to help ensure that the London Market has a well-qualified workforce and London retains its global reputation as the centre of excellence in insurance.

The scheme takes a peer-led, team-based approach to encourage and support members in achieving the Advanced Diploma in Insurance (ACII) or the Advanced Diploma in Financial Planning (APFS) - over the course of three years.

How does the scheme work?

This pilot scheme is now open for applications to join the 2018 intake.

- The scheme is being extended this year to include financial planning students.
- There are 40 Mentee and 12 Buddy Mentor places available (eight Mentee and two Buddy Mentor places are for financial planners).
- We promote a 'team' structure - five teams with two Buddy Mentors and eight Mentees per team. Wider communication across teams is also highly encouraged, to share knowledge and experiences.
- The scheme includes five educational, motivational and social events per year, to promote networking within the industry and to develop other critical professional skills (see page 6).
- Mentees are expected to attend three compulsory events in the first year; other events are optional and will depend on study progress.

During the pilot phase, there will be no charge to take part in the scheme. The Insurance Institute of London thanks all those individuals and firms who freely give time, expertise and resources to enable us to deliver it free of charge. These partners are committed, and applicants must also demonstrate their commitment to achieving the Advanced Diploma in Insurance (ACII) or Advanced Diploma in Financial Planning (APFS) within three years, with the support of this scheme.

Glossary

Advocate Mentor

A business leader (typically a CEO).

Buddy Mentor

A member in London, who qualified at Advanced Diploma level (ACII or APFS) in 2016 or later.

Mentee

A member in London, committed to achieving the Advanced Diploma in Insurance or the Advanced Diploma in Financial Planning over a three-year period.

Acknowledgements

The Insurance Institute of London would like to thank everyone who has contributed their expertise and facilities. Their generosity enables the scheme to be delivered without charge to students and their employers.

Information for Mentees

Why join this qualification mentoring scheme?

Studying can be a lonely experience. It can be daunting to study on top of a busy job and active social life. Some find the array of subjects confusing when it comes to deciding the order in which to take them, others have previously found the step up from Certificate to Diploma level bigger than they were expecting and members can also struggle due to a lack of employer support. This scheme aims to provide motivation, via a peer group led by a Buddy Mentor – someone who has recently qualified themselves so has fresh first-hand experience of the challenges you will face.

Benefits include:

- Access to Buddy Mentors who are familiar with the stresses and strains.
- Support with learning and assessment challenges, for example how best to group subjects together to maximise the credits from your studies.
- Time management, work/study planning and examination/assignment techniques are all useful life skills as well as being essential for examination success. Get top tips from expert tutors, who have business experience themselves.
- Tried and tested content from the Chartered Insurance Institute and Insurance Institute of London (IIL), with a logical scheme structure, experienced presenters plus contacts who can give you extra support.
- The opportunity to attend the IIL Young Members' Winter Ball in the year you qualify (subject to your employer agreeing to pay for you to attend; currently £145).
- In addition to the Buddy Mentors, this scheme is supported by a dozen Advocate Mentors, who are drawn from among the leaders of the profession – typically they are CEOs of major firms. By joining this scheme, you will have opportunities to network with them in person, in a relaxed social setting, and you can find out how they made it to the top.

How to apply

Please complete the application form on page 7 and email it together with your CV to lindsey.maddison@cii.co.uk

Next steps

If you would like to find out more about our programme, we will be holding an introductory session on Monday 04 December 2017 at 16:00-17:00. This session will provide an opportunity for you to hear first hand from a current Mentee, Buddy Mentor and Advocate Mentors. To reserve your place, please book online at iilondon.co.uk prior to Friday 01 December 2017.

The fine print

This scheme isn't:

- An 'easy option' with all the work done for you! The Buddy and Advocate Mentors provide their time for free and the onus is on you, the Mentee, to drive the relationship.
- A 'one-to-one' career/personal coaching programme. If you are looking for career coaching, please contact us for advice and guidance on sourcing services of this nature.
- A mechanism for advice on specific assessments or technical learning issues.
- A magic solution if you don't study or attend. You will still need to do the work, contribute, share and give feedback.
- A prison sentence! This is a three-year commitment. We want you to succeed but appreciate that circumstances change. If you cannot continue to participate, just let us know by emailing allison.potts@cii.co.uk.

Full joining terms and conditions can be found on page 9.

Information for Buddy Mentors

Role of the Buddy Mentor

We are looking to recruit 12 volunteers to be Buddy Mentors for our 2018 intake.

Buddy Mentors will:

- have qualified at Advanced Diploma level (ACII or APFS) in 2016 or later;
- be happy to commit to three years as a Buddy Mentor;
- have sufficient time to follow up attendance and motivation of Mentees. It is envisaged Buddy Mentors will have four Mentees within a team of eight alongside another Buddy Mentor;
- have a working knowledge of CII's RevisionMate and willingness to undergo basic familiarisation with the new learning and assessment programmes; and
- be prepared to attend all of the events listed on page 6.

Personal qualities required of a Buddy Mentor

We are looking for volunteers with:

- a positive outlook;
- an interest in leadership;
- an open mind; and
- the ability to work and communicate with people at all ages and stages of their career.

While the onus is on the Mentee to forge and to drive the relationship, Buddy Mentors are expected to be proactive if the need arises and to share the responsibility for motivating Mentees, encouraging their regular engagement and attendance at events.

Why volunteer?

Perhaps you have reached a stage of your career when you would like to put something back into your professional community. Volunteering as a Buddy Mentor is a real, practical way of doing so.

You will have the opportunity to build relationships with Advocate Mentors who are drawn from among the leaders of the profession – typically they are CEOs of major firms. This will help to expand your network.

You can also state your mentoring experience on your professional CV.

The fine print

This is a qualification mentoring scheme, not a career mentoring scheme. Being a Buddy Mentor isn't an opportunity to recruit new staff – the poaching of mentees from their current employer is unacceptable.













How to apply

Please complete the application form on page 8 and email it together with your CV to allison.potts@cii.co.uk

Next steps

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Qualification Mentoring Programme 2017-18

| Date | Time | Title | Who should attend? | Objectives | Speakers |
|-----------|---|--|---|---|--|
| 04 Dec 17 | 16:00-17:00 | Introducing the Qualification Mentoring Scheme | Potential Buddy Mentors, Mentees and their employers | <ul style="list-style-type: none"> The pilot scheme so far What to expect from the scheme First-hand experience from current participants <p>To reserve your place, please book online at iilondon.co.uk prior to Friday 01 December 2017.</p> | <p>President, Insurance Institute of London</p> <p>Chair, Qualification Mentoring Committee</p> <p>You will also hear from a Buddy Mentor, a Mentee and an Advocate Mentor</p> |
| 29 Jan 18 | 15:00-17:00 followed by optional drinks | Launch plus meet your Buddy Mentors and teams |    | <ul style="list-style-type: none"> Welcome and introduction How to get the most out of the mentoring scheme Role of a Buddy Mentor Role of a Mentee | <p>Chair, Qualification Mentoring Committee</p> <p>Anna Wright FCIPD</p> |
| 26 Feb 18 | 13:00-14:30 | Pathways to qualification and CII study tools |   – if relevant at the time | <ul style="list-style-type: none"> Overview of qualification levels and points required Requirements at Diploma level Requirements at Advanced Diploma level Mixed assessment at Diploma level How to get the best out of RevisionMate and other CII study tools | <p>Linda Prewett FCII, Trainer</p> <p>Simon Graham, Learning and Assessment Director, Chartered Insurance Institute</p> |
| 05 Mar 18 | 13:00-14:00 | Accelerated learning techniques |   | <ul style="list-style-type: none"> Memory principles Techniques: <ul style="list-style-type: none"> Number lists Room system Journey system Mind maps Application to study | Rob Murray ACII, Trainer |
| 12 Mar 18 | 13:00-14:30 | Examination, mixed assessment and coursework assignment techniques |   – if relevant at the time | <ul style="list-style-type: none"> Using published CII guidance and resources How to deconstruct the question Build a coherent assignment The importance of understanding the CII marking matrix Using your company contacts for source Information | Mark Butterworth FCII, Trainer |
| 02 Jul 18 | 17:30-20:00 including food and drinks | Summer social |    | <ul style="list-style-type: none"> Networking | |

Qualification Mentoring Scheme Application Form – Mentee

- Complete the application form and email together with your CV to lindsey.maddison@cii.co.uk
- Applications will be accepted from 04 December 2017 to 05 January 2018

| | | | | | | | |
|--|-----|-------------------------|-------------------|-------------------------------------|--------|--------------|--------------------|
| Mr/Mrs/Miss/ Ms/Other | | Surname/ Family name | | Forename/ Given name(s) | | | |
| Are you a graduate? | Yes | No | Date of birth | Do you hold any CII qualifications? | | Yes | No |
| CII/PFS PIN (if known) | | | Area of business: | Broking | Claims | Underwriting | Management |
| Speciality (e.g. Aviation, Financial Planning, Property, Reinsurance) | | | | | | | Financial Planning |
| Employer's name | | | | | | | |
| Job title | | | | | | | |
| Work address | | | | | | | |
| Postcode | | | Country | | | | |
| Home address | | | | | | | |
| Postcode | | | Country | | | | |
| Email | | | Tel | | Mobile | | |
| Address to be used for correspondence | | Home | Work | Linkedin profile URL | | | CV supplied? |

Qualification mentee declaration

I declare that all information provided by me on this form is true and correct.

If selected, I will contribute to the IIL Qualification Mentoring Scheme to the best of my ability and agree to fully comply with the Mentoring Terms and Conditions set out in this brochure (see page 9). I will keep in regular contact with my mentor and will inform the IIL in case of any issues.

Signature

Date

Qualification Mentoring Scheme Application Form – Mentor

- Complete the application form and email together with your CV to **allison.potts@cii.co.uk**
- Applications will be accepted from 04 December 2017 to 05 January 2018

| | | | | | | | | |
|---|-----|-------------------------|-------------------|--|----------------------|--------------|------------|--------------------|
| Mr/Mrs/Miss/ Ms/Other | | Surname/ Family name | | Forename/ Given name(s) | | | | |
| Are you a graduate? | Yes | No | Date of birth | When did you complete the CII Advanced Diploma in Insurance or Advanced Diploma in Financial Planning? | | | | |
| CII/PFS PIN (if known) | | | Area of business: | Broking | Claims | Underwriting | Management | Financial Planning |
| Speciality (e.g. Aviation, Financial Planning, Property, Reinsurance) | | | | | | | | |
| Employer's name | | | | | | | | |
| Job title | | | | | | | | |
| Work address | | | | | | | | |
| Postcode | | | Country | | | | | |
| Home address | | | | | | | | |
| Postcode | | | Country | | | | | |
| Email | | | Tel | | Mobile | | | |
| Address to be used for correspondence | | | Home | Work | Linkedin profile URL | | | CV supplied? |

Qualification mentee declaration

I declare that all information provided by me on this form is true and correct.

If selected, I will contribute to the IIL Qualification Mentoring Scheme to the best of my ability and agree to fully comply with the Mentoring Terms and Conditions set out in this brochure (see page 9).

Signature

Date

Mentoring Terms and Conditions

The Insurance Institute of London (IIL) is committed to providing a mentoring environment where all Buddy Mentors and Qualification Scheme Mentees are treated with dignity and respect. By participating in this mentoring scheme, you agree to abide by these terms and conditions.

Buddy Mentors are volunteers who have skills and experience and have given up their time to assist Mentees in completing the Advanced Diploma.

By joining, Mentees are agreeing to:

- Maintain a CII/PFS membership and membership of the Insurance Institute of London (or be willing to transfer your membership from another local institute) throughout the scheme.
- Have an active LinkedIn account.
- Share your email address with IIL staff, Buddy Mentors, Advocate Mentors and other Mentees in the scheme to send you details of mentoring events and to exchange opinions and information about the qualification mentoring scheme. This data is not to be used for procuring employment or business.
- Allow IIL staff to share your progress with your employer and Qualification Mentoring Committee members.
- Attend three mandatory events in the first year.
- Complete feedback forms and surveys from time to time to help fine-tune this pilot scheme.

Mentors and Mentees agree:

- To be subject to and comply with the CII's Code of Ethics found at: cii.co.uk/code

1. Liability

- 1.1 The IIL does not provide mentoring services but has established a pilot mentoring scheme that will enable Buddy Mentors and Qualification Scheme Mentees to meet. Mentees acknowledge that any services provided by a Buddy Mentor during the pilot mentoring scheme are provided free of charge and in good faith.
- 1.2 The IIL takes reasonable steps to ensure the quality and accuracy of the information provided to the parties during the qualification mentoring scheme but neither the IIL, nor its employees, contractors or associated parties, will be responsible for the suitability of the introductions or the framework nor of the completeness or accuracy of any information, howsoever provided, or the success or otherwise of any qualification mentoring relationship. Except in respect of death or personal injury caused by the IIL's negligence, the IIL shall not be liable to any Party by reason of any representation (unless fraudulent) for any indirect, special or consequential loss or any other loss however caused under the qualification mentoring scheme.

2. Confidentiality

- 2.1 Certain information may pass between Buddy Mentors and Qualification Scheme Mentees that could be confidential. Buddy Mentors and Mentees agree to keep in strict confidence all and any information of a confidential nature which is obtained about any other party or their work during the mentoring scheme. If you are unsure whether the information you have been provided with is confidential, please confirm the position by asking the person that gave the information to you.

3. Data Protection

- 3.1 In the event information passing between Buddy Mentors and Qualification Scheme Mentees contains personal data, you are required to comply with the relevant Data Protection laws. You must ensure that appropriate measures are taken against unlawful or unauthorised processing of personal data, and against the accidental loss of, or damage to, personal data.
- 3.2 Maintaining data security means guaranteeing the confidentiality, integrity and availability of personal data. You must not disclose personal data to anyone without the other party's consent.
- 3.3 You agree that your personal data can be used in compliance with our Data Protection and Privacy statement, as amended from time to time, found at iilondon.co.uk/commons/15788/3648

4. Consequences

- 4.1 You are responsible for complying with these Mentoring Terms and Conditions and you will be personally responsible for any breach of it. It is likely that any breach will result in your expulsion from the mentoring scheme and could lead to disciplinary action by the Chartered Insurance Institute. Please therefore act in a professional and courteous manner.
- 4.2 If you have any query about the content of this policy, please speak to a member of IIL staff.