

Apprenticeship standard (England only)

Insurance Practitioner

Industry: **Financial Services**

City & Guilds code: **7414**

LARS number: **60**



A City & Guilds Group Business

 **Typical duration: 12-18 months**

 **Funding band: 9 (£9,000)***

 **Level 3**

*Funding bands from May 2017.

On-programme learning: We do not intend to deliver this.

End-point assessment: We are open for reservations.

Our Insurance Practitioner apprenticeship provides high-quality, rigorous end-point assessment, at a time convenient for your apprentice.

BIS approved the Insurance Practitioner apprenticeship standard in November 2014 and will replace the existing advanced apprenticeship in Providing Financial Services (General Insurance Pathway) Specification of Apprenticeship Standards for England (SASE) framework.

Developed to meet the needs of employers and designed with input from an employer group including: Aon, Aviva, AXA, Barbican Insurance Group, Bluefin Group, Chaucer, Covea, Lloyds, RSA, Willis, Association of British Insurers (ABI), British Insurance Brokers Association (BIBA) and Chartered Insurance Institute (CII).

City & Guilds – helping you with a tailored package

Our Digital Learning Resources Team has been working together with our well-established network of specialists, colleges and providers, to develop the right tools to support on- and off-the-job training.



Qualification

Qualification as required and specified within the Insurance Practitioner apprenticeship standard.



Learning Assistant

Tracks progress online in real time.



Guidance documents

The guidance document will give information on end-point assessment methods, preparation and other information to support the apprentice, employer and training provider.

Our exclusive support package has been designed to keep your apprentices motivated and on track for successful end-point assessment.

For more information please visit cityandguilds.com

The Insurance Practitioner apprenticeship is an entry-level role into the industry. Duties that this role could be asked to perform in line with the employer's needs are providing support in the acquisition of new clients, provide support in retaining existing clients through the renewal process, handling client queries on products, services and accounting, processing and analysing data to support business objectives, preparing documentation, reports and market research, general office administration, participating in meetings, maintaining internal and external relationships and complying with regulatory requirements.

The apprentice journey



1. On-programme, on-the-job and off-the-job training

Training and development takes place during this part of the apprenticeship which may include a qualification if it is identified as a requirement in the standard.

Formative assessment of skills, knowledge and behaviours is required in the delivery of the standard and this will be outlined in the assessment plan.

Maths and English are required (level varies according to the standard).

1. On-programme: What is required in the Assessment Plan?

We do not intend to deliver on-programme.

How our offer supports on-programme delivery



Qualification

We don't intend to deliver on-programme, but the supporting qualification for the apprenticeship is either the Certificate in Insurance (Cert CII) or the Certificate in Claims Handling (Cert CILA). There are different routes to achieve the credits needed for these qualifications, the route selected will depend on the individual business but must include the mandatory modules as specified by the awarding body.



Learning Assistant

Learning Assistant is an innovative and cost effective e-portfolio solution that allows colleges and training providers to improve dramatically the delivery of their vocational qualifications by tracking progress online in real time.



Guidance documents

End-point assessment guidance documentation. The guidance document will give information on end-point assessment methods, preparation and other information to support the apprentice, employer and training provider.

Maths and English requirements

If your apprentices need to complete maths and English, our popular Functional Skills qualifications fit within apprenticeship programmes and cover the core maths and English requirement for the workplace and further study. We have an extensive support package available, including e-Functional Skills, and an online teaching and learning platform, which guides learners from an initial and a diagnostic assessment, through to being exam ready.

Find out more: [cityandguilds.com/functionalskills](https://www.cityandguilds.com/functionalskills)

2. Gateway

The employer and provider must sign off the apprentice as ready to move on to end-point assessment.

3. End-point assessment

The end-point assessment must demonstrate that the apprentice can perform in the occupation in a fully competent, holistic and productive way.

The assessment will be graded if required by the standard.

The assessment organisation and assessor must be independent of, and separate from, the training provided by the provider and employer.

4. Apprenticeship certification

On successful completion, the end-point assessment organisation will apply to the ESFA for the apprenticeship certification. The certificate will then be sent to the apprentice's employer.

2. Gateway

To move on to end-point assessment, the line manager and training provider will review the apprentice's progress. They will agree whether the apprentice has achieved the competency levels required against all learning outcomes and authorise the apprentice to start their end-point assessment, or they will suggest a remedial plan if required.

3. End-point assessment

City & Guilds is an approved assessment organisation on the Register of Apprentice Assessment Organisations (RoAAO) for this apprenticeship standard. We are able to arrange assessments at a time that is convenient for the apprentice and employer and will provide an end-point assessment handbook for the centre, with guidance on preparing apprentices and how to register.

End-point assessment methods



Reflective discussion

The reflective discussion will take the form of a structured interview with the training provider to explore the content of the portfolio and the learner journey in more detail.

The purpose of the discussion is to:

- clarify any questions about the evidence presented in the portfolio;
- evidence any aspects of the standard that are not already evidenced in the portfolio through discussion of how the apprentice performs their role;
- discuss how the apprentice has progressed in their role, what they have done and their approach to their work.

The discussion will be recorded and uploaded to the City & Guilds EPA portal, along with the portfolio of work, for final assessment by City & Guilds.



Portfolio of work

The apprentice will compile a portfolio of work during the end-point assessment stage. This could be from a range of evidence. The most appropriate types will be identified through discussion with the employer, training provider and apprentice, taking into account the job role and internal systems and processes. A minimum of three different types of evidence within this portfolio are needed to demonstrate competence and authenticate the assessment. Examples could be written work or case studies, internal compliance audits, project work done in the role, formal performance review, appraisal or CPD log.



4. Apprenticeship certification

As well as receiving their ESFA apprenticeship certification, the apprentice will receive a City & Guilds statement of achievement for end-point assessment.

Apprenticeships are changing. Our commitment to you never will.

Progression in the financial services industry with City & Guilds

This apprenticeship is part of our wider offering in the financial service sector. We provide the following apprenticeship opportunities.



This apprenticeship provides professional membership to the Chartered Insurance Institute and/or the Chartered Institute of Loss Adjusters.

Our commitment to you

Complementing our support materials for this standard, at City & Guilds we are dedicated to supporting your wider apprenticeship strategy, with a range of events and webinars run by industry specialists to advise and guide you on preparing for apprenticeship delivery and understanding the new standards and funding.

Our consultancy team runs free-to-fee options to help you prepare for apprenticeship delivery and understanding the new standards and funding.

Information about events, webinars and our consultancy is online:

cityandguilds.com/apprenticeships

How our offer supports you

Technical support

Our Industry Manager and Independent End Assessors are always on hand to answer any questions you might have about end-point assessment.

Customer Services Team

Our dedicated Business Managers and Customer Support Team are here to support you and your learners throughout all aspects of apprenticeships from registration to completion.



More information

Visit Walled Garden to find out prices and if any elements are extra to the package.

Please contact your Business Manager or apprenticeships@cityandguilds.com for further information.