

Apprenticeship standard (England only)

Insurance Professional




Industry: Financial Services

City & Guilds code: 7414

LARS number: 63



A City & Guilds Group Business

-  **Minimum duration:** 24-30 months
-  **Funding band:** 9 (£9,000)*
-  **Level 4**

*Funding bands from May 2017

On-programme learning: Available

End-point assessment (EPA): Open for registrations

The insurance professional is involved in various areas depending on the type of business and the employer needs, for example: broking, client management, underwriting, claims, operations, loss adjusting, reinsurance, risk management, product pricing as well as complaint handling.

BEIS approved this new standard in August 2015 and replaced the Higher Apprenticeship in Insurance Level 4 Specification of Apprenticeship Standards for England (SASE) framework.

City & Guilds – helping you with an expert solution

There are four stages where we can work together to help your apprentices from the start through to successful completion of their training.



Plan

Helping you plan and prepare for the new standards with a bespoke solution to make the most of your investment in apprentices.



Attract

Simple online vacancy and candidate set up, TalentPortal can connect you to the talent you need to fill your apprenticeship vacancies.



Deliver

High-quality, online and offline content to help draw out the skills, knowledge and behaviours to prepare apprentices for end-point assessment as well as tracking options to monitor performance.



Assess

Support for you and your apprentices to prepare for end-point assessment by our first-rate, fully trained assessors. Our simple, flexible service meets the demands of your team and your partners.

The apprentice journey



1 On-programme (deliver)

Training and development takes place during this part of the apprenticeship. It may include a qualification if set 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.

Apprentices have to reach a minimum level of maths and English set by the standard. If they've not previously achieved this, they'll need further study and support.

1 On-programme: what apprentices need to learn

On-programme is the learning phase for apprentices to pick up the skills, knowledge and behaviours set in the standard. Apprentices must complete 20% off-the-job training during on-programme. Specific rules govern this and it must take place in the apprentice's contracted hours.

Apprentices must also complete a supporting qualification. This is either the Certificate in Insurance (Cert CII) or the Certificate in Claims Handling (Cert CILA). There are different routes to achieve the credits required for these qualifications, the route selected will depend on the individual business but must include the mandatory modules as specified by the awarding body.

By passing the apprenticeship, professional registration can be achieved by application to the relevant Professional Body with recognised status of Dip CII, (Chartered Insurance Institute), or Dip CILA (Chartered Institute of Loss Adjusters). It's also a stepping stone on the route to full Advanced Diploma qualification.

Our resources and tools that support on-programme delivery

Our core content for this standard covers Prevent, British values, equality and diversity, and health and safety which gives you the basics to deliver the standard and satisfy regulators. It's a blend of e-learning and downloadable content.

We also have:



Learning Assistant

Innovative and cost effective e-portfolio solution that lets you dramatically improve the delivery of their apprenticeship standards by tracking apprentices' progress online in real time. And helps authorise and evidences 20% off-the-job learning.



Guidance documents

The guidance document gives information on EPA 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 Assess

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 certificate

On successful completion, the end-point assessment organisation will apply to the Education and Skills Funding Agency (ESFA) for the apprenticeship certificate. The certificate is sent to the apprentice's employer.

2 Gateway

The line manager and training provider will review the apprentice's progress to see if they're ready to move on to EPA. If the apprentice has achieved the competency levels required against all learning outcomes, they can authorise the apprentice to start their EPA, or they will suggest a remedial plan if necessary.

3 End-point assessment (EPA): how apprentices demonstrate their learning

EPA is the final stage that an apprentice goes through to complete their apprenticeship. The apprentice must demonstrate their learning to an independent end-point assessor and the grades available are pass or fail.

Assessment events are:



Reflective discussion

A structured interview with the apprentice and independent end-point assessor to cover the broad range of knowledge, skills and behaviours from the detailed standard. It will explore:

- evidence submitted in the portfolio
- any aspects of the standard not evidenced in the portfolio
- how the apprentice has progressed in their role and their approach to work

The recording of the discussion is uploaded to our EPA portal, along with the portfolio, for final assessment by us.



Portfolio of work

Compiled during the EPA and from a range of evidence. The most appropriate types of evidence will be identified through discussion with the employer, training provider and apprentice, taking into account the job role and internal systems and processes.

At least three different types of evidence in the portfolio should demonstrate competence and authenticate the assessment. Examples include: written work or case studies, internal compliance audits, project work done in the role, formal performance review, appraisal or CPD log.

Our resources and tools that support end-point assessment

We are on the register of end-point assessment organisations and our EPA service includes support resource as well as flexibility around assessment delivery and a dedicated EPA team to support you.



EPA preparation tool

Online content to help the apprentice feel ready for their EPA experience. Personalised to their confidence levels and the standard, they're sent free access details once they're registered with us for EPA.



EPA team

Our dedicated EPA team is on hand to help with bookings and questions on anything from the assessment process to evidence portfolios.



EPA pack and guidance

Let our support, including short videos and how to guides help you get to grips and stay on track with the EPA process.



4 Apprenticeship certification

As well as receiving their Institute for Apprenticeships (IfA) apprenticeship certificate, the apprentice will receive a City & Guilds statement of achievement for end-point assessment.

Progression with City & Guilds Group

This apprenticeship is part of our wider offering in the sector and you can develop new and existing talent with ILM management apprenticeships including: Team Leader/ Supervisor Level 3; Operations/Departmental Manager Level 5; Chartered Manager Degree Level 6 and the Senior Leader Master's Degree Level 7.



Developed to meet the needs of employers and designed with input from an employer group including: Allianz, Aon, Aon Benfield, AVIVA, AXA, Bluefin, Catlin, Chaucer, Crawford & Company, Davies Group, Hiscox, Markel International, Marsh, Miller, RK Harrison and Zurich.

How our offer supports you:

Supportive payment structure

When you choose us for EPA you pay a small registration fee and the balance once the EPA has taken place and results submitted.

Personal support

Our Technical Advisors, Business Managers and Customer Service teams are on hand to help you with all aspects of apprenticeships.

Specialist online tools

Our e-Functional Skills can boost maths and English; Skills Zone develops workplace behaviours and skills; and our e-portfolio, Learning Assistant, lets you manage assignments and track the 20% off-the-job training requirement.

Events and webinars

We deliver a range of events and webinars run by industry specialists to advise and guide you, including regional networking and CPD events.

More information



If you're a City & Guilds centre, visit Walled Garden or contact your Business Manager to find out prices and if any elements are extra to the package. If you're a new customer, contact apprenticeships@cityandguilds.com to find out more.

Or visit cityandguilds.com/apprenticeships for full information on our apprenticeship products and services. Visit i-l-m.com/apprentice for information on management apprenticeships