



# Annual Report

Subject: Presidents Report

Version: 6

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Council Position: President

## Report Version 6 – 06/03/2022

### President's Correspondence

I have thoroughly enjoyed my time as President for the Insurance Institute of Norwich (IIN). Although 2021 was yet another year full of uncertainty, I am proud of the strength of our council during these times.

We provided a full programme of CPD events, totalling almost 52 hours CPD hours for our membership.

We haven't been able to provide the fundraising and networking opportunities we would have liked due the various lockdowns and restrictions, but we have lots of ideas ready to go for the year ahead which I am very much looking forward to.

The IIN has an amazing council of volunteers, some of our colleagues will be leaving the council this year and to them, I wish the best of luck and hope to see them back again in the future.

This does present us with an opportunity to welcome new members on to the council and I am pleased to see some new faces join, some joining from one of our biggest employers in the region.

My deputy April Stowers will be taking over the Presidency in April and has already been busy preparing for our Annual Dinner to be held in November which we are all excited about. I wish April the best of luck with her term as President, she has been on council now for a number of years and will bring with her some fresh ideas and energy to the role.

I will be remaining on council to advise and assist where possible as Vice President and look forward to seeing what's next for the IIN.

Thank you for all your support during my time as President.

Alycia Thomson  
IIN President



## Report Version 5 – 05/01/2022

### Matters arising from November council meeting

#### President's Correspondence

##### **Hazel Bowen**

Hazel will be stepping down from the IIN council as of January 2022, to coincide with stepping down from the role of Norfolk PFS Chair. Hazel will continue to be a member of the Norfolk PFS council and has agreed to be our point of contact between the two committees until a replacement PFS chairs has been appointed.

##### **Arron Coe**

Due to other commitments Arron has decided he will be stepping down from council with immediate effect. He has advised he'd like to return at some point in the future should things calm down with work and studies.

I'd like to take the opportunity to wish both Hazel and Arron all the best and thank them for their support on council.

##### **AGM Planning**

The AGM is schedule for April and will come around quickly, so we will be starting the preparations now. I have booked in a call with April and Sue in the next couple of weeks to get things started. You will be asked shortly if you wish to continue in your role on council or if you would like to try something new. We have a number of vacant roles so these will be sent around as well as it would be good to get these filled.

To find out more about any of the roles on council, please visit the Network Knowhow site as this has all the descriptions. As Council members you should all have access to NWK but let me know if you are struggling to login.



## Report version 4 – 06/10/2021

### Matters arising from August council meeting

#### President's Correspondence

#### **CII Member consultation - local institute feedback**

Following the CII's AGM in June 2021, the CII committed to conducting a member consultation and engagement initiative to consider all aspects of its offering.

The CII is now consulting with its members and other key stakeholders to:

- Refresh its strategy for the next five years, placing the evolution of its learning framework & membership proposition at its core
- Refine its role as a leader in delivering professionalism and public trust across the insurance and financial advice professions
- Ensure its governance structure is robust and fit for purpose and places its membership societies at the heart of the delivery of its refreshed strategy

As valued stakeholders, the RMM team is inviting all Local Institute Councils to contribute to this consultation. This can be via a specially convened Council meeting to take place during October/November or if we prefer, an extension to an existing Council meeting arranged during this period.

The meeting can be conducted virtually. A full briefing will be provided in advance, which will include key information and discussion points to cover in the meeting. The meeting should be minted, and the resulting documentation submitted to me for inclusion within the consultation.

I propose we hold this as an extension of our November council meeting.

Council to confirm this is agreeable.

#### **WORKING GROUPS: LI Communications / LI Grant payments**

Further to my emails to council over the last council weeks, the CII are looking for volunteers to sit on two working groups, looking at LI Communications and LI Grant Payments.

Members of the working groups will work collaboratively to review and analyse existing structures and systems and produce a set of recommendations for improvement and development.

It was our aim to have an IIN council member on at least one of the working groups to provide some insight and awareness on our behalf.

#### **November Council Meeting**

I wanted to get the council's view on returning to face to face meetings. We have received confirmation that meetings can be hosted on site at both Marsh and Aviva, however both have restrictions in place and guidelines to follow regarding COVID safety.



If we are to phase a return back, we could look to keep the virtual element for those not wishing to return just yet.

Alternatively, we could look to start meetings back again in 2022.

To be discuss in meeting.

### **Cambridge Dinner**

The Cambridge LI will be hosting their annual dinner on Friday 10<sup>th</sup> December, I have been invited and accepted. I think this is a good sign of events returning and we should certainly start discussing our 2022 dinner before the end of the year.



## Report version 3 – 18/08/2021

### Matters arising from July council meeting

#### **Sue Donmall – Secretary**

SD has agreed to take on the Secretary role following Sammi Bradshaw's departure, joining officially 6th September.

New secretary email address has been set up and will be circulated by AT.

AT to confirm SD's working availability

### President's Correspondence

#### **Member consultation engagement initiative**

CII are now looking at dates for the region to commence this initiative, expected Q4 2021.

AT to confirm with Julie Hicks in respect of date, people to be involved and whether any questions can be submitted in advance.

#### **Annual assessment**

AT confirmed the IIN passed the annual assessment, with considerable improvement on specific areas such as frequency and variation of CPD events.

It was recognised the council had attempted to arrange social events over the course of the last year so were not marked down.

AT to assessment details, it is expected IIN will qualify for the full grant available



## Report version 2 – 01/07/2021

### Matters arising from May council meeting

#### **Sammi Bradshaw**

Sammi has decided she will no longer be able to continue as our Secretary and will finishing her role with council on 12<sup>th</sup> July, this will give her time to tidy up any outstanding work and complete a proper hand over of her tasks.

I believe we will be able to manage without this support role in the short term however when face to face evens start again, we may need to look outside of the council for support in this area.

In the meantime, the secretary's main activities included:

- Collating and distributing meeting reports for council meetings
- Taking meeting minutes and distributing post council meeting
- Administering the secretary email inbox and responding to council and member queries
- Maintaining the event calendar to ensure updated with meetings, CPD and networking events
- Distributing messages to council
- Updating of the IIN website – eflyers, events, news posts and general admin
- Co-ordinating the AGM and submitting annual returns
- Event co-ordination including the annual dinner, CPD seminars and social events

Sammi was also our nominated membership secretary, this role will need to be replaced.

Discussion required as to how we proceed going forwards.

I'd like to take this opportunity to thank Sammi for her work over the last 3 years.



## President's Correspondence

**Digital Network Conference 2021** took place on 1<sup>st</sup> July, following the CII AGM on 30<sup>th</sup> June.

April and I attended the virtual event programme including breakout sessions with the other local institute reps to discuss challenges faced by LIs and sharing best practice.

A summary of the day has been issued as a separate report, this is well worth a read as it gives some good insights into our membership and engagement going forwards. You should have also received an email from central CII containing the slides which do contain some interesting information.

I would like the IIN to investigate some of the best practice initiatives used by other institutes including:

- Prize giving ceremony for 2020-2021 achievers
- Topic weeks – focussed CPD weeks centred around particular topics. Sessions held once a day Monday to Friday, shorter CPD sessions of around 30 -45 mins. Could also work for our wellbeing initiative.
- Engagement – campaign to remind people to update their preferences
- Charity challenge month – similar to our November challenge last year, I was thinking September?

### **Run Talk Run**

Our first wellbeing initiative has started with a partnership with Run Talk Run, a 5km run takes place every Wednesday in Norwich encouraging members to come along and run at a chatting pace to discuss whatever is on your mind or simply meet some new people.

There was a good turn out to the first IIN supported run on 16<sup>th</sup> June, Sharon and I were there to represent the council and I thoroughly enjoyed it, even in the heat!

Although I won't be able to make it every Wednesday, I will certainly be committing to as many as possible and as a council I would like us to continue to promote the event.

### **Diploma Sponsorship Update**

The initiative launched on 1<sup>st</sup> June, and we have already received several applications. This being promoted on our online platforms as well as communications being distributed to local schools. If you know of anyone this might be of interest to please encourage them to apply, applications are open until 31<sup>st</sup> July.

I will try to catch up with Hazel next week to get a full progress update.



## Report version 1 – 20/05/2021

### Matters arising from March council meeting

#### **Diploma Sponsorship**

As agreed, the IIN will be sponsoring a diploma candidate this year along with the PFS, who will be sponsoring their second candidate after the success of the 2020 initiative.

The average cost to the institute over the three-year period is as follows:

Year 1	£725.00
Year 2	£727.00
Year 3	£727.00
<b>Total</b>	<b>£2,179.00</b>

This is the cost of an annual membership and the examination costs to achieve a Diploma in General Insurance. The candidate may complete the qualification in a shorter period, and this has been taken into consideration when looking at the budget.

Hazel and I are in the process of organising the relevant marketing material and will be looking to launch the initiative in the first week of June. Key dates in the process are:

- > 1st June – applications go live
  - Contact schools / colleges / universities to promote the opportunities
  - Put adverts in local papers/magazines
  - Circulate through all other channels identified, such as job centre, WI, golf club, radio, etc.
- > 31st July – applications close
- > 1st to 7th August – committees review the applications and book interviews
- > 8th to 14th August – Zoom interviews conducted
- > 15th August – sponsorships awarded
- > 1st September – candidates are enrolled

There will be some opportunities for council members to get involved with the process for example, assisting to promote the initiative:

- > Assist with promoting the initiative
- > Be part of the selection and interview committee
- > Mentoring and council support once successful candidate enrolls

Please let me know if anyone is interested in assisting, please let me know by 1<sup>st</sup> June.

### President's Correspondence

#### **Digital Network Conference 2021**

Invitations issued at the beginning of May.

This two-day conference will take place on **Wednesday 30th June 2021 and Thursday 1st July 2021** across Microsoft Teams and our online webinar platform, ON24.

All institute members will be welcome to join on Day one, Wednesday 30<sup>th</sup> June, this will also include the AGM taking place at 3pm that day.





The Insurance  
Institute of Norwich  
Chartered Insurance Institute



Day two, Thursday 1<sup>st</sup> July, will be for two delegates of each local institute.

If you wish to sign up for day one of the conference, please do so by 5pm on 11<sup>th</sup> June 2021.

Email invitation to be provided for those that have not received it.

### **Officer reporting process – new format**

I will be introducing a new format for the officer report to make the reporting format standardised. The timeframes for submitting reports will also be changed to allow for reports to be collected and distributed at least 2 weeks prior to the council meeting. This will ensure reports are read and digested before the meeting. The meeting will then be an opportunity to raise queries on the report contents and also for officers to provide updates since submission.

I will be sending an email to all officers detailing the changes following today's meeting. This is very much a trial process. Please let me have your feedback following the first month of using this new format and we can adjust where necessary.

The overall goal of the change is to make the reporting process more efficient. The time we spend in meetings is valuable and we all want to make sure it is put to good use.