

The Insurance Institute of Manchester



**Annual General Meeting
Thursday 23rd April 2020**

Annual Report 2019–2020



**The Insurance
Institute of
Manchester**

Chartered Insurance Institute

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General information

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Programme

- Welcome
President's address
AGM formalities
Incoming President's goals and objectives for 2020/2021



One hour of continuing professional development can be claimed for this event if relevant to your learning and development needs

144th Annual General Meeting of the Insurance Institute of Manchester 2020

This year's AGM is to be held via an online platform due to the current situation involving COVID-19.

All Council nominations are listed below and will be approved at the AGM. Please contact the office 14 days prior to the AGM if you would like to make an objection(s) to any of the points or to request a copy of the 2019 minutes. These are also available to view on the IIM website at www.cii.co.uk/manchester

The existing Council recommends that members vote in favour of all the resolutions being proposed at the AGM, which they consider to be in the best interests of the institute as a whole.

The proposed President of the Institute for 2020/2021 is Eleanor Moore of C&C Insurance Brokers

The proposed Deputy President of the Institute for 2020/2021 is Jessica Heaton of Zurich Insurance

To receive and adopt the Treasurer's Report and Accounts for 2019

To receive and adopt the Annual Report of Council for 2019/2020

To elect the following Vice-Presidents for the session 2020/2021

Under rule 11a): Stephen Bridge, Suchit Desai, Victoria Royle

Under rule 11b): Fintan Griffin

To elect the following ex-officio members of the Council for the session 2020/2021

Secretary: Danielle Gowrie, Protector Insurance

Treasurer: Katie Jackson, Griffiths & Armour

Committee Chairperson(s) & Representatives:

CPD: Paul Hudson, Aviva

Education Secretary: Mark Farrant, McLarens

Exam Co-Ordinator: Mark Farrant, McLarens

Dinner Secretary: Caroline Griffiths-Davies, Dual Corporate Risks

Events: Emma Longstaff, Davies Group

Diversity Officer: Karen Shenton, Create Solutions Ltd

Governance: Paul Heathcote, Marsh

Regional Forum Officer: Jessica Heaton, Zurich Insurance

Constitution Officer: Mike Cranny, Create Solutions Ltd

Style in the City Chair: Sandra McDonald, McLarens

Liaison Officer: Victoria Royle, Zurich Insurance

To re-elect the following Council members (not in named positions) for the session 2020/2021
Brad Jackson, Craig Stokes, Dina Railean, Jenny To, Marc Hargreaves, Stephen Lowe, Stuart Frost

To appoint BDO LLP Accountants for the session 2020/2021

Appoint a Charities Representative: Tracey Threlfall, Aon

Local Institute Council and Officers 2019-2020

President:	Victoria Royle
Deputy President:	Eleanor Moore
Vice Presidents 11a:	Katie Jackson Stephen Bridge Suchit Desai
Vice Presidents 11b:	Fintan Griffin
Secretary:	Jordan Haskayne
Treasurer:	Katie Jackson
Governance Chair:	Paul Heathcote
Education Secretary:	Mark Farrant
Exam Co-Ordinator:	Eleanor Scott
CPD Committee Chair:	Paul Hudson
Dinner Secretary:	Caroline Griffiths-Davies
Events Committee Chair:	Danielle Gowrie
Regional Forum Officer:	Stuart Frost
Charities Representative:	Tracey Threlfall
Liaison Officer:	Suchit Desai
Constitution Officer:	Mike Cranny
Elected Members April 2019:	Brad Jackson, Dina Railean, Jenny To, Karen Shenton, Marc Hargreaves, Stephen Lowe



PRESIDENT'S ANNUAL REVIEW 2019-2020 VICTORIA ROYLE ACII, PRESIDENT



Well what a year it has been and continues to be! I didn't think we would be where we are now 12 months ago! It has been a pleasure to be the President of the Insurance Institute of Manchester during the 2019-2020 term of office. I would firstly like to thank Suchit Desai who put the trust in me, to be his Deputy President and for all his hard work in his year.

I have enjoyed so many events, which the dedicated volunteers of the Insurance Institute of Manchester work hard to put on for us all, from the launch of the Leadership Programme at the beginning of the year, to the Jubilee Prize Award event, to watching our models strut their stuff on the catwalk at Style in the City! Manchester is such a forward-thinking social institute which I am proud to be part of.

The CPD committee have worked hard all year to bring us lots of CPD lectures, I would like to thank Paul Hudson (Chair of CPD) for his quick response during this pandemic, in providing Webinar based learning on 'Does my BI policy cover Covid-19?' with Alan Chandler, the course was so well attended that it was booked up in the first 10 minutes of the details hitting our website.

The Education and Development committee have worked with ITP to get our Fast Track Diploma course up and running and 13 candidates are now on their way with their studying. We have 10 candidates on their way to completing their ACII too, again with the help of ITP. The Jubilee prize award event in May of last year was a success, this was held at Manchester Art Gallery and we heard from the inspiring speaker, Joe Thompson.

The Events committee have worked hard throughout the year to make sure we have had plenty of chances to network and socialise with our associates all over Manchester's insurance network, from the summer BBQ, the well-attended Young Members Ball and the Annual Quiz, thank you to all those who have made each event a success.

Style and the City I am sure you will all agree was a brilliant day full of fun and laughter, with our industry models showing us the best wears of Barnardo's clothing range (you were all brilliant on that cat walk), thank you to all the committee and also to Tracey Threlfall who was our amazing host on the day.

My employer Zurich have been fantastic in supporting me throughout the year, from being the main sponsor at the Manchester Institute dinner, supporting me attending the many dinners I have been to and allowing me to perform my presidential duties daily, thank you!

I am proud to say we have raised £6660.10 for the National Autistic Society and thank you to all of you who gave so generously.

Thank you to my Council who have supported me throughout the year, to our Regional Membership Executive, CII Karen Fothergill who supports us and I wish every luck to Eleanor Moore in her year as President, you will do a brilliant Job I am sure and also to her Deputy President Jessica Heaton!

The IIM is only successful because of the amount of time, passion and dedication our volunteers bring to the table and I would like to thank you all for the support you have provided me throughout my year; for delivering great events and CPD for our members, for creating new innovative projects such as the WIMIN mentoring scheme but also to the people who are behind the scenes such as our Treasurer Katie Jackson who makes sure we are ticking along smoothly throughout the year!

SECRETARY'S REPORT

JORDAN HASKAYNE DIP CII



The primary functions of the institute are to ensure its members can access a variety of CPD lectures, be able to take their insurance exams in a professional city centre venue, and to host an Annual Dinner. The committee members have worked tirelessly all year to deliver these things and much more and this is a credit to all those who volunteer their time to assist.

Mark Farrant has enjoyed a triumphant first term as chair of the joint Education & Development Committee. Mark and the committee have worked hard to assist IIM members in completing their insurance exams by running the twice-yearly examination sessions. From finding easily accessible city centre venues to ensuring the examinations on the day run smoothly, the committee work tirelessly to assist all of our members in their career progression. The committee also organised a successful Jubilee Prize Award ceremony in May. The event rewards individuals who have produced excellent examination results and is a testament to the successes of both the Education Committee and our Institute members.

Paul Hudson has chaired the CPD Committee for the past twelve months. Throughout the year, Paul and the committee have worked hard to deliver a programme of industry relevant lectures. By working in partnership with the Manchester Liability Society, led by John Lindsay, the committee have produced over 50 hours of structured CPD learning. One of the highlights of the year was the full day Mock Trial which was held in conjunction with Clyde & Co. The committee have also started trialling webinars including 'BI Insurance and Covid-19' and new breakfast CPD sessions. I am proud to be a member of the CPD Committee and I appreciate that a lot of time and effort goes into organising each event.

The Annual Dinner was held at the Mercure hotel back in November following a last-minute change of plan. The Committee worked incredibly hard to find a new location at such short notice and the black-tie event was a success as it brought members from across the industry together for a night of food, drink and celebrations. With entertainment from both comedian Tiff Stevenson and DJ Disco Dave, the annual event was a triumph.

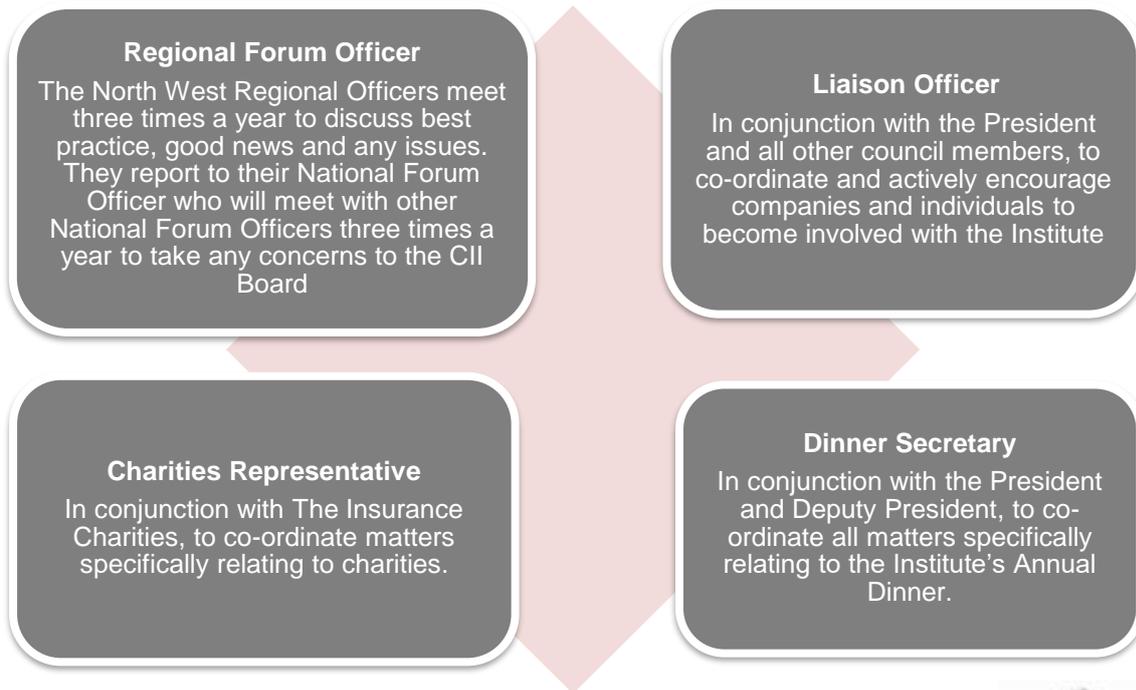
The Events Committee have also had a wonderful twelve months hosting a number of successful activities. The committee, led by Danielle Gowrie, have worked hard to organise activities which engage both existing and new members alike. From quiz nights to comedy nights, there has been an event for everyone to attend and the committee should be proud of all they have accomplished.

The Women In Manchester Insurance Network, chaired by Jessica Heaton, has gone from strength to strength this year. In October, WIMIN launched their first Mentoring Scheme which included a 5-topic programme to bring together industry leaders, future leaders and rising stars to focus on personal development.

One of the highlights of the year was the Style in the City event hosted in the Midland Hotel. For the ninth year running, guests from the insurance and financial services industry attended the glamorous afternoon celebrating the 'My Fair Lady' themed event. The day was a huge success with a substantial amount of money raised for the President's charity Barnardo's. Special thanks have to go to the members of this additional committee for their hard work and considerable fundraising efforts.

At this AGM I will be stepping down from my role as Secretary. I just want to give a special note of thanks to everyone who has provided me with the support I have needed to carry out this role over the past 3 years. It has been a pleasure to volunteer for the IIM and I wish both the Council and Eleanor Moore all the best for the upcoming year.

Council Members with Special Responsibilities



MANCHESTER REGIONAL FORUM OFFICER STUART FROST



Local institute members require a representative of their institute to represent them at a national level to ensure that the interests of both their local institute, and they themselves are protected. We meet regularly throughout the year at a North West Regional meeting to discuss best practice, new initiatives and any issues raised. Our North West National Forum Officer will then then report at a national level.

By attending these meetings, I have learnt that Manchester is an exceptionally well-run institute and well governed to ensure the huge amount of work that is undertaken continues successfully.



LIAISON OFFICER'S REPORT SUCHIT DESAI ACII

The Liaison Officer provides an important link for new people to get involved with the IIM. It's always great to receive contact from somebody who is keen to get involved!

I am pleased to report that I have been kept busy as I have seen 11 people in the last year and following an informal discussion, I have linked them into their preferred Committee. It's been excellent to see people that have previously been involved with The New Class and Fast Track CII Programme and also some ex-members coming back to offer their assistance. The Committees are the lifeblood of the IIM and the fact that we have so many willing volunteers in Manchester means we are in good shape.

If anybody wants to meet with me for an informal discussion, then please contact The IIM Office and Karen Fothergill, Regional Membership Executive will put you in touch!
Wishing Eleanor, a fantastic year as President!

CHARITIES REPRESENTATIVE'S REPORT

TRACEY THRELFALL



This has been my first full year as the Insurance Institute of Manchester Charities Representative, and I have thoroughly enjoyed the variety that this role has brought me, along with the opportunity to share with my fellow council members the importance of what the Insurance Charities does and how I see this impacting our members at a local level.

The Insurance Charities is a charity for the UK and Irish insurance profession, providing support for current and former insurance employees and their dependants since 1902. They give over £1million of help each year to insurance people in need.

Manchester is one of the larger regions, and therefore it is important to keep raising awareness across the various businesses based here in the city and surrounding areas, and this is an important part of the role. Manchester has equally benefitted greatly from the fund over the years. I was delighted that this financial year Manchester was able to donate £1000 to the Insurance Charities.

To qualify, a recipient needs to have worked for five years in insurance and be in need of financial assistance. An applicant does not need to be a CII member to apply for help.

During the year the Insurance Charities have continued to support people with Dementia and have also continued to promote their 'Domestic Violence' Toolkit to help and support people and employers dealing with such situations. For more information please check out their website.

This year the Insurance Charities awareness week will take place between the 22-26 June, albeit we are yet to hear how this might be impacted by the Covid-19 outbreak. However due to this pandemic now more than ever the charity needs our support to help others during this challenging time.

You can help by sharing the online posts on both LinkedIn and Twitter and can use the #ICAW in the lead up to the awareness week.

If you would like any further information then please check out the website www.theinsurancecharities.org.uk where you can find out more about the charities and work they do as well as get involved.

If you are aware of any person in need of help and support and you think the Insurance Charities can help, then please do not hesitate to contact me via the Manchester Institute.

Money raised for Charity in 2019-2020

**The Insurance Charities
£1000**

**Presidents Chosen
Charity, The National
Autistic Society £6660.10**

**Style in the City Charity,
Barnardos £4981.11**



DINNER SECRETARY'S REPORT CAROLINE GRIFFITHS-DAVIES



The 2019 Annual Dinner was held on Friday 8th November at The Mercure Hotel. It was well attended with around 530 guests from our profession.

Normally held at the Principal Hotel, we were unfortunately informed that we would not be able to hold it there due to a problem with the stage structure collapsing causing a health and safety issue. With six weeks' notice and with some help and guidance we managed to secure a city centre location to still be able to go ahead with our biggest event of the year. I would like to take this opportunity to thank our suppliers, the Principal and the Mercure hotel for a smooth transition from one hotel to another. There were some challenges to overcome but felt in the time given and the feedback received we were still able to provide a spectacular evening of entertainment and a great time by all.

We kept the room layout from previous few years as we all felt the familiarity of having the president's table the middle of the room would work best and gave a great focal point to the room. Here our comedian Tiff Stevenson performed her set and we heard from CII Representative Mellissa Collett, Professional Standards Director about her time with the CII and recent events in Manchester.

The theme was Masked Ball and it didn't fail to give a glamorous feel to the evening. The room was set with masks on the tables and decorated with feathers and sequins which enticed guests to join in the spirit of the event. There was some fantastic efforts and some entertaining pictures to remember.

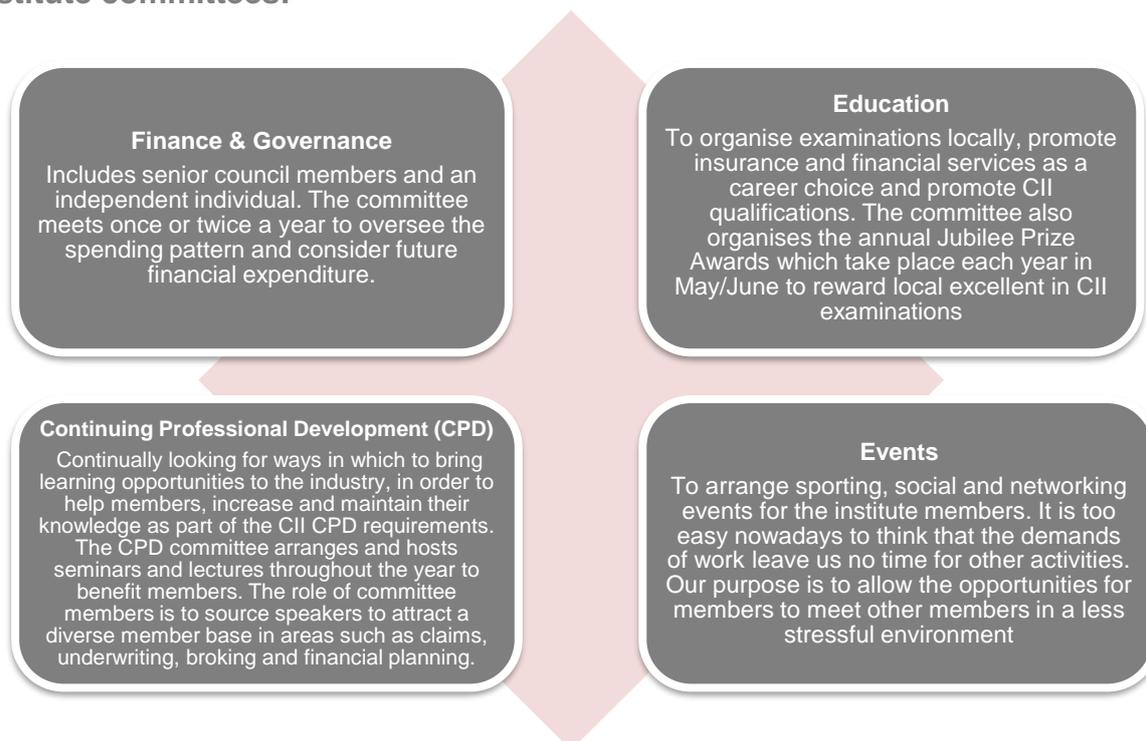
We heard from our President, Victoria Royle about her year and the activities the institute had achieved in the last 12 months and an engaging speech from George Stanbury, representing her chosen charity The National Autistic Society. The profit and money raised in the envelopes from the evening will go to this worthy cause.

Our technical assistance was once again provided by Sterling AV who did a fantastic job. We also worked with Giraffe who provided all of the table linen and additional props and decoration for the evening. The fun Photo Mirror was supplied by Cheshire Celebrations. Entertainment of a singer and saxophonist was from UTC Events and we finished on the dancefloor with DJ Disco Dave.

We are also hugely grateful to all our sponsors; Great American Insurance, Manchester Underwriting Management, Ensurance, NFU Mutual, QBE, Dual Corporate Risks, Weightmans, Criterion and Kempster Bowers along with the additional companies that donated prizes for our raffle on the evening. Our main sponsor for the evening was Zurich.

The event could not have happened without the amazing support from our RME Karen Fothergill in the IIM office, Natasha Johnstone and Emma Longstaff who I am very grateful for their assistance before and during the event.

Institute committees:



TREASURER'S REPORT

KATIE JACKSON ACII

FINANCIAL PERIOD 1ST JANUARY – 31ST DECEMBER 2019



Accountant's Report to The Insurance Institute of Manchester

We have examined the books, accounts and documents presented to us of Insurance Institute of Manchester for the year ending 31st December 2019 and confirm the annexed Balance Sheet and Income and Expenditure account are in accordance therewith.

BDO LLP
Central Square
29 Wellington Street
Leeds
LS1 4DL

At the time of the Annual Report being published we are awaiting verification from the accountants and this final report will be submitted in time for the Annual Returns CII deadline of 31st May 2020.

The following page show our Profit & Loss figures and Balance sheet for this period.

Profit and Loss**The Insurance Institute of Manchester
1 January 2019 to 31 December 2019**

	31 Dec 19	31 Dec 18
Income		
CII Recharge	£650.25	£120.00
General Grant	£66,722.50	£72,001.50
Other Revenue	£8,866.00	£8,692.32
Social & Charitable Event Income	£104,990.10	£93,349.50
Sponsorship (Not Social, Charitable)	£4,950.00	£4,000.00
Total Income	£186,178.85	£178,163.32
Less Cost of Sales		
CPD Event Expenses	£25,171.64	£22,886.00
Education Expenses	£4,375.00	£6,400.89
Insurance Charities	£1,000.00	£0.00
Invigilation Expenses	£650.25	£701.40
Social & Charity Event Expenses	£99,233.95	£95,721.10
Total Cost of Sales	£130,430.84	£125,709.39
Gross Profit	£55,748.01	£52,453.93
Less Operating Expenses		
Accountancy fees	£0.00	£900.00
Advertising & Marketing	£3,372.88	£6,620.14
Bank Fees	£32.00	£32.00
Charitable Donations	£3,621.00	£9,502.81
Cleaning	£0.00	£9.15
Entertaining	£2,197.58	£2,191.27
Hotel Expenses	£2,470.19	£1,468.23
Insurance	£2,786.77	£2,716.40
IT & Software	£300.16	£316.80
Meeting Room Rental	£687.90	£3,747.90
Miscellaneous Expenses	£1,288.81	-£111.49
Postage, Freight & Courier	£57.74	£396.29
Printing and Design	£763.40	£203.73
Professional Fees	£35.00	£97.40
Refreshments	£3,656.50	£1,197.49
Rent	£3,182.40	£9,703.20
Stationery	£155.13	£735.55
Telephone & Internet	£69.48	£433.98
Travel - International	£490.80	£506.54
Travel - National	£346.19	£1,121.10
Total Operating Expenses	£25,513.93	£41,788.49
Net Profit	£30,234.08	£10,665.44

Balance Sheet**The Insurance Institute of Manchester
As at 31 December 2019**

Account	31 Dec 2019	31 Dec 2018
Current Assets		
Cash at bank and in hand		
IIM (Debit Card)	879.23	2,284.73
Main Institute Account	118,380.47	80,005.89
Total Cash at bank and in hand	119,259.70	82,290.62
Accounts Receivable	2,315.00	9,050.00
Prepayments	410.00	410.00
Total Current Assets	121,984.70	91,750.62
Creditors: amounts falling due within one year		
Accounts Payable	464.52	464.52
Accruals	10,986.90	10,986.90
Total Creditors: amounts falling due within one year	11,451.42	11,451.42
Net Current Assets (Liabilities)	110,533.28	80,299.20
Total Assets less Current Liabilities	110,533.28	80,299.20
Net Assets	110,533.28	80,299.20
Capital and Reserves		
Current Year Earnings	30,234.08	10,665.44
Reserves	30,516.20	30,516.20
Retained Earnings	49,783.00	39,117.56
Total Capital and Reserves	110,533.28	80,299.20

Being treasurer of such a busy institute is a huge responsibility and involves a lot of work to keep up to date, in addition to my day job. I feel well supported by my fellow Governance Committee members who ensure that good practices and procedures are in place to ensure our members money is spent appropriately.

I work closely with the institute office to ensure all invoices are paid promptly, but also make sure we do the same for our suppliers. This involves engagement across all institute committees to make sure they work to the budgets assigned to them, obtain best value for money and ensure formal contracts are in place where needed.

Not only do we have a healthy bank balance bolstered by the grant provided by the CII, but we run 3 large dinners each year that turnover around £100,000, offer many smaller sporting and social events in addition to the CPD and educational programmes. Our varied programme is a credit to the hard work put in by committee members who give up their time voluntarily.

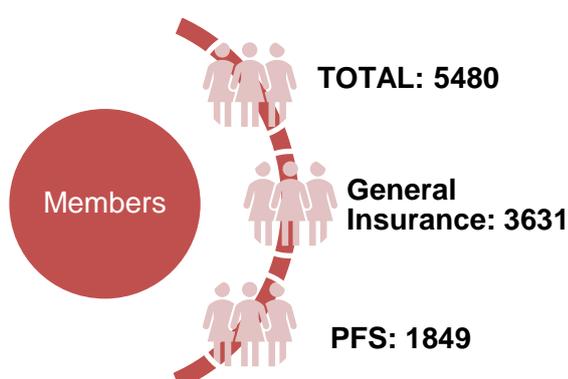
The Institute bank account balance remains high levels of reserves and the plan during 2020 & onwards is to offer more educational and CPD courses to our members than ever before to ensure they continue to receive good value for their fees.

We continue to donate the money raised at social events to good causes, including the President's choice of charity; "The National Autistic Society" and "The Insurance Charities". All our social events make a profit, which is a credit to our members who donate so generously.

This year we have consulted with a specialist firm of independent accountants who specialise in advising charitable organisations to ensure that we are complying with all relevant tax legislation.

I am happy to report that despite some initial concerns over whether we should be paying VAT, it has been clarified we don't need to due to the proceeds of social events being donated to charity and our remaining income being given in the form of a grant designated for educational purposes.

Overall, I am happy to report that the Insurance Institute of Manchester bank account has substantial reserves and can more than adequately meet all on-going financial commitments during this lock-down period, whilst continuing to offer CPD and Educational events.



Governance Committee Members: Paul Heathcote (Chair), Stephen Bridge, Suchit Desai, Victoria Myers, Eleanor Moore, Jess Heaton Fintan Griffin and Katie Jackson.

EDUCATION & DEVELOPMENT COMMITTEE REPORT

MARK FARRANT ACILA, EDUCATION SECRETARY



The Education and Development committee consists of ten members. Thank you to you all for the help and support you have provided over the last year. The members are as follows; Rebecca Vidler deputises the committee and will be taking over as Chair at next year's AGM. Thank you for all your support throughout this year. Eleanor Scott and Stuart Beech who have been responsible for organising this year's exams. Thanks to Ryan Conroy for another fantastic job in arranging the Leadership program which was a great success. I would like to thank all of the committee members for their support this year in achieving our goals and also all of our invigilators, without their continued support our initiatives for further development could not happen.

Exam Centres

The local institutes help and support our members to progress through their qualifications by providing local venues where twice a year they can sit their written exams. From 2020, this will now be organised centrally by the CII, but the local institute will be on hand if assistance is required.

Jubilee Prize Awards 2019

The annual Jubilee Prize Award event was one of the highlights of the year for the committee, we organised the event at Manchester's Art Gallery. We had a speech by Ewart Hodge who was on the committee at the time and organised a great event and also from Joe Thomson, ex professional footballer who has suffered from cancer twice and was able to share his story with the group, which was really inspirational and motivating.

The award ceremony is to celebrate the outstanding success of the prize winners who gained the highest scores in the CII examinations. Congratulations once again to the winners of 2019 and thank you again to the sponsors listed below. The 2020 event this year has been postponed due to the COVID-19 restrictions, but we are keen to continue celebrating the success of this year's prize winners and will be working to arrange something.



Award	Winner	Sponsor
Best Cert CII performance	Peter Brookes, BUPA	Buckland Harvester
Insurance Law	Thomas Frain, Crawford & Co	ITP
Insurance Broking Law	Hazel Somerville, Towergate	Bridge Insurance Brokers
Claims Practice	Lee Fitzsimons, Towergate	Sedgwick
Insurance Business and Finance	Andrew Connolly, NFU Mutual	Crawford & Company
Liability Insurances	Beth-Louise Newton, CNA Hardy	McParland Finn
Underwriting Practice	Michael Gough, RSA	Bollington
Commercial Property and Business Interruption	Matthew Ward, Allianz	Chubb
Best Dip CII performance	Andrew Connolly, NFU Mutual	Ecclesiastical
Advanced Claims	Janet Agoston-Jones, Aviva	Kempster Bowers
Risk Management in insurance	Mubarak Khonat, Reich Insurance	Allianz
Youngest ACII completion	Daniel Taylor	Aviva
Best ACII completion	Leon Hood, Quote Line Direct	IIM Jubilee Prize Fund



School and Universities – Discover Risk!

The committee continues to promote the Manchester insurance market and insurance in general through assisting with careers fairs and building relationships with local schools and colleges. This year we have attended sessions in school to promote a career in insurance by use of the Discover risk game which is an interactive session with College and school children to help them understand the great work we do in the insurance industry. We continue to work with local schools and look for new opportunities to promote the Insurance Industry as a career for school leavers.

Fast Track Programmes

Following our previous success, we have run the Fast Track ACII course again which is currently ongoing with ten successful candidates. Their course specifically designed to help pass their Advanced Diploma (ACII) qualification in 2 years.

We reviewed member requests and data and decided it would be beneficial to also offer a Fast Track programme to achieve the Diploma (Dip CII) qualification. The IIM teamed up again with Insurance Training Partnership (ITP) to offer this type of support including regular workshops and one to one training. This programme was launched in January 2020 with 13 successful candidates listed below. We wish them every success in their studies.

Fast Track ACII

Name	Company
Alfred Sherwin	Champion Insurance Brokers
Amanda Stephenson	Towergate
Chris Riley	Arista
Craig Wilson	Stanmore Insurance Brokers
Debbie Humphries	Finch Insurance Brokers
Jenny Hyde	Stanmore Insurance Brokers
Lee Fitzsimons	Towergate
Philip Cruickshank	Chubb
Shanna Renaud	Towergate
Joe Hepplewhite	Zurich



Fast Track Diploma

Name	Company
Chris Rawlinson	Bridge Insurance
Hannah Cokayne	Allianz
Jonathan Green	Caunce O'Hara
Mark Webster	McLarens
Melanie Heignbotham	HSB
Melissa Savage	Ripe Thinking
Omar Akram	TEn Insurance
Paul Hudson	Aviva
Rebecca Morris	Zurich
Russell Moore	Zurich
Thomas Trencher	Zurich
Tom Rolph	Allianz
Yvonne White	Bridge Insurance



The Leadership Programme

The Leadership Programme 2019, sponsored by Catalyst Claims, started in April with a launch session in Manchester to give the candidates chance to meet, learn about the course, and carry out some speed networking.



The new candidates, motivated and eager to learn were provided with an overview from Ryan Conroy who arranged the course and were provided with a talk on social media networking from Melissa Collett, CII Professional Standards Director.

The course ran with great success, covering the following areas:

- Networking, social media and self-brand
- Five Communication habits of highly effective leaders
- Time Management
- Presentation Skills
- Speak to the Market Leaders
- Show Time!

The groups wrapped up the course giving a presentation on 'Who makes a good Leader & Why', along with a presentation and drinks ceremony to congratulate everyone for their efforts.

A huge thank you to Ryan Conroy for his exceptional work in organising such a great course.

The candidates who successfully completed the course were:

Name	Company
Aidan Bennett	Mottram Financial Services
Daniel Hoyles	TEn Insurance
Helena Fagan	Zurich Private Clients
Hokey Chik	CNA Hardy
Jade Soanes	Frenkel Topping
Jaspri Sihra	Chubb Insurance
Kirsty Warman	Broker Direct
Laura Caunce	Broker Direct
Laruen Elliott	Broker Direct
Natalie Wood	Co-op Insurance
Nicola Hague	Allianz
Oster Kambarami	Zurich Insurance
Sam Baxter	Allianz

The leadership programme is for people relatively new in the insurance market who may see leadership in their careers at some point in the future, it is a great opportunity for members to meet current leaders in our Market, to network, gain presentation skills and much more. We are currently working on developing this programme and hope to launch when able to.

A special thank you to Karen Fothergill, Regional Membership Executive who supports and assists with the organisation all our events throughout the year.

Committee members: Rebecca Vidler (Deputy Chair), Andrew Gray, Brad Jackson, Dina Railean, Eleanor Scott, Hokey Chik, Jenny To, Matthew Tattler, Ryan Conroy, Sam Baxter, Stuart Beech

CPD COMMITTEE REPORT

PAUL HUDSON CERT CII



During 2019/20 we have been able to deliver well over 100 hours CPD to our membership through a variety of means. I've been proud to lead the team that has helped me in delivering this and continuing to work closely with the Manchester Liability Association and the Manchester Claims Association also.

This year has also seen the CPD committee forge closer relationships with local BIBA representation in Bethan Perris and John Batty and Craig Stokes for PFS is a very welcome addition to the committee and all really enables us to consider the needs of the wider insurance community in Manchester and collaborate on events together.

This has allowed us to try and present as comprehensive a schedule of events and topics as possible to ensure the Manchester insurance market is one of the most informed and up to date in the country.

Other key pieces of CPD this year have been revision sessions for some of the cornerstone exams of the CII qualifications and M05 and M92 lectures were fully booked out. Plans are in place to support our PFS members through some critical exams later in the year. COVID-19 has presented both an issue, with us cancelling several intended face-to-face lectures, and an opportunity, where we have moved quickly to secure topical speakers to operate via webinar. This has allowed us as a committee and institute to explore new ways of learning and will hopefully form part of the curriculum going forwards once life returns to more normality. I'd imagine our industry may embrace the new ways of working and digital CPD will become more popular as a delivery method of development and learning in future years.

Finally, I'd like to just express my thanks to all committee members, present, old and new. Thanks, in particular go to Karen Fothergill for her exceptional support in organising our CPD program and working with venues and speakers alike to ensure its smooth running. I look forward to continuing in position as Chair for another year and to developing our program further which includes (COVID-19 pending) our inaugural September CPD Conference event in association with BIBA and their tour of the region. It's sure to be a landmark event for the insurance industry in Manchester if it goes ahead.

Topics this year have been wide and varied; One of the highlights was a full day mock trial in October ran by Clyde & Co. A selection of other subjects included Construction, High tech threats, Escape of Water and the inevitable Brexit. We have also tried to consider non-technical subjects also to ensure we cater for as much of the varied development needs of our membership as possible.

Committee members: Marc Hargreaves (Deputy Chair), John Lindsay (MLS), Andrew Hope, Bethan Perris, Craig Stokes, Daniela McDonough, Dina Railean, Greg Wakeling, Jessica Heaton, Jordan Haskayne, Lynn Wigfield, Michelle Haigh, Samantha Wright, Stephen Lowe

STYLE IN THE CITY REPORT NATASHA JOHNSTONE



The 2019 Style in the City event was held on Friday 21st June at The Midland Hotel with a My Fair Lady Theme. Another year running it was a sell-out event once again with over 350 guests from our industry. This year's format was a change from all other previous events where we showcased upcycling and recycling of owned or preowned outfits. The guests did not disappoint and joined in with the theme.

The outfits for the fashion show were sourced from the President's chosen charity for this specific event, Barnardo's. A full range of themes were gathered from the charities stores with the outfits expertly styled by the marvellous celebrity stylist and choreographer Jillian Pollitt!

We say a special thank you to our Gold Sponsors; AIG, Polygon, QBE and Touchstone Underwriting and to our Silver Sponsors Close Brothers Premium Finance, McLarens, Weightmans, Sedgwick and Compass.

The Presidents Table hosted special guests from the charity, along with personal guests of Victoria. A prosecco reception was held, and lunch was provided as a three-course set menu.

Our host for the afternoon was Tracey Threlfall, who entertained the guests superbly and commanded control of the room with ease. Our catwalk show was again choreographed this year by one of the fashion world's best, Jillian Pollitt. With a change to format this year all models were Industry professionals and special thanks goes to Callum Barlow, Eleanor Moore, Emma Longstaff, Marc Hargreaves, Stuart Beech and Vicky Swinburne.

The catwalk show was then followed by DJ Dave to dance the afternoon away before heading to Revs De Cuba for the organised after party! Special thanks to Sterling AV for their professional technical assistance, Michael John Hairdressing and Cassie Lomax (make-up). The feedback received for the event was excellent, particularly on the change to the industry models. We raised a massive £4,900 for the charity which I believe is a record amount for this event and I thank all those who donated.

Plans for the 2020 Style in the City event are on hold following these unprecedented times of COVID-19 I know that Sandra McDonald, incoming Chair and her team will put on a fabulous show.

A massive thank you to our current president Victoria for her input into the Style in the City event and to the committee for helping with arrangements. Also, to Karen Fothergill in the IIM office, thank you for your continued support, we are very grateful for her help and support.

On a final note, as I move on from the Manchester insurance region, I thank the committee and the council and members for support and collaboration on SITC, Events, Annual Dinner and YMB committees and making this a great Institute and Council to be part of.



EVENTS COMMITTEE REPORT DANIELLE GOWRIE ACII

Young Members Ball

In September we held our fourth Young Members Ball, which is now one of our larger events in the annual calendar. This year we were at The Lowry Hotel.

The Young Members Ball is a great opportunity to allow younger and less experienced members of the industry to attend a black-tie dinner, learning the etiquette and format to prepare them for attendance at other Annual Dinners in future years.

This year's event had the best attendance to date, and we hope this event will continue to grow in the coming years.



This year was another great year for the events committee, maintaining our well-established events all of which help raise a fantastic amount for charity.

In June we held our annual football tournament, which was a cold and wet afternoon, but as always the teams arrived in fighting spirits, with an Allianz v Chubb, and Chubb being crowned the champions of this year's league. We also held, our now annual, Summer BBQ in July at Rain Bar. This was a great event with good attendance and delicious food, raising a great amount in the charity raffle!

In November we held our Comedy Night which was a great night of drinks and lots of laughs at the Frog and Bucket. We also continue to hold our annual Christmas IIM Council and Committee member get together. This was a fun night with a lot of committee members turning up to network and get in the Christmas spirit.

In February this year we held our Annual Quiz, with teams from insurance companies, brokers, lawyers and loss adjusters, with over 100 attendees at Revolution de Cuba in Manchester. Roddy McLeod did a great job as our quiz master for the evening, with Bridge Insurance Brokers taking the winners' trophy from BIBA.

We would like to thank those individuals that are not a part of the Events Committee but who helped to make our events successful this year, as always we appreciate their assistance with the events to ensure these are a success for our members and the wider insurance community and last but not least we want to thank our wonderful committee who volunteer their time and who make these events possible, particularly when these are almost always held in their own time.

We shall hopefully continue with events in the same manner and plan these based on the positive and constructive feedback received from members of the industry and strive to continue the good work with other professional bodies the committee members have been working towards to for the next presidential year.

Committee members: Emma Longstaff (Deputy Chair) Abi Skolosdra, Amera Manjra, Anita Pollastretti, Andy Blake, Bethan Perris, Caroline Griffiths-Davies, Daniel Whitehouse, Kajal Kaur, Martin Parker, Maxim Dobrov, Richard Townsend

COUNCIL PROPOSED PRESIDENT 2020-2021 ELEANOR MOORE CERT CII



I am very proud to be nominated as the President of the Insurance Institute of Manchester for 2020/21 and pass on my thanks to Victoria Royle of Zurich Insurance who did such an amazing job at the helm for 2019/20.

Recent events have meant that we have changed how we operate and deliver CPD events. I am sure that members will adapt with us and make the most of the opportunities to develop their technical knowledge and soft skills on offer. Our events calendar will look different and it is difficult to know exactly how this will look but members can be assured that networking and social events will remain a priority for the Institute.

We continue to provide the Leadership Programme, which provides future leaders with the skills that they will need to become even better leaders! The Women in Manchester in Insurance Network (WIMIN) continues to go from strength to strength and provides topical CPD events alongside a mentoring programme.

The Fast Track ACII course is in its second cycle, with every person on the first cycle achieving their ACII. The Fast Track Diploma was launched in 2020 and has proven to be very successful.

I have been involved with the Institute for many years, previously serving as Treasurer. I am currently on the Governance Committee, am an Education Champion and a mentor on the WIMIN programme. In my professional life, I am the Private Clients Director at C&C Insurance Brokers, where I have worked for 15 years. Prior to this I was an underwriter and worked in claims, so I have done a bit of everything! I have gained skills, friends and a wider understanding of the Manchester insurance market as a result of my involvement with the Institute.

I would like to see more companies and individuals engaging with the Institute over the coming year and look forward to meeting new and existing members alike.

I am very much looking forward to my year as President in what could prove to be the most challenging yet rewarding year that I have ever seen in my career. The Manchester Insurance Institute has a strong council, talented committee members and so much enthusiasm that I am very proud to be associated with one of the most successful and dynamic institutes in the country. I also look forward to working with Jessica Heaton of Zurich Insurance as Deputy President.

My chosen charity is the National Eczema Society. On a personal level I have lost many months of my life to eczema and would like to help this small charity to fund research and provide support to fellow sufferers.



www.eczema.org

COUNCIL PROPOSED DEPUTY PRESIDENT 2020-2021
JESSICA HEATON CERT CII



It is a great honour and privilege to take on the role of Deputy President for the coming year.

For the last 7 years I've been a fully committed member of The Insurance Institute of Manchester (IIM) and have been part of most committees. I'm proud to say that I'm part of the IIM and passionate about the work it carries out for the Manchester market! Not only in the form of exams, education and CPD but also in the charity work and social events we're well known for. We're a forward thinking, innovative institute that sets the bar across the UK for others to follow!

I'm excited to work with our volunteers on council and committee and continue to watch our institute grow from strength to strength. Especially through the current unprecedented times in all our lives.

I always act with integrity and throughout my time at the Insurance Institute of Manchester have done my best to keep the interest of the members at the forefront of what we do.

During 2020-21, I will also be taking on the role of Regional Forum Officer and will continue with my involvement in the running of the Women in Manchester Insurance Network, so I have a busy year ahead!