





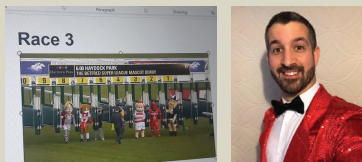
The Insurance
Institute of
Leeds
Chartered Insurance Institute

CoverNotes

SUMMER 2020

Your guide to local career
development

 www.cii.co.uk/leeds
 Insurance Institute of Leeds



Welcome to Leeds Cover Notes

It was a huge honour to take on the role of President of the Insurance Institute of Leeds in April this year at our first ever virtual AGM. It would be fair to say that so far 2020 has been a very challenging year for everyone as we all find our own ways of dealing with the impact of the COVID-19 Pandemic. Despite this I have been so proud to see our team rise to the challenge of keeping engaged with our members and finding ways to help with the local insurance communities wellbeing through this difficult time.



On the Charity front our team have continued to find ways to reach out to our members and collect for the charities we support despite the lack of face to face contact. It's more important than ever to support our charities at the moment as they support others through the Pandemic. As always our money is split between the Insurance Charities and the President's chosen charity of the year which this year is Touchstone. Touchstone are a local charity supporting large numbers of vulnerable people who might otherwise be left isolated and distressed. They provide a huge range of mental health and wellbeing services to over 2000 people a year. If

you can help with donations please do using our Virgin Giving charity page: uk.virginmoneygiving.com/IILPresident

We have had a seamless switch over to webinars for our Educational content including some great sessions to build our soft skills and continued working in collaboration with the Collaborative Professionals Network (CPN). Our Social Team have provided quizzes, a race night, baking competitions and Pilates sessions and more – it has been amazing to see how they have worked towards appealing across such a broad range of activities. The Harrogate Committee

and Emerging Professionals Group have also been adding their own content to our programme.

As all of this has been done by a team that undertake this work on a purely voluntary basis in addition to their day jobs and all of their other home commitments they are doing a truly extraordinary job and I can't wait to see what else they come up with as the year unfolds.

MELANIE JORDAN FCII,
Insurance Institute of Leeds,
President



4,125
MEMBERS

2,506
INSURANCE
MEMBERS

1,619
FINANCIAL
SERVICES
MEMBERS



Managing your mental health working from home

Working from home has its advantages but we should also ensure that when working from home we manage our mental health and wellbeing. What can we do to support our wellbeing while working from home?

OUR TOP TIPS



Maintain communication: Try to organise at least one video call / telephone call daily to stay in touch with colleagues. Isolation can hit people unexpectedly. Make time for chat and conversation about things that are not work, as we naturally do in the office. We all have down days, so it is beneficial to maintain your networks. Why not buddy up with another colleague? Someone you can have a supportive and open discussion when you need to.



Develop a positive routine: Treat the day as any other working day in terms of your hours and breaks. Make sure you take appropriate breaks as you would if you were working in the office. Get up and move around. Keep some healthy snacks and drinks nearby, and do not miss any meals. If you can and are able, try to get fresh air. Use your lunch hour to walk around the block and take a break. Just as you should start your day with a routine, create a habit that signals the close of the workday. It might be an evening dog walk or reading a book.



Ensure your work space is right: Ensure your working environment is safe and as comfortable as possible. Consider issues such as a dedicated space, headphones, and other ways to make your working day most comfortable and efficient.



Manage your own mental health: Mental and physical health are very important. Use your commute time at the beginning and end of each day to do some exercise or physical activity. Whatever your fitness level there are several activities that you can do including yoga, dance and a whole range of physical activities online. How about trying mindfulness? There are also many apps including Headspace and Calm as well as meditation and mindfulness videos online.

Connecting with members on another level

The Insurance Institute of Leeds, along with the Harrogate Committee have been busy organising Pilates classes for members to ensure they stay fit, healthy and relaxed whilst embracing working from home.



Health and wellbeing have been paramount over the last few months and it's great that we have been able to pull together to support each other. The virtual style "Zoom" Pilates classes have been a big hit with members and have become a new ritual for starting the weekend in style, taking place on a Friday lunchtime.

"Friday's Pilates class was really enjoyable, a fun way to spend a lockdown lunchtime with a lovely instructor. Many thanks for organising this!" – **Karen Hadley, Retired**

"I thought this was an excellent session with a bit of everything, thought had been given to the fact we'd been sat at a PC for ever. The Instructor really takes note of the posture you have and gives alternatives and also challenges if she thinks you can do more!! I would definitely join another session." – **Karen Hadley, Retired**

"The class was great, thanks very much. My first Pilates activity in 8 weeks!" – **Imelda de Bruin, Manse Capital**

Other social and networking activities have included a fortnightly Virtual Quiz, Charity Race Night, Bake Off Competition and Virtual Book Club. Are there any events you would like to attend? Contact us at leedsinstitute@cii.co.uk

For further details and bookings visit:
www.cii.co.uk/leeds

Congratulations!

We would like to congratulate our National Prize Winner, **Heather Jacombs** from Marsh on her recent achievement in the Worshipful Company of Insurance Prize in Certificate in Insurance. We wish Heather all the best in her future studies and career.



Helping to protect our vulnerable customers

Last year, the Insurance Institute of Leeds (in association with CHANGE the learning disability charity) held a half day workshop to try to understand the challenges vulnerable customers face in day to day life. This year (and following the impact of COVID-19) it is more important than ever for firms operating in the financial sector to be able to identify vulnerable customers and have policies and procedures in place to assist them. Particularly in circumstances where those customers might not be in a position to physically attend the firm's offices.



The Financial Conduct Authority defines a vulnerable customer as 'someone who, due to their personal circumstances, is especially susceptible to detriment, particularly when a firm is not acting with appropriate levels of care'.

It is possible that going forward more and more individuals will fall into that category with individuals experiencing financial hardship and mental health and wellbeing challenges following the impact of COVID-19. With that in mind, it is important for firms to review their guidance and training given to their staff alongside their internal policies when working with vulnerable customers.

Whatever the individual vulnerability, it is important that firms investigate an individual's circumstances properly and react appropriately. Not only will this ensure that an individual is receiving the appropriate advice and product but it will also ensure that, providing the advice and procedures followed are recorded and implemented properly, the firm will be taking steps to avoid potential complaints to the Financial Ombudsman Service and/or claims for professional negligence.

GIVERNY WROE

Solicitor at Mills & Reeve LLP

Who gets to find out what?

There seems to be noticeable imbalance within the ranks of CII and PFS members. Some members receive a whole range of useful and informative communications. These can vary from localised CPD programmes and social / networking events arranged by local institutes to information and facilities available and relevant to all members nationally such as study and examination updates, events, awards and society / faculty information.

On the other hand there are members who comment (and yes...in some cases complain) that they have missed out, been overlooked and wistfully note that they wish "they had known about that", "would have gone to that if they had known it was happening" etc.

The answer to this apparent disparity in the "who gets to find out about what debate" often lies quite simply in how much individual members themselves are taking responsibility for establishing their own communication preferences with the CII / PFS and therefore with their local institutes.

This in itself is often fuelled by a misconception that by allowing oneself to open up to receiving various notifications from the CII and PFS there will follow a deluge of communication that is either irrelevant or inappropriate. The reality however is that you are in complete control of what you receive. And the process of exercising this control could not be more simple.

To be certain about what the CII / PFS does with your data, firstly look at the CII's Data Protection and Privacy Statement. It is an excellent document - clear and concise - and can be found at: www.cii.co.uk/about-us/data-protection-and-privacy-statement

When you have satisfied yourself about the integrity of how your information is used, check and if necessary update your communication preferences by heading to the website and log in.

To access the Chartered Insurance Institute (MyCII) website go to www.cii.co.uk. To access the Personal Finance Society (MyPFS) website go to www.thepfs.org.

The link to the login page can be found in the top right corner of the homepage. The process for logging in and updating preferences is the same for CII and PFS members. Head to the "My Profile" page and click on "Communication Preferences" and away you go.

The whole process will take between 5 and 10 minutes and will deliver considerable benefits. It will also ensure that you are receiving full value for your membership fee by raising awareness of all the many activities which are available and allowing your participation.

No more missing out. Just simple, effective, relevant, and informative notifications and communication. The best way surely for you to ensure that you are one of those who "gets to find out what..."

"...YOU ARE IN COMPLETE CONTROL OF WHAT YOU RECEIVE..."

DAVID ROSS ACII CIP

Insurance Institute of Leeds, Education Secretary

Education overview

As we all know the onset of lockdown as a result of the Coronavirus pandemic has caused much disruption, with the insurance profession not being immune. However Local Institutes up and down the country has responded magnificently by finding innovative ways of continuing with their CPD programmes and the Insurance Institute of Leeds is no exception.

Investing in Microsoft Teams and Zoom, as well as the requisite training from our Regional Engagement Executive Karen Fothergill, has enabled us to continue provide a regular programme of high quality CPD events. We have become driven by a keen desire to ensure that our members do not become isolated during these difficult times, which in turn has resulted in a programme of more frequent and highly relevant events.

Since the AGM on 21st April, we have produced events based around a blend of technical subjects and soft skills which will allow people to cope with and in many cases develop and thrive during lockdown.

Technical subject matter has inevitably included various COVID-19 related topics, including what

insurance businesses need to do to deal with the impact of Coronavirus and the regulatory changes that are happening (rapidly!) as a result of the pandemic. Away from COVID-19 we enjoyed a superb webinar from Bernard Thornton on the next steps for Personal Injury Claims with the onset of the forthcoming changes to the Civil Liabilities Act.

Members have clearly enjoyed the non-technical webinars, with topics including Managing Your Career in Difficult Times and, in conjunction with our friends at the Collaborative Professionals Network (CPN), How to Build Your Confidence and Homeworking and Mental Health the latter delivered by the excellent Jodie Hill of Thrive Law.

Interestingly, although we are all missing the personal

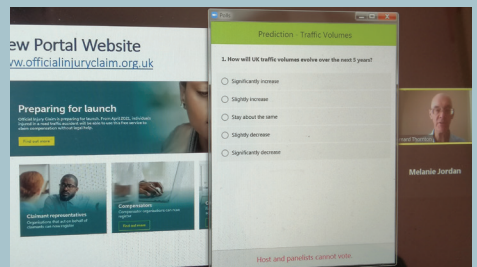
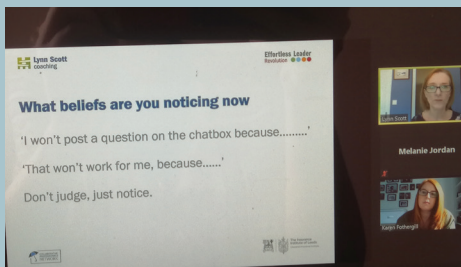
connection and face to face networking that the traditional CPD programme allows us to participate in, numbers attending these webinars have been high with most being fully subscribed.

If you have not received any notifications of these events please see the article contained in this edition of Cover Notes about your Communication Preferences.

Alternatively, if there are any particular topics that you wish to see covered in the coming weeks or months please email me at leedsinstitute@cii.co.uk and we will be only too happy to see if we can accommodate your suggestions.

DAVID ROSS ACII CIP

Insurance Institute of Leeds,
Education Secretary



Let's row to success together

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6 York Place, Leeds LS1 2DS. 0113 244 0846 recruit@iauk.co.uk