

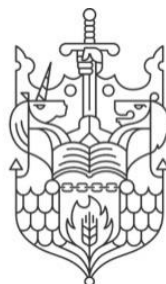


# The Insurance Institute of Leeds

## ANNUAL GENERAL MEETING

Tuesday 21<sup>st</sup> April 2020

## Council Reports 2019-2020



The Insurance  
Institute of Leeds

Chartered Insurance Institute

## Programme

- Welcome - Meet YOUR Council
- AGM including President's address
- Incoming President's address: Aims 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



## Agenda

1. Apologies
2. Review Minutes of AGM 2019
3. Any matters arising
4. To receive and adopt the Annual Report of Council for 2019/2020
5. To receive and adopt the Treasurer's Report and Accounts for 2019
6. **Nomination of Roles:**
  - 6.1 President's review of 2019/2020 by Chris Lockwood
  - 6.2 President 2020/2021 is Melanie Jordan of Henderson Insurance Brokers  
(Presentation of badges to be done at a later date)
  - 6.3 President Elect 2020/2021
  - 6.4 Life Vice-President for the session 2020/2021: Keith Reynolds, Peter Moran ACII  
Vice-Presidents as follows:
    - a) *Ex-Presidents:* David Ross DIP CII, Stuart Robertshaw, Julia Wilding ACII, Karen Malin ACI, Andrew Warrender FCII, Richard Hobson ACII, Bernard Thornton FCII, Clive Batchelor ACII, James Ramirez Dip CII, Chris Lockwood Cert CII
    - b) *Council Member:* Peter Moran ACII
  - 6.5 Ex-officio members of the Council for the session 2020/2021 for the following positions:

Secretary:	Nick Brabham
Treasurer:	Kim Spence

**Committee Chairperson(s) & Representatives**

Education Secretary:	David Ross
Sports & Social:	Craig Hosking
Dinner Secretary:	Bernard Thornton
Charities Team Leader:	Chris Lockwood
Management Team Leader:	Peter Moran
Regional Forum Officer:	Kate Edmondson
Harrogate Local Committee Chair:	James Ramirez
Emerging Insurance Professionals Chair:	Isaac Pollitt
  - 6.6 **Council Members** for the session 2020/2021:  
Adam Martell, Adele Scholey, Daniel Wakefield, Giverny Wroe, John Hughes, Kieran Fletcher, Michelle Gilmore, Richard Hobson, Sarah Edwick, Simon Coletta, Ted Matson  
**Emerging Insurance Professionals:** Jonathan Catley, Nick Watson, David Tew, James Cryan, Laura Jackson, Holly Copsy, Holly Brooke, Phoebe Webb, Charlotte Holdsworth, Will Barnett
  - 6.7 Charities Representative 2020/2021 is Steven Copsy
7. To appoint accountants for the session 2020/2021
8. Presidents message – aims and objectives for the year
9. Confirmation of date of next AGM
10. Closure of meeting

### General information

**Address:** The Insurance Institute of Manchester  
101 Princess Street Manchester M1 6DD

**Tel:** 0161 236 2926

**Email:** [leedsinstitute@cii.co.uk](mailto:leedsinstitute@cii.co.uk)

**Website:** [www.cii.co.uk/leeds](http://www.cii.co.uk/leeds)

**LinkedIn:** Insurance Institute of Leeds

## PRESIDENT'S REPORT

### CHRIS LOCKWOOD CERT CII



March 2019 to March 2020, 366 days on the Calendar and it has been my privilege to serve as your Leeds Institute President for all of them. As I look back and try to convey in writing what the year has entailed it is with both sadness and pride that I write this report, sadness in that I will no longer be in the role but proud of the Leeds Institute and all that we achieve as a dynamic Council and a supportive membership.

Two particular events will remain with me for a long time, firstly the Annual Dinner; to see the huge amount of hard work put in by so many people come to fruition on the night and to obtain the feedback we received justified James decision in 2018 to move the event, Melanie as incoming President will see us have three year in succession at the Royal Armouries.

The glitz and glamour of our Annual Dinner was for me though surpassed by our joint event with Change, our Vulnerable Customers day. Having a day where we were able as an Industry to start to understand the needs of some truly inspirational individuals gave me and the rest of the team the impetus to be as good as we possibly could be in our volunteer roles.

It remains pleasing to see that despite numerous consolidations in the broker environment and some Insurers changing their local strategy and closing office our membership number remains healthy at over 4000. Our aim is to provide content that embraces all aspects of our profession and as you will see from our Education report we have provided varied, topical and with the Hostage Negotiator event enthralling subjects.

The Management team provides the "Audit" function of the Institute. Peter Moran (who was my mentor – Thank you Peter) makes sure that run as effectively and efficiently, because all the sub committees are so well organised and structured it is pleasing that as a Management team we have been able to review and improve rather than have to make drastic changes, again testament to the professionalism of the volunteer council.

The Insurance Institute of Leeds continues to evolve, make changes where required and be effective for its members. One of the small changes we made this year was to issue the two publications of Cover Notes within the CII Journal, seems a simple idea but getting print times/ articles and deadlines in to fall in line with a national publication is no easy task but the savings as listed in the Treasurer's report were one of the drivers.


Building relationships with local schools, colleges and universities to engage with young people about careers in the insurance Industry was my principal aspiration when I became President. I know that the work we have done so far has been extremely well received by those educational establishments and it is pleasing to see that we continue to work on this from a Leeds and Harrogate perspective. Our Emerging Professionals group that was set up in 2018 continues to be a great conduit between educational lives and working lives.

Leeds as an institute is unique in that we have a joint team in Harrogate, many institutes around the country would like to see the spectacular results that James Ramirez and his team put together, his report details just how much they do and all of their work is added to Leeds Year End appraisal. When James was Leeds President 2018/2019 his assessment score was "Exceeding" with 100% weighting on our 19/20 grant, thanks for leaving a great legacy for me.

The "Shop Window" of an Institute is always its Annual Dinner, we all know that Leeds Insurance Institute is so much more than just six hours on a wet Friday in November, but it does seem to be where people focus their attention. Bernard Thornton has provided an in-depth report regarding the

outcome, as for booking the Firemen at no extra cost that was a stroke of genius, it certainly got everybody in their seats on time.

Writing this as we are in the middle of the single biggest National challenge since World War II has given me time to reflect and as we are all doing right now concentrate on supporting those that are in a less fortunate position. It is with great pride that the work Michelle Gilmore and her Charities team put in was recognised by the CII with Leeds being jointly presented with Dublin the Centenary Charities Shield in recognition of our significant contribution to promoting the charities work. Michelle is stepping down from her role after eight years; I am sure that everyone who you have worked with across that time will follow me in congratulating you, you have huge shoes to fill!



Thank You, thank you, thank you.....

Every successful team has one thing at its core and that is commitment to a common goal, The Insurance Institute of Leeds Council members have once again excelled in delivering 12 months of opportunities to its membership, whether it is Education, Charity work, Social events, soft skills or providing networking opportunities it has led to a very satisfying term of office for me.

As Council members I appreciate all of the work you have done as teams and individuals, this is my collective "Thank You" to you all, however there is one unsung hero that remains the glue that sticks all the component parts together, Karen Fothergill our Regional Membership Executive will be known and seen by many of you at our events. Karen makes sure that the How, When, Where, What, Who and Why is done, giving us the professional touch that is so evident in all The Insurance Institute of Leeds does. Many thanks from us all!

So, Mel the baton is passed, I am sure that you will embrace the role as you have done with your Educational duties. You will no doubt get the same support I did, as such you have absolutely nothing to worry about. Enjoy your time and I wish you well in your year!

## TREASURER'S REPORT

KIM SPENCE

ACCOUNTS FOR YEAR ENDED 31<sup>ST</sup> DECEMBER 2019

After two years of actively reducing our accumulated funds from previously high levels, in 2019 we managed to find a good balance and lowered our expenditure from £117,005.03 down to £87,640.59 which is a difference of £29,364.44. This was mainly down to reducing the costs for other professional services such as PR which we felt had minimal impact on our members.

For the second year in a row we are delighted to announce that we will receive the maximum grant available of £59,431 which is payable in two instalments throughout the year. The size of grants awarded are based on local institute best practice and the provision of member services across the UK. All institutes are now allocated to one of four bands – exceeding, mastering, progressing and needs addressing. Not only did we fall into the 'exceeding band' but we achieved a rating of 100% which we hope to continue next year.

Our biggest expenditure is still focused on providing CPD and Educational Activities for our members. Although we spent £44,451.39 in 2019 compared to £59,751.09 in 2018, we did not reduce the number or quality of events. Instead we managed to reduce costs by getting some speakers and venues for free or cutting some costs at our half day events.

Due to good feedback from our members we held our popular annual dinner at the Royal Armouries for the second year in a row. This gave us income of £23,130.87 and as our outgoings amounted to £21,729 it is a self-funding event.

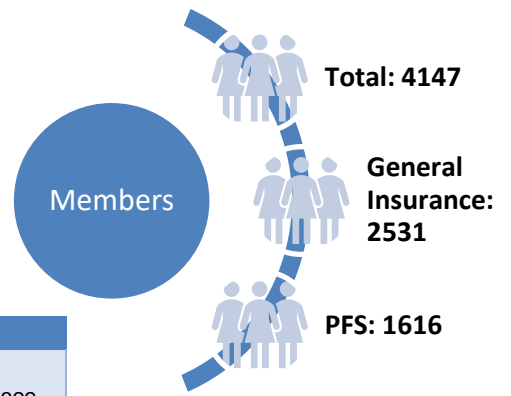
We will endeavour to support our charities going forward and continue with our 'Annual Raffle' where we navigate our way between various offices in fancy dress raising as much money as possible in exchange for a generous monetary prize for the holder of the winning ticket!

We remain confident that the Leeds Institute continues to be in a financially healthy condition and we are looking forward to putting on events in 2020 which we hope will appeal to a broad spectrum of our members.

**Insurance Institute of Leeds**  
**General Fund – Income and Expenditure Account**  
**For Year Ended 31<sup>st</sup> December 2019**

2018 £	2018 £		2019 £	2019 £
		<b>INCOME</b>		
37,084.00		Ordinary Grants	59,190.00	
5.21		Interest Earned	5.19	
	37,089.21			59,195.19
		<b>ANNUAL DINNER</b>		
	23,260.00	Income		23,130.87
		<b>OTHER INCOME</b>		
250.00		Reimbursement Awards	200.00	
5,672.34		Charity Income	5,892.44	
1,209.37		Educational Courses	2,703.20	
2,064.95		Reimbursement Exams	1,482.70	
648.00		Social Events (not dinner)	1,294.00	
423.80		Other Income	750.00	
1,000.00		Sponsorships (not social or charitable)	0.00	
	11,268.46			12,322.34
	<b>71,617.67</b>			<b>94,648.40</b>
		<b>EXPENDITURE</b>		
21,873.62		Annual Dinner	21,729.00	
550.00		Awards	750.00	
5,731.04		Charity Payments	5,211.77	
1,205.21		Council and AGM Meetings	1,130.36	
59,751.09		CPD & Educational Activities	44,451.39	
2,074.37		Exams	1,712.04	
872.88		Insurance	892.29	
700.67		Officer Expenses	1,430.88	
1,502.60		Other Expenditure	4,356.87	
20,234.00		Other Professional Services	3,411.81	
2,007.25		President Expenses	1,204.18	
502.30		Social Events	1,360.00	
	<b>117,005.03</b>			<b>87,640.59</b>
	(45,387.36)	<b>Surplus of Income over Expenditure</b>		<b>7,007.81</b>

**SECRETARY REPORT**  
**NICK BRABHAM ACII**  
 FROM DATA RECEIVED MARCH 2020

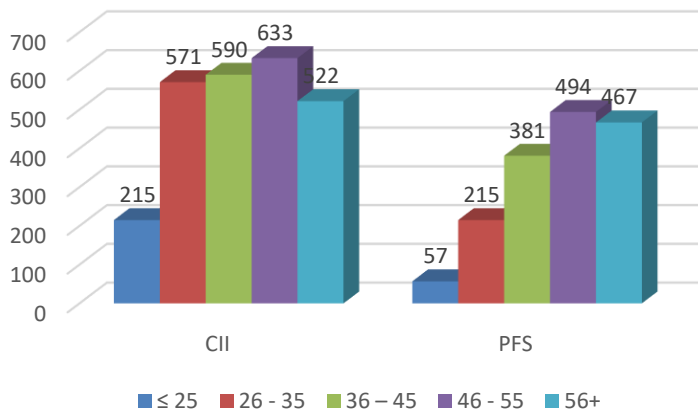


CII		PFS	
<b>Chartered</b> (Chartered Financial Planner)	2	<b>Chartered</b> (Chartered Financial Planner)	322
(Chartered Insurer)	172	(Chartered Insurance Broker)	1
(Chartered Insurance Broker)	118	(Chartered Insurance Practitioner)	17
(Chartered Insurance Practitioner)	120	(Chartered Insurer)	5
(Chartered Insurance Risk Manager)	12		
<b>FCII</b>	91	<b>FPFS</b>	134
<b>ACII</b>	506	<b>APFS</b>	207
<b>Dip CII</b>	159	<b>DipPFS</b>	927
<b>Cert CII</b>	659	<b>CertPFS</b>	111
<b>Ordinary</b>	1103	<b>Student</b>	231
<b>Senior</b>	13	<b>Aff-Subr</b>	6

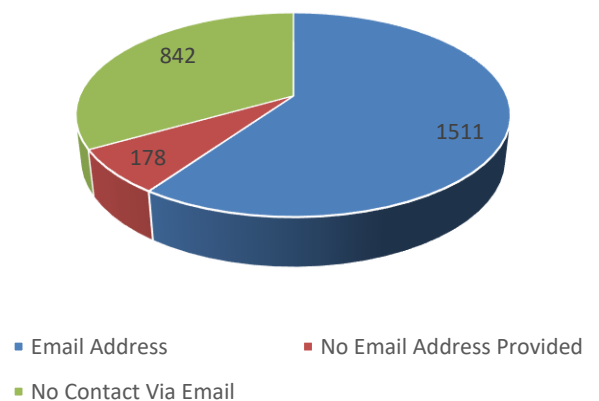
**Key companies with 15 or more members (those members who specified employer):**

CII	CII	PFS
ACE – 15	Jelf – 94	HSBC – 34
Allianz Insurance – 71	Lloyds Banking Group - 18	Skipton – 46
AON – 24	Markel - 16	St James Place – 195
Arthur J Gallagher – 29	Marsh – 38	Tenet – 20
Aviva - 72	Marshal Wooldridge – 24	The Private Office – 33
AXA – 41	QBE – 29	
Bartlett – 57	Raven Hall - 16	
Blufin – 28	Romero Insurance - 44	
Cunningham Lindsey – 15	Royal & Sun Alliance – 129	
Direct Line – 69	Skipton – 15	
Eastwood & Partners – 15	Towergate – 102	
Gauntlet Group – 18	W Dennis Insurance Brokers – 22	
Henderson – 22	Zurich - 153	
Hiscox – 15		
HSBC Bank Plc – 25		

**Member Ages**



**Communication**





## MANAGEMENT COMMITTEE REPORT PETER MORAN ACII, CHAIR

The Insurance Institute of Leeds Management Team is appointed annually at the Annual General Meeting. The role of the team is to monitor the activities of the local Council to ensure that these are carried out in a professional manner within the rules and regulations of both the Chartered Insurance Institute and the Insurance Institute of Leeds. Particular emphasis is placed on the Council's finances to be sure that all funds are dispersed efficiently for the benefit of all our members.

The team is usually made up of senior council officers together with the addition of long serving council members. For 2019/20 the team was Peter Moran (Chair), Nick Brabham (Secretary), Chris Lockwood (President), Melanie Jordan (President Elect) and Kim Spence (Treasurer). As the year progressed a regular agenda item was a review of the Annual Dinner and it was agreed the Bernard Thornton (Dinner Secretary) should be co-opted to the team and he duly became a permanent member.

The team allows all other Council teams to conduct their affairs independently and will only become involved if asked to do so or if there is evidence of a problem.

In addition to three formal meetings, 19 July, 04 October and 10 January 2020 there was regular communication among the team by telephone and email.

### **Matters discussed:**



My thanks go to all team members for their input throughout the year and to the retiring President for provision of a meeting venue and refreshments.



## EDUCATION COMMITTEE REPORT

### MELANIE JORDAN FCII, EDUCATION SECRETARY

Over the course of the last twelve months the Education team has delivered a full programme including 13 lectures, 6 Leadership Workshops, 4 Half day Events, 3 trips and 1 revision day: -

#### Education Programme 2018-19

**13/03** Business Interruption Half Day (Harrogate)  
**16/04** Risk Vs Reward – Claims against IFAs (PFS)  
**17/04** Getting the Important Stuff Done – Half Day Soft Skills Session  
**23/04** EIP Lloyds Trip  
**24/04** Walking Tour  
**14/05** Joint lecture with Bradford, Civil Liability Bill  
**15/05** Understanding Leadership – Half Day Soft Skills Session  
**11/06** LinkedIn – how to build your brand  
**11/06** Developing and Maintaining a Positive Mindset – Half Day Soft Skills Session  
**09/07** Cyber Liability  
**17/07** Harrogate Lecture - Renewables  
**17/07** Vulnerable Customers Half Day  
**07/08** IFB talk to us about Fraud  
**10/09** Long term Care solutions (PFS)  
**11/09** Having Difficult Conversations – Half Day Soft Skills Session  
**20/09** M92 Revision Day  
**24/09** NERG – Fire!  
**25/09** CPN Network – Inga Beale evening (Being Kind)  
15/10 Marine Claims  
**16/10** How to do a 1-2-1 that really works – Half Day Soft Skills Session

**06/11** Harrogate – Escape of Water Lecture  
**12/11** Intellectual Property  
**13/11** Presentation Skills – Half Day Soft Skills Session  
**27/11** Hostage Negotiator – Transform your ability to influence  
**14/01** Interactive Leadership Seminar with Rob Northfield  
**21/01** Indemnity Periods and Business Recovery  
**05/02** Climate Change Day  
**11/02** SMCR  
**13/02** Trip to the Kingspan Factory

As always thanks go to all of the Education team for their assistance in putting the programme together, providing venues, speakers and support and also to the Harrogate Local Committee for all of the events that they have arranged over the course of the year. Also, thanks to all of the speakers who voluntarily gave their time to add to the programme during the period.

The Fast Track Programme has continued over the course of the last year, continuing to aid the members of that group in working towards their Diploma. They are due to finish the last of their training sessions in April and therefore hopefully they will all graduate with their diploma's in 2020.

Progress has continued over the last twelve months with further contact arranged promoting insurance at both local schools and both the University of Leeds and Leeds Beckett University. This has been pushed forwards over the course of the year by our President Chris Lockwood.

We will continue to deliver a varied CPD programme into the next year.



## **SOCIAL COMMITTEE REPORT**

### **CRAIG HOSKING CERT CII, CHAIR**

#### **2019/2020 Events**

##### **Walking Tour – 24th April 2019**

The social part of this event was cancelled due to the lack of interest.

##### **Virtual Quiz – 15th April 2020**

The first of its kind to be done via Zoom was a great success. Bernard Thornton was the excellent Quizmaster and great fun was had. More events of this type are planned for the near future.

#### **General Comments:**

Sadly, a combination of personal health issues and an extended role with my employer resulted in a lack of social activities on my behalf for this year.

Thankfully, the Emerging Young Professionals group propped things up and held several events of their own throughout the year such as a quiz and summer BBQ.

#### **2020/2021 – Forthcoming Year**

The current COVID-19 pandemic will greatly affect how the social plan for this year pans out due to the implantation of social-distancing.

To this end, there are a couple of potential plans:

##### **1) Pandemic resolves soon and social-distancing measures cease:**

There will be 3 x key events throughout the year, with the option to add additional events if required.

The following is the fluid plan:

#### **2020/2021 Sports & Social Planner**

##### **Core Events:**

Event 1 – July Treasure Hunt

Event 2 – October Quiz Night

Event 3 – January possibly a comedy night, payday pub drinks, brewery tour or retro games evening

##### **2) Pandemic doesn't resolve soon, and social-distancing measures are maintained**

The events will consist of virtual/online social events, such as the recent quiz night.

Whilst several quiz nights can be facilitated quite easily, more thought should go towards other potential social events which can be done virtually and online.

We would need to also need to take into account what technology we have available to use for any other online events.

#### **Additional Comments**

Engagement with the newly formed Sports & Social committee will take place to discuss the above and to finalise.

As noted during the expiring year, more engagement and participation is required from the Sports & Social committee to achieve the number of above planned events. The control, organisation and implementation of any Sports & Social committee planning meetings to rest with the Sports and Social Chair.

## DINNER SECRETARY REPORT

### BERNARD THORNTON FCII, DINNER SECRETARY

The 2019 Dinner, held at the Royal Armouries for a second time, was generally seen as a successful event and good feedback was received from members, guests and table hosts. Congratulations to President Chris Lockwood on a memorable evening and a virtuoso personal performance!

**As in the previous year, the Armouries gave us excellent co-operation and support and we had no hesitation in confirming the 2020 Dinner at the same venue. Due to a previous booking at the Armouries we have moved the date forward a week to 30th October 2020. Save the Date!**

Our Dinner is building up a very positive reputation within the business community generally and we are looking for an increased attendance this year, especially from external service providers to our profession. If anyone has any suggestions for new prospects please contact me as early as possible.

Numbers were down on 2018 (358 against 403). Some regulars were committed to events elsewhere or had budget constraints. Others mentioned school half term holiday as a problem. We have already issued a 'save the date' notice for 2020 and will ensure that invitations go out earlier. One other area for consideration is how we can ensure a slightly earlier finish to the formal proceedings, i.e. before 11pm.

Despite the reduction in paying guests, we managed to return a break-even financial result, due to a slight improvement in sponsorship income and an increase in ticket price from £60 to £65.

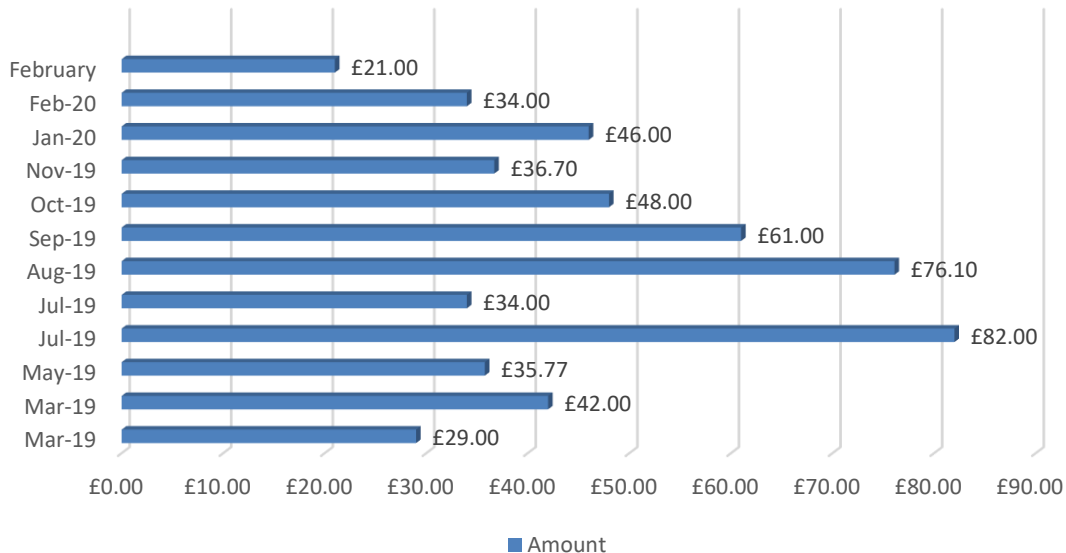
**My thanks go to all who helped with the organisation of the 2019 dinner, especially the Emerging Professionals Group, Michelle Gilmore for organising the Charities side and Karen Fothergill, who was a tower of strength throughout.**

Discussions for 2020 are already under way with incoming President Melanie Jordan and we had an initial meeting with the Armouries on 11th February. Mel has already secured an exciting after-dinner speaker. One new sponsor is on board, discussions with a second are well advanced and we anticipate no difficulty in securing our target of three. We look forward to seeing you there!



## CHARITIES REPORT MICHELLE GILMORE ACII, CHAIR

### Funds collected from lunchtime lectures



Charities Day - £1,480

Annual Dinner  
Silent auction = £635.57 plus  
raffle = £3,029.10

#### **OVERALL:**

*£5,710.34 (last year = £7,442.59 BUT over £2k from  
3 peaks event so up outside of this)*

#### **Annual Round-Up**

- 5% up on 2019 total if we exclude the three peaks event.
- As usual – most of our income came from the annual dinner (64%); 26% came from Charities Day.
- Charities continues to play a part in all CPD lectures and social events: in addition to the Charities Day event.
- Mel's charity still to be confirmed for next year and potential split (50/50)
- Chris Lockwood to take over as Charities Chair for 2020/21.

"I will still sit on the committee as a deputy. I'm sad to step down but due to work commitments, I unable to put in the same time that I have in the past. I'm so grateful for all the support I've received in doing this role for the last 8 years. Thanks to my team for their help with all events and taking time out of their day jobs. They've pounded pavements in fancy dress and ran around ballrooms in heels for Charity and I've been lucky to have a group of people making my job so much easier!"

## MARKETING REPORT CLIVE BATCHELOR ACII

The main aim for the Marketing committee during the year 2019 to 2020 was to continue to make our members aware of our excellent programme of events by continuing to run our newsletter, Cover Notes, despite receiving a reduced budget. The very high costs involved printing and, in particular, distributing Cover Notes in its traditional format meant that this was not possible on the reduced budget so Council made the decision to produce a more compact publication which is then distributed with The Journal three times a year, thus eradicating the distribution costs. The new style publication is up and running and achieves its aim.

In addition to Cover Notes, the institute also continues to market its programme of events via its website which is very ably run by our excellent Regional Membership Executive, Karen Fothergill, and the institute also has a digital presence with its own LinkedIn page which have been run by Sarah Edwick this year.

Council has also sought to publicise the excellent work carried out by The Insurance Charities and raise awareness of how this works for the benefit of our members. This is achieved by publishing the charity's newsletter on our website and also by including articles within Cover Notes when possible.

**You can find recent copies of Cover Notes here:**

[February 2020](#)

[September 2019](#)



**Keep up to date with our news, activities and events at our LinkedIn page: [Insurance Institute of Leeds](#)**



### **Not getting the emails**

We intend to keep you informed of all our forthcoming events via email. As with a growing number of organisations, email is our main method of communication. It is timely, highly cost-effective and helps to reduce our carbon footprint.

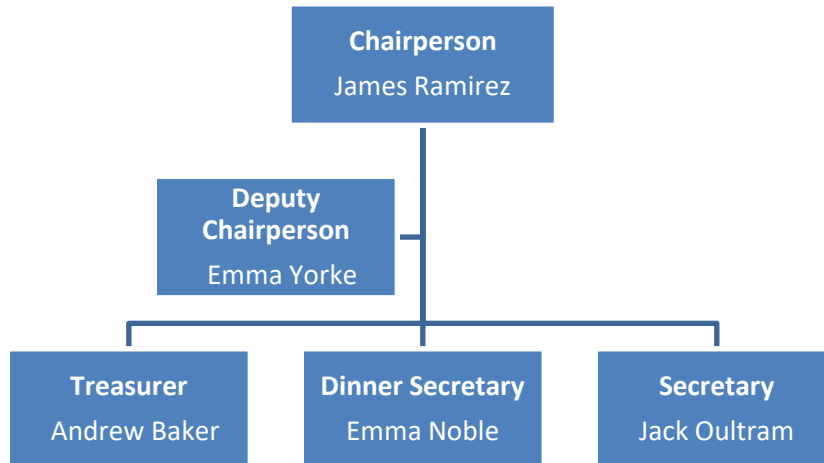
You can check and update your details online at [www.cii.co.uk/MyCII](http://www.cii.co.uk/MyCII) or email [customer.serv@cii.co.uk](mailto:customer.serv@cii.co.uk) or call +44 (0)20 8989 8464 with your CII Pin.

## HARROGATE LOCAL COMMITTEE REPORT

### JAMES RAMIREZ DIP CII, CHAIR

I would like to thank all members of the Harrogate Local Committee (HLC) who contributed during the year and took ownership and responsibility for the various events we undertook.

Our AGM took place on the 11<sup>th</sup> February 2020 and the following officers were elected:



**Other committee members include** – Dave Bushell, Simon Coletta, Mark Holley, Jessica Kelly and Phoebe Webb.

We say goodbye to a past chair and long-term committee member Paul Reay and place on record our thanks for his efforts on the HLC. We wish Paul all the very best and hope to welcome him back in the near future.

A copy of the general accounts has been submitted to the Insurance Institute of Leeds by our Treasurer Andrew Baker.

### 2019 Events as follows

#### Education

##### Half Day Seminar

Topic – Business Interruption

Speaker – Alan Chandler with 33 Attendees

##### July Lecture

Topic – Renewable Energy

Speaker - Neville G.H. Green, Underwriting Manager, Allianz Engineering Construction and Power with 42 attendees

##### November Lecture

Topic – Escape of Water

Speaker - Pauline White, Zurich with 55 attendees – most popular lecture in recent history!

#### Discover Risk / Careers Fairs

We have identified contacts at the following schools to approach re Discover Risk and possible career fairs attendance: St Aidans, Ashville, King James, Harrogate Grammar and Boroughbridge High. We are currently researching the best contacts for the following schools: St John Fisher, Harrogate

Ladies College, Rosset, Granby and Harrogate College.

#### Social Events

##### Quiz

Was held at Harrogate Cricket Ground. A huge success with 56 attendees and 10 teams (*Insurance Institute of Leeds Council, Tenet Group Ltd, J M Glendinning Professional Risks, iWealth Ltd, Broker Network, Henderson Insurance Brokers, Jelf, HMCA x 2, AIUA*) £178.75 Raised for Charity via raffle. The Winning Team was the Leeds Council.

#### Treasure Hunt

Held around Harrogate, 10 teams booked (*4 x HMCA, 2 x Aston Charles, Jelf, Leeds Institute, Marshall Wooldridge and a team of mixed individuals*). The Winning Team – HMCA.



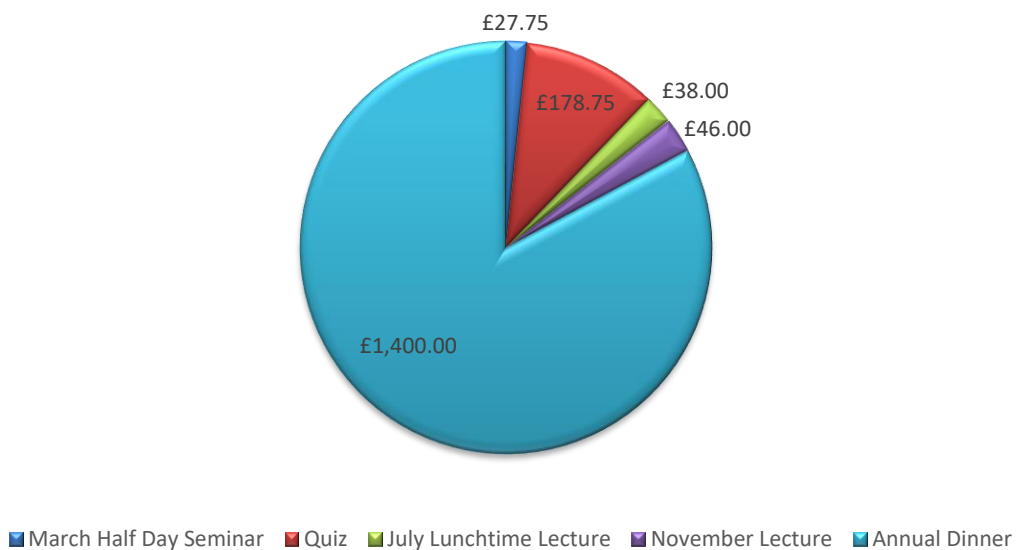
## Charities

The Chair's Chosen Charity, we supported Harrogate Mind alongside The Insurance Charities for 2019/20 Insurance Charities Week.

We supported the Insurance Institute of Leeds annual charity raffle by coordinating collections across companies in the Harrogate area:

- £158 raised
- Additional £100 donated by HMCA and arranged via Andrew Baker

## Amounts Raised



## Marketing

Thank you to Karen Fothergill, Regional Membership Executive from the CII for helping us to promote and organize our events via the IIL website and e-flyer system. Thanks to Sarah Edwick for LinkedIn posts regarding our events.



“We would like to give thanks to the Insurance Institute of Leeds for their continued support!”



## EMERGING INSURANCE PROFESSIONALS REPORT ISAAC POLLITT CERT CII

The last 12 months for the Emerging Insurance Professionals (EIP) have been quite steady but things have probably not been driven forward quite as much as we'd have hoped, however the start of 2020 has allowed us time to put in place plans to push the group forward for the upcoming Presidential year.

### 2019 Overview

Firstly 2019 saw the addition of two new members to the council, Will Barnett and Charlotte Holdsworth who have settled right in with us and have added great value.

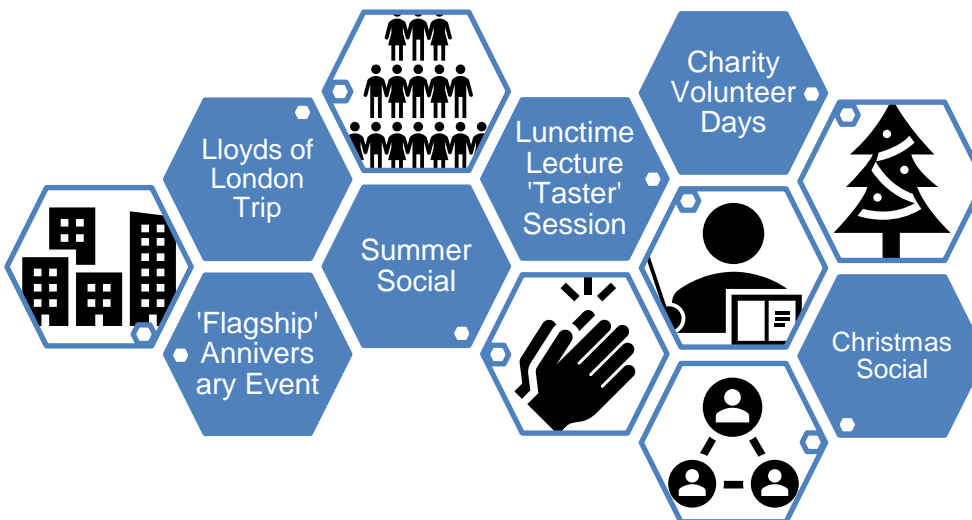
We have sent representatives to the three different University Careers days at the Leeds universities organised by Vivine Cameron, CII and we hope to continue to work with her, as well as taking our first trip down to Lloyds of London back in May.

From a social aspect we had a few successful events in the Summer BBQ and Christmas Social which were both well attended. Feedback was received, that we have reviewed to ensure we make sure future events remain a success. Alongside this we have gathered pace with our social media presence on LinkedIn to promote all events.

The group also provided Bernard Thornton, Dinner Secretary with our assistance at the Annual Dinner which I am sure everyone will agree was again a great success.

### Moving Forward

As mentioned above, the current calendar is on hold for the foreseeable future, but plans had been put in place for our Quiz which should have taken place on the 8<sup>th</sup> April. Other events that are to be taken forward once COVID-19 guidelines allow, as follows:



We are really looking forward to creating relationships within the Social and Education events to ensure we are making the most of our time with attendees.

On the charity aspect, we are aiming to donate time rather than monetary contributions which have recently caused us some problems.

Thank you to all the volunteers who have contributed over the last couple of years, we look forward to continuing our aims and goals.



Keep up to date with the Emerging Insurance Professional news and activities here: [Emerging Insurance Professionals – Leeds Institute](#)