

Bachelor of Arts (Honours) in Insurance Practice
Level 8

Statutory Insurance Practitioner Apprenticeship
(Level 8)

Work Based Learning Manual

Version 6. 01 September 2020

Document Control Page

Version Number	Date	Notes
1	8 Sept 2016	Final version for first intake.
2	4 Sept 2017	Final version for second intake.
3	6 Sept 2017	Amended for Life work tasks
4	12 Sept 2018	New draft for 2018
5	29 Aug 2019	Amended to include tasks replacing some reflective diaries.
6	01 Sept 2020	New draft for 2020

Introduction:

This manual outlines the method of delivery and assessment of the work based learning (WBL) element (known as 'on-the-job') of the practice modules of the BA (Hons) in Insurance Practice.

In addition to the practice modules, the assessment in other modules of the academic (known as 'off-the-job') will draw on the apprentice's experience in the workplace as part of their assessment.

This manual will also outline the supervisory and mentoring roles in assessing the practice modules.

The audience for this document are:

- The Apprentice
- Their Supervisors and Mentors and the relevant departments in the host company
- SOLAS Authorised Officers

Please note this manual should be read in conjunction with the following documents;

- Guide for Apprentices
- Guide for Supervisor/Mentors
- Guide to Case Studies
- SOLAS Authorised Officer Handbook

Work Based Assessment Process

Apprentices are assessed in one or more of the core competencies of Underwriting, Claims, Direct Client advice and Financial Advice depending on their employer's business activities.

Apprentices will be required to have their Supervisor sign off on benchmark work related competencies & tasks using the framework provided during the semester and their Mentor will be required to sign off a review with the Apprentice at the end of each semester(December, June and August).

The following is a list of the assessments required:

- **Reflective diary** of the work based learning to be completed by the apprentice either monthly or end of semester as instructed by the Programme Manager (signed off by the Supervisor and uploaded to Moodle).
- **Case Studies to be completed and submitted by the apprentice** (signed off by the Supervisor every three weeks in year 1 and year 2 and uploaded to Moodle).
- **Tasks** completion and submission (signed off by the Supervisor and uploaded to Moodle) as per the semester calendar provided in year 1 and year 2.
- **Work practice assessment** of the work based core competencies (signed off by the Supervisor at the end of each semester based on a successful assessment of apprentice performance and uploaded to Moodle).
- **Review with Mentor** (to be completed with your Mentor at the end of each semester and uploaded to Moodle).

Reflective Diary

The apprentice will maintain a reflective diary, which is completed and signed by the apprentice and their Supervisor, scanned and uploaded to Moodle (the IT Sligo learner management system).

See **Appendix 1**.

The reflective learning diary is **NOT** a work log or diary in which the apprentice itemises and records events or work tasks. Rather, it should be used as a reflective 'tool', which will help apprentices to think about what was learned from a work task, customer interaction etc. The apprentice should also look at how they can learn from it i.e. how they might handle it better in the future. This reflection exercise may include how the apprentice would approach the work task, event etc. differently the next time it happens or how it increased their understanding of a particular concept.

Examples of potential inclusion in the diary are:

- Attending a meeting
- Attending training
- Observing colleagues
- Feedback from Coaching & Mentoring sessions.

This list is not exhaustive.

The aim is that the apprentice will reflect on activities where key learning has taken place, and should always be aligned to the required skills, knowledge and behaviours of the insurance apprentice. This will also support the apprentice getting into the habit of continuous professional development. The reflective diary will also be an opportunity to record feedback from others via email, recordings or statements.

The diary is a way of allowing apprentices to develop their ability to reflect - to step back from their learning experience, help them develop critical thinking skills and improve on future performance by analysing their experience.

Apprentices will find keeping a reflective diary less of a chore if they take a few minutes at the end of each week to make observations, record thoughts and ideas and then attempt to analyse those experiences.

Case Study Assessments (Insurance Modules only)

The purpose of the case studies is to ensure that each apprentice has the opportunity to apply the academic principles learned in the Professional Diploma in Insurance (CIP) or the Qualified Financial Adviser (QFA) modules in a practical work environment, bridging the gap between theory and practice.

See the **Appendix 2** for example of a case study marking record.

A separate **Guide to Case Studies** (both General and Life Insurance) should be read in conjunction with this manual.

Work Based Learning Tasks

The purpose of the work based learning (WBL) tasks are to provide the apprentice with the opportunity to enhance their learning and development of topics not covered by the case studies. The tasks provide a practical opportunity to learn about their organisation, industry, profession and academic journey.

See the **Appendix 3** for an example of the task completion report form.

ROLES

The Role of the Apprentice

- Turn up each day
- Work on job allocated tasks for 4 days per week
- Do online study lectures and case study & task preparation 1 day per week
- Choose and complete an Insurance module case study over 3 weeks
- Keep a reflective diary
- Complete all WBL tasks
- Have assessment forms signed off at the end of each semester
- Have access to own computer/laptop outside working hours
- Do weekly self-study – it is recommended that you complete 8-10 hours of self-study per week
- Ensure the necessary assessments and forms are signed off and uploaded to Moodle as per the deadline provided in the semester calendar.

The Work Supervisor

- Day to day supervision of the apprentice within a team environment by shadowing, coaching, observing and guiding
- Ensure the apprentice is trained in work practices
- Ensure apprentice attends online sessions
- Manage the daily work allocated to the apprentice and monitor their performance per semester using the framework provided
- Mark case study assessments to confirm the achievement of learning outcomes

- Complete task report form to confirm that apprentice has completed the WBL task
- Ensure the apprentice uploads all work tasks to Moodle as per the timetable supplied
- Hold regular face-to-face/online meetings with the apprentice to discuss their progression and achievements
- Sign off a work practice assessment of the work based core competencies at the end of each semester based on a successful assessment of apprentice performance. A copy of the relevant form is available on your insurance practice Moodle page.
- Report concerns regarding apprentice to IT Sligo/III/LIA

The Work Mentor

- Support, guide and mentor the apprentice(s)
- Act as liaison with IT Sligo and Insurance Institute/LIA delivering the programme
- Arrange job/team/task rotations
- Hold regular face-to-face/online meetings with the apprentice to discuss their progression and achievements and discuss outcome with the Supervisor
- Complete a Mentor end of semester report with the apprentice. A copy of the Mentor Report form is available on your insurance practice Moodle page.

Role of the Apprentice's Programme Managers - IT Sligo and The Insurance Institute/LIA)

- Communicate with the apprentice regarding progress in achieving learning objectives
- Liaise with the Work Supervisor in relation to the learning aspects of the placement
- Oversee the assessment process (the completion of the associated documentation)
- The Programme Managers will fulfil the above in the context of a visit or call to each apprentice in the workplace.

These visits/calls typically will have the following format:

- Meeting with the Work Mentor and Supervisor to consider placement content and apprentice progress and assess grades
- Meeting with apprentice(s) on a one to one basis
- Meeting with apprentice and supervisor if required
- General meeting with all mentors and apprentices to discuss general issues.

Role of the SOLAS / ETB Authorised Officers

The ETB Authorised officers have a statutory function in relation to the approval of employers, the registration of the apprentices and the protection of the apprentice. The Authorised Officers, in addition to visiting the place of employment to approve the employer will also conduct ongoing monitoring visits under their statutory roles.

APPENDIX ONE

WORK BASED LEARNING REFLECTIVE DIARY

Apprentice Name: _____

IT Sligo Student Number : _____

Company : _____

Department (If applicable) : _____

Calendar Month / Semester Commencing: _____

This diary is to be completed and uploaded to Moodle on a monthly/end of semester basis as per the deadlines on your semester calendar.

Question	Response
What have been your main roles in the past month/semester?	
Other than IT Sligo coursework have you undertaken any formal training?	
What were your main achievements this month/semester?	
What are your main personal strengths in your main role?	

What was your key learning in this month/semester?	
Thinking back on the month, what are your key thoughts on the month/semester?	
Are there any areas for improvement and if so have you any plans to achieve this improvement?	

Signed _____ Date:- _____
Apprentice

=====

This section is for use by your supervisor.

Comments (if any):-

Signed _____ Date _____

Supervisor

Date uploaded to Moodle:- _____

APPENDIX TWO

Case studies

PLEASE REFER TO THE SEPARATE GUIDE FOR CASE STUDIES (BOTH GENERAL AND LIFE).

See below for Case Study Marking Form



The
Insurance
Institute



CASE STUDY MARKING FORM

Topic No. Topic Title Insurance Module

Learning Outcome:

Checklist:

Attempt 1	Attempt 2	Attempt 3
Pass/Fail	Pass/Fail	Pass/Fail

Signed ----- (Supervisor) Date -----

All the work on the case studies is my own work.

Signed ----- (Apprentice) Date -----

Apprentice Number _____

Date scanned copy and completed case study uploaded to Moodle

Date -----

APPENDIX 3 – Task Completion Report Form



TASK COMPLETION REPORT FORM

Task No. Task Title

Please outline below your answer to the task or attached a separate document to this form.

Note: Expected word count is 500-1000 words.

Checklist to be completed by your supervisor:

Task Complete – (please tick as appropriate)	Yes	No
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Signed ----- **(Supervisor)** Date -----

All the work on this task is my own work:

Signed ----- **(Apprentice)** Date -----

Student/Apprentice Number _____

Once your supervisor has confirmed that you have completed the task, scan and upload this form and any supporting documents to Moodle.