


## Local Institute Manual

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The Institute Liaison function operated from 1992 until 2006 when the Manager reached the CII's retirement age.

As from 1 July 2006 the tasks previously handled by Institute Liaison were divided among the various departments in accordance with the following list.

### CII Contact Points following transfer from Institute Liaison effective from 1 July 2006


Activity	Contact	Location
<b>ADDRESS LABELS</b>		
Orders for name and address labels	Mary Reynolds / Justin Thomas	Customer Service, South Woodford
<b>ANNUAL CHURCH SERVICE</b>		
Organisation	Peter Hutchinson	Aldermanbury
Queries	Peter Hutchinson / Maree Hall	Aldermanbury
<b>ANNUAL CONFERENCE</b>		
General enquiries	Steve Wellard / Events Team	Marketing / Aldermanbury
LI officer discounts	Steve Wellard / Events Team	Marketing / Aldermanbury
<b>ANNUAL DINNERS</b>		
<b>Orders for place cards and menu covers</b>	Maree Hall or on-line via CII website	Secretariat, Aldermanbury
<b>Procedures</b>		
Issuing of forms to obtain dinner dates / locations etc	Maree Hall	Secretariat, Aldermanbury
Updating of annual dinners lists	Maree Hall	Secretariat, Aldermanbury
Issuing of guidelines	Maree Hall	Secretariat, Aldermanbury
Allocation of CII Representatives	Rowan Paterson	Secretariat, Aldermanbury
Feedback Forms to be returned to	Maree Hall	Secretariat, Aldermanbury
Contact with details of events in local institute area and other	Allocated CII Representative direct	CII Representative's address

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relevant institute and dinner details to be sent by LI Dinner Secretary to		
Updating of CII Representatives dinner attendance in control book	Maree Hall	Secretariat, Aldermanbury
<b>ANNUAL GENERAL MEETING</b>		
General enquiries – CII	Rowan Paterson, Caroline Jeffery, Katie Arnold	Secretariat, Aldermanbury
Copies of LI AGM minutes to be sent to	Maree Hall	Secretariat, Aldermanbury
<b>ANNUAL RETURNS OF LOCAL INSTITUTE ACCOUNTS</b>		
Copy accounts to be sent to	Shyama Preston / Ian How	Finance, Aldermanbury
<b>ANNUAL RETURNS OF LOCAL INSTITUTE AGM MINUTES</b>		
Copies of minutes and officer reports to be sent to	Maree Hall	Secretariat, Aldermanbury
<b>ANNUAL RETURNS OF ELECTED LI OFFICERS</b>		
Issue of annual return forms	Maree Hall	Secretariat, Aldermanbury
Input of new details	Maree Hall	Secretariat, Aldermanbury
Input of changed LI elected officer details	Maree Hall	Secretariat, Aldermanbury
Communication of new / changed LI officer details for updating of contact lists at Customer Service	Maree Hall	Secretariat, Aldermanbury
Issue of letters relating to Senior Membership	Maree Hall	Secretariat, Aldermanbury
Advice to Customer service to amend membership grade	Maree Hall	Secretariat, Aldermanbury
Maintenance of records relating to Permanent Office addresses / contact details	Maree Hall	Secretariat, Aldermanbury
<b>ANNUAL RETURNS OF ELECTED CII OFFICERS, COUNCIL AND COMMITTEE MEMBERS</b>		
Input of new / amended details	Katie Arnold	Secretariat,

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		Aldermanbury
<b>APPLICATIONS FOR AFFILIATION TO THE CII</b>		
Response to initial enquiry	Rowan Paterson	Secretariat, Aldermanbury
Initial assessment of application	Rowan Paterson	Secretariat, Aldermanbury
Confirmation or rejection of suitability of applicant's constitution	Rowan Paterson	Secretariat, Aldermanbury
Submission to The Council	Rowan Paterson	Secretariat, Aldermanbury
Submission to AGM	Rowan Paterson	Secretariat, Aldermanbury
Final advice to applicant	Rowan Paterson	Secretariat, Aldermanbury
Advices to Customer Service for inclusion in Affiliated Institute database listings	Rowan Paterson	Secretariat, Aldermanbury
Advices to Distribution for inclusion in distribution listings for The Journal and other publications	Rowan Paterson	Secretariat, Aldermanbury
Advices to marketing for inclusion in website, all examination and other publications	Rowan Paterson	Secretariat, Aldermanbury
<b>APPLICATIONS FOR ESTABLISHMENT OF NEW LOCAL INSTITUTES</b>		
Initial verifications	Rowan Paterson	Secretariat, Aldermanbury
Contact with neighbouring institutes as regards boundaries and name of new institute	Rowan Paterson	Secretariat, Aldermanbury
Allocation of Regional voting constituency and Regional Council area	Rowan Paterson	Secretariat, Aldermanbury
Advice to The Council	Rowan Paterson	Secretariat, Aldermanbury
Advice to Customer Service, Distribution, marketing and other CII Departments	Rowan Paterson	Secretariat, Aldermanbury
<b>ARCHIVES</b>		
CII Historical artefacts	Pauline Beachcombe / Peter Hutchinson	Aldermanbury
General enquiries	Sam Crown / Library	Information services,

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	Staff	Aldermanbury
General memorabilia	Peter Hutchinson / Pauline Beachcombe	Aldermanbury
LI memorabilia	Peter Hutchinson	Aldermanbury
Pre-1989 Examinations, Membership, Tuition, VIP records	Rebecca Fletcher, Julie Hill, Toby Beaver	Customer Service, South Woodford
Regalia	Peter Hutchinson	Aldermanbury
AWARDS		
<i>CII Awards / Awards Panel</i>		
Initial Communication to LI presidents	Maree Hall / Rowan Paterson	Secretariat, Aldermanbury
Collation of nominations	Maree Hall	Secretariat, Aldermanbury
Inclusion of additional (CII) information	Maree Hall / Rowan Paterson	Secretariat, Aldermanbury PLUS assistance from Customer Service re-Daphnis and Microfiche records
Compilation and numbering of packs	Maree Hall	Secretariat, Aldermanbury
Chairman's notes	Rowan Paterson	Secretariat, Aldermanbury
Collection of packs / declarations	Maree Hall	Secretariat, Aldermanbury
Formal notification to recipients	Maree Hall	Secretariat, Aldermanbury
Initial advice to presidents of successful nominating institutes	Rowan Paterson	Secretariat, Aldermanbury
Notification to Director General	Rowan Paterson	Secretariat, Aldermanbury
Notification to Public Relations	Rowan Paterson	Secretariat, Aldermanbury
Chairman's notes – Council announcement	Rowan Paterson	Secretariat, Aldermanbury
Advice to nominating institutes	Rowan Paterson / Maree Hall	Secretariat, Aldermanbury
<i>Constitutional Awards</i>		
Advice re local institute awards e.g. Honorary Vice President for Life	Rowan Paterson / Maree Hall	Secretariat, Aldermanbury
Preparation & issue of Certificates	Maree Hall	Secretariat, Aldermanbury
Long service awards	Rowan Paterson	Secretariat, Aldermanbury

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<b><i>Local Institute medals awards</i></b>		
Consideration of design	Peter Hutchinson	Aldermanbury
Manufacturing arrangements	Peter Hutchinson / Maree Hall	Aldermanbury
Preparation of certificates	Maree Hall	Secretariat, Aldermanbury
<b>CONSTITUTIONAL MATTERS</b>		
<b><i>CII Charter &amp; Bye-laws</i></b>		
Interpretation / Queries	Rowan Paterson, Caroline Jeffery, Katie Arnold	Secretariat, Aldermanbury
<b><i>Local Institute</i></b>		
Authorisation / checking	Rowan Paterson, Caroline Jeffery, Katie Arnold	Secretariat, Aldermanbury
Advice to LIs re-proposed local changes	Rowan Paterson, Caroline Jeffery, Katie Arnold	Secretariat, Aldermanbury
Advice to LIs re-proposed general changes (eg those required as a result of changes at The CII or The Insurance Charities)	Rowan Paterson, Caroline Jeffery, Katie Arnold	Secretariat, Aldermanbury
General queries	Rowan Paterson, Caroline Jeffery, Katie Arnold	Secretariat, Aldermanbury
<b>CONTINUING PROFESSIONAL DEVELOPMENT</b>		
Advice re lectures	Rowan Paterson / Maree Hall	Secretariat, Aldermanbury
Advice re-programmes at other institutes	Rowan Paterson / Maree Hall	Secretariat, Aldermanbury
Advice re-CPD records	Clare Beadle/ Esther Roche	Secretariat, Aldermanbury
Assessment of CPD logs	Clare Beadle/ Esther Roche	Secretariat, Aldermanbury
Submission of CPD logs	Clare Beadle/ Esther Roche	Secretariat, Aldermanbury
<b>DATA PROTECTION</b>		
LI registration	Rowan Paterson, Caroline Jeffery	Secretariat, Aldermanbury
Applicability, interpretation and all matters relating to the CII's various registrations	Rowan Paterson, Caroline Jeffery	Secretariat, Aldermanbury

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<b>DISSOLUTION OF LOCAL INSTITUTES</b>		
Constitutional advice	Rowan Paterson	Secretariat, Aldermanbury
Initial contact with LI membership	Rowan Paterson	Secretariat, Aldermanbury
Arrangements for label production	Sarah Money / Mary Reynolds/Justin Thomas	Customer Service, South Woodford
Review / adjustment of Regional Constituency grouping in the event of dissolution	Rowan Paterson	Secretariat, Aldermanbury
Revised allocation of boundary areas	Rowan Paterson	Secretariat, Aldermanbury
Revised allocation of Regional constituencies	Rowan Paterson	Secretariat, Aldermanbury
<b>GRANTS TO LOCAL INSTITUTES</b>		
<b><i>Annual grants</i></b>		
Calculation of annual grants	Ian How	Finance, Aldermanbury
Queries re-annual grants	Ian How	Finance, Aldermanbury
Tracking of grant payments	Jackie Rushton	Finance, Aldermanbury
<b><i>Special grants</i></b>		
Issue of annual letter to LI treasurers	Shyama Preston / Ian How	Finance, Aldermanbury
Applications to be sent to	Shyama Preston / Ian How	Finance, Aldermanbury
Initial assessment of applications	Ian How	Finance, Aldermanbury
Compilation of all applications	Ian How	Finance, Aldermanbury
Final decisions re applications	CII Treasurer / CII Group Finance Director / CII Accountant / LI Grants Committee	Finance, Aldermanbury
<b>GUIDANCE / TRAINING OF LOCAL INSTITUTE OFFICERS</b>		
Accounting matters	Shyama Preston / Ian How	Accounts, Aldermanbury
Administration matters	Rowan Paterson / Maree Hall	Secretariat, Aldermanbury
Constitutional	Rowan Paterson	Secretariat, Aldermanbury
Examinations		
– Administration	Customer Service	Customer Service, South Woodford
– Exam Centres	Dawn Wilkinson	Examinations, Aldermanbury
– Exemptions	Chris Kennedy	

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General	Customer Service	Customer Service, South Woodford
Membership	Martin Reid	Membership Services, Ald.
Officers' duties	Rowan Paterson / Maree Hall	
Protocol	Rowan Paterson	Secretariat, Aldermanbury
Tuition <ul style="list-style-type: none"> <li>• Tutors / Authors</li> </ul>	Learning Solutions	Learning Solutions, Aldermanbury
<b>INSURANCES</b>		
<b><i>CII</i></b>		
Claims	Peter Hutchinson	Aldermanbury
Contact with Brokers / Insurers	Peter Hutchinson	Aldermanbury
Initial Renewal negotiations	Peter Hutchinson	Aldermanbury
Issue of Employers' Liability Certificates	Peter Hutchinson	Aldermanbury
Issue of Motor Certificates	Peter Hutchinson	Aldermanbury
Issue of Travel Medical Cards & Guidelines	Peter Hutchinson	Aldermanbury
<b><i>Local Institutes</i></b>		
Allocation of premiums	Peter Hutchinson	Aldermanbury
Claims	Peter Hutchinson	Aldermanbury
Issue of Employers' Liability and other Certificates	Peter Hutchinson	Aldermanbury
Renewal cheques to be sent to	Peter Hutchinson	Aldermanbury
<b>LOCAL INSTITUTE EVENTS</b>		
Assistance with CII Representatives at annual dinners	Rowan Paterson / Maree Hall	Secretariat, Aldermanbury
Assistance with 'last man on' at dinners	Maree Hall, Tracy Wood	Secretariat / Events, Aldermanbury
Assistance with technical speakers	Steve Wellard / Tracy Wood	Marketing / Events, Aldermanbury
Ideas for LI events	Tracy Wood, Events Team	Events, Aldermanbury
Officers' Conference from 2007	Steve Wellard / Tracy Wood	Marketing / Events, Aldermanbury
Preparation of annual speaker & topic lists from LI programmes / websites	Maree Hall	Secretariat, Aldermanbury
Speaking in Public workshops	Martin Reid	Membership Services, Ald.
Tours of Aldermanbury plus presentations	Membership Marketing / Events	Aldermanbury

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	Team / Pauline Beachcombe, Debra Willson	
<b>LOCAL INSTITUTE MANUAL</b>		
Additional sections	Peter Hutchinson	Aldermanbury
Updating of existing sections	Peter Hutchinson	Aldermanbury
Inclusion of sections on CII website	Audra Wilson-Max	Marketing, Aldermanbury
<b>LOCAL INSTITUTE PROGRAMMES</b>		
Advice re-topics	Martin Reid, Steve Wellard Rowan Paterson / Maree Hall PFS Events team	Marketing, Aldermanbury Secretariat, Aldermanbury PFS, Aldermanbury
Preparation of annual speaker & topic lists from LI programmes / websites	Maree Hall	Secretariat, Aldermanbury
Publication of details / events in Network News	Steve Radford, Alex Thompson	Marketing, Aldermanbury
<b>LOCAL INSTITUTE STATISTICS / SPECIAL QUERIES / LABEL RUNS</b>		
Examination / Membership statistics	Mary Reynolds / Justin Thomas	Customer Service, South Woodford
Labels for AGM / programme issue	Mary Reynolds / Justin Thomas	Customer Service, South Woodford
Tuition labels	Mary Reynolds / Justin Thomas	Customer Service, South Woodford
<b>NETWORK NEWS</b>		
Submission of articles from LIs	Steve Radford / Alex Thompson	Public Relations, Aldermanbury
Inclusion of CII News	Steve Radford / Alex Thompson	Public Relations, Aldermanbury
<b>OFFICERS' CONFERENCE</b>		
Officers' Conference from 2007	Steve Wellard / Tracy Wood / Events Team	Marketing / Events, Aldermanbury
<b>PROJECT RENAISSANCE</b>		
General advice on the project,	Martin Reid	Membership Marketing,

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updates etc.		Aldermanbury
<b>REGALIA</b>		
CII Officer regalia	Peter Hutchinson	Aldermanbury
Exceptional Service Medals and other items	Peter Hutchinson	Aldermanbury
Local Institute regalia	Peter Hutchinson	Aldermanbury
LI Past president badges	Peter Hutchinson / Maree Hall	Aldermanbury
Repairs	Peter Hutchinson	Aldermanbury
<b>SERVICING OF COMMITTEES</b>		
Awards Panel	Rowan Paterson / Maree Hall	Secretariat, Aldermanbury
Local Institute Grants Committee	Shyama Preston	Finance, Aldermanbury
Local Institute Development Committee	Rowan Paterson / Maree Hall	Secretariat, Aldermanbury
Other Committees	Rowan Paterson, Caroline Jeffery, Katie Arnold	Secretariat, Aldermanbury
<b>SPEAKING IN PUBLIC COURSES</b>		
Advice and information	Martin Reid	Membership Marketing
<b>STATIONERY</b>		
Letterheads, compliment slips etc.	Audra Wilson-Max	Marketing, Aldermanbury
Orders for place cards and menu covers	Maree Hall or on-line via CII website	Secretariat, Aldermanbury
<b>STATISTICS</b>		
Assessment and label runs	Donna Bathgate	Marketing, Aldermanbury
<b>VISITS</b>		
<b>To CII</b>		
LI Group visits (CII only or CII plus Lloyd's)	Membership Marketing / Events Team / Pauline Beachcombe	Aldermanbury
<b>By CII</b>		
Regional Councils ( <b>on invitation only</b> )	Martin Reid / Relevant Business Development Manager / Secretariat	Membership Services / BDM Team Aldermanbury

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Local Institute council meetings <b>(on invitation only)</b>	Rowan Paterson / Relevant BDM	Secretariat, Aldermanbury / BDM team Aldermanbury
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