

Aspire Apprenticeship Programmes



Our Approach

Why are the Aspire Apprenticeship Programmes right for my business?

- Aspire makes it easy for employers with small numbers of apprentices (or even just the one) to access apprenticeship training that is usually prohibitive with low numbers
- For larger firms it removes the need for detailed and time-consuming procurement discussions with Training Providers - we've considered the detail for you
- It's open to all employers across the profession in the UK - large or small
- Apprenticeship levy and co-investment funding arrangements are both catered for*
- It provides standardised training across insurance and financial planning apprenticeship standards/frameworks
- It offers a choice of 'face to face' or 'live online learning' training depending upon the preferred learning style of the apprentice
- A simple online 'expression of interest' gets the registration process started - Visit www.cii.co.uk/apprenticeships to register an interest for your business

**NB: There is no levy or co-investment funding available to employers from the devolved administrations in Scotland or Northern Ireland. The Aspire Apprenticeship training is still accessible to employers in these countries but commercial prices apply. 100% funding is available to all employers in Wales (subject to eligibility).*





Why should I use this training?

- Your business (no matter how small) gets **easy access** to nationwide insurance & financial planning apprenticeship training programmes through simple online registration.
- You get **complete reassurance** from knowing that only those training providers with proven expertise of delivering the best training for the apprenticeship standards they offer are selected by the Chartered Insurance Institute to be part of the Aspire Apprenticeship Programmes – saving you the hassle of having to do this yourself.
- Rolling training programmes (three in-takes each year) make it **simple and convenient** for you to get your apprentices up and running quickly on their relevant apprenticeship standard.

What are the insurance and financial planning apprenticeship standards offered across the UK?

Insurance & Financial Planning Apprenticeships

RELEASE 1

 APPRENTICESHIP STANDARDS	 APPRENTICESHIP FRAMEWORKS	 APPRENTICESHIP FRAMEWORKS	 APPRENTICESHIP FRAMEWORKS
<p>Insurance</p> <p>INSURANCE PRACTITIONER (L3)</p> <p>INSURANCE PROFESSIONAL (L4)</p> <p>SENIOR INSURANCE PRACTITIONER (L6)</p> <p>Financial Planning</p> <p>FINANCIAL SERVICES ADMINISTRATOR (L2)</p> <p>FINANCIAL ADVISOR (L4)</p> <p>PARAPLANNER (L4)</p> <p>General Financial Services</p> <p>FINANCIAL SERVICES CUSTOMER ADVISOR (L2)</p> <p>SENIOR FINANCIAL SERVICES ADVISOR (L3)</p> <p>Mortgages</p> <p>MORTGAGE ADVISOR (L3)</p> <p>Compliance/Risk</p> <p>COMPLIANCE/RISK OFFICER (L3)</p> <p>SENIOR COMPLIANCE/RISK SPECIALIST (L6)</p> <p>Pensions</p> <p>WORKPLACE PENSIONS ADMINISTRATOR OR CONSULTANT (L3)</p> <p>Banking</p> <p>RELATIONSHIP MANAGER BANKING (L6)</p>	<p>Insurance</p> <p>FOUNDATION APPRENTICESHIP IN PROVIDING FINANCIAL SERVICES: General Insurance Pathway (L2)</p> <p>APPRENTICESHIP IN PROVIDING FINANCIAL SERVICES: General Insurance Pathway (L3)</p> <p>HIGHER APPRENTICESHIP IN INSURANCE: Team Leader Pathway (L4)</p> <p>HIGHER APPRENTICESHIP IN INSURANCE: Technician Pathway (L4)</p> <p>Financial Planning</p> <p>There are currently no specific Financial Planning apprenticeship frameworks available in Wales</p>	<p>Insurance</p> <p>PROVIDING FINANCIAL SERVICES (L2)</p> <p>PROVDING FINANCIAL SERVICES (L3)</p> <p>TECHNICAL APPRENTICESHIP IN INSURANCE (L4)</p> <p>Financial Planning</p> <p>There are currently no specific Financial Planning apprenticeship frameworks available in Northern Ireland</p>	<p>Insurance</p> <p>There are currently no specific Insurance apprenticeship frameworks available in Northern Ireland</p> <p>Financial Planning</p> <p>There are currently no specific Financial Planning apprenticeship frameworks available in Northern Ireland</p>

What insurance and financial planning apprenticeship training standards are provided by Aspire?

It is our intention to roll out as many of the insurance and financial planning apprenticeship standards/frameworks (see answer to the previous question) across the UK* on a phased basis in line with employer demand.

We've started with the most popular insurance and financial planning standards (see below) but you can help determine which programmes are contained in our Release 2 by telling us know which apprenticeship standards/frameworks are most relevant for your business by emailing us at apprenticeships@cii.co.uk

Release 1 sees us initially focus on the following apprenticeship programmes, which all have in-takes in September 2018:

England

1. Insurance Practitioner (Level 3)
2. Insurance Professional (Level 4)
3. Financial Adviser (Level 4)

Wales

1. Foundation apprenticeship in providing financial services: **General Insurance Pathway** (Level 2)
2. Apprenticeship in providing financial services: **General Insurance Pathway** (Level 3)
3. Higher apprenticeship in insurance: **Team Leader Pathway** (Level 4)
4. Higher apprenticeship in insurance: **Technician Pathway** (Level 4)

Scotland*

1. Providing Financial Services (L2)
2. Providing Financial Services (L2)
3. Technical Apprenticeship in Insurance (L4)

Northern Ireland*

1. There are currently no specific Insurance apprenticeship OR Financial Planning frameworks available in Northern Ireland

Visit www.cii.co.uk/apprenticeships to register an interest for your business

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What if I only have 1 apprentice in my business?

- Aspire makes it easy for employers with small numbers of apprentices (or even just the one) to access apprenticeship training that is usually prohibitive with low numbers
- It's open to all employers across the profession in the UK and co-investment funding arrangements are catered for*
- A simple online 'expression of interest' gets the registration process started

****NB: There is no levy or co-investment funding available to employers from the devolved administrations in Scotland or Northern Ireland. The Aspire Apprenticeship training is still accessible to employers in these countries but commercial prices apply. 100% funding is available to all employers in Wales (subject to eligibility).***

I thought Aspire was just for financial advisers?

- The Personal Finance Society's financial adviser development programme previously known as Aspire has been incorporated into the Aspire Apprenticeship Programmes, which now caters for the whole insurance and financial planning profession.
- This training is still very much available and the Financial Adviser (Level 4) apprenticeship training is an integral part of our release 1 which has a September 2018 in-take.
- The other financial planning apprenticeship training programmes will be rolled out in line with employer demand.
- Visit www.cii.co.uk/apprenticeships to register an interest for your business

Signing Up

How do I sign up my apprentice(s)?

- Simply visit www.cii.co.uk/apprenticeships and complete the expression of interest form.
- The form is designed to be easy to complete and only takes a few minutes depending upon how many apprentices you want to register.

What is involved in signing up?

There are three simple steps to enrol your apprentices to start their learning journey

1. **Register** – Complete the expression of interest form at www.cii.co.uk/apprenticeships.
2. **Application** - An approved training provider will contact you to discuss how:
 - > Aspire Apprenticeships Programmes can work for your business
 - > what support is required from you as an employer
 - > and to talk to the nominated apprentice(s).

Following these conversations an application form will need to be completed by the apprentice(s).
3. **Onboarding** – Successful apprentices are placed into regional cohorts and are ready to be enrolled and start their training programme. T&Cs and funding arrangements are finalised between the training provider and your business. Rolling in-takes run throughout the year, starting in January, May and September.

What is the commitment/what will be expected of employers?

- As an employer you will be expected to support your apprentice to attend 20% off-the-job training within their normal working hours across the duration of the apprenticeship. Off-the-job training is time spent learning which will contribute to the development of an apprentice's skills, knowledges and competencies and can be delivered in the form of online training, shadowing, mentoring, research, writing assignments etc.
- Your allocated training provider will work with you as the employer to identify how you can contribute towards off-the-job training.
- As an employer it is also best practice to assign a mentor to support with ongoing learning, this can be, but doesn't have to be, a direct line manager but should be someone who can assist during the apprenticeship and be available to support learning.
- There is also an expectation to attend regular review meetings and provide feedback on the apprentice's progress.

Costs in involved

How much will it cost my business?

- The cost of the apprenticeship training itself is standard across each of the devolved administrations; England, Wales, Scotland and Northern Ireland. For instance, in England the Insurance Practitioner (level 3) training costs £9000.
- However, how much of this cost is actually paid by an employer varies depending on whether the business pays the apprenticeship levy or not.

In England:

- Those businesses with an annual wage bill of less than £3m per year, do not pay the levy and are eligible for 90% co-funding (up to the funding band maximum) from the government. Meaning that for the Insurance Practitioner (level 3) training, an eligible employer would pay £900 rather than the full £9000.
- Non-levy paying firms will also be eligible for the additional support relating to apprentices aged 16-18 (the additional £1,000 in government funding) and those apprentices aged 19-24 who have previously been in care or has a Local Education, Health and Care plan (additional £1,000 in government funding)
- For employers with fewer than 50 people, the apprenticeship training will be 100% funded by the government, if on the first day of the apprenticeship the apprentice is aged 16-18 years old or aged 19-24 years old and has either: an education, health & care plan or has been in the care of the local authority.
- Whilst those businesses who have an annual wage bill of more than £3m per year, pay the apprenticeship levy and will need to meet 100% of the training cost from this fund.

In Wales:

- 100% funding is available to all employers in Wales (subject to eligibility).

In Scotland & Northern Ireland:

- There is no levy or co-investment funding available to employers. The Aspire Apprenticeship training is still accessible to employers in these countries but commercial prices apply.

How do I access my apprenticeship levy pot to pay for the training?

In England:

- As a levy paying employer you will need to register to set up an Apprenticeship account on the government's online 'Digital Apprenticeship Service' gov.uk website in order to access the levy funds.
- If you haven't already done this, your allocated training provider will take you through how this is done step-by-step during the onboarding process.

In Wales:

- There is no digital account equivalent of the 'Digital Apprenticeship Service' gov.uk website in Wales - instead, employers access funding directly from the training provider they use.
- Your allocated training provider will take you through how this is done step-by-step during the onboarding process.

In Scotland & Northern Ireland:

- There is no levy funding available to employers. The Aspire Apprenticeship training is still accessible to employers in these countries but commercial prices apply.

How do I access government co-investment to pay for the training?

In England:

- Your allocated training provider will outline the exact steps during the onboarding process but suffice to say you will simply pay your agreed 10% contribution direct to them.
- You do not need to worry about claiming any funding – this is dealt with by the training provider.

In Wales:

- There is no co-investment funding in Wales as 100% funding is available to all employers in Wales (subject to eligibility).

In Scotland & Northern Ireland:

- There is no co-investment funding available to employers. The Aspire Apprenticeship training is still accessible to employers in these countries, but commercial prices apply.

Will I need a contract with the training provider?

- One of the many ways that Aspire Apprenticeships makes it easy for employers to access apprenticeship training is by removing the need for detailed and time-consuming procurement discussions with Training Providers - we've considered the detail for you.
- As a consequence, only businesses that pay the apprenticeship levy require a short contract.
- This contract details:
 - the need for your allocated training provider to work with you in the provision of apprenticeship training
 - how you need support the apprentice, and
 - to confirm compliance in the levy draw down process
- For businesses utilising the 90% government co-investment funding, a simple commitment statement will need to be signed by the apprentice, the line manager of the apprentice, the employer and the training provider.
- This commitment statement covers:
 - a commitment to the work required to complete the apprenticeship
 - a commitment to the 20% off the job training allocation
 - details the programme including cost, start date, planned end date and route for End Point Assessment (EPA)

Training Providers

Why should I be happy using the training providers you have selected?

- You get **complete reassurance** from knowing that only those training providers with proven expertise of delivering the best training for the apprenticeship standards they offer are selected by the Chartered Insurance Institute to be part of the Aspire Apprenticeship Programmes – saving you the hassle of having to do this yourself.
- We vary the training provider depending upon the particular insurance or financial planning apprentice standard required, location across the UK and preferred learning style of the apprentice.
- The roster of training providers used by the Aspire Apprenticeship Programmes provides coverage across England, Wales, Scotland* and Northern Ireland*.

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Apprenticeship Training

When does the training start?

- Rolling training programmes make it simple and convenient for you to get your apprentices up and running quickly on their relevant apprenticeship standard.
- We run three in-takes each year starting in January, May and September.
- In addition, we run multiple cohorts in each in-take for every apprenticeship standard offered, meaning that our 'in-take capacity' for apprentices across the UK is high.

How will learning take place?

- It will take the form of work-based learning with tutorial support to achieve both the apprenticeship standard/framework and the selected qualification.
- Your allocated training provider will provide you with tailored in-depth programme materials during the onboarding process which will detail the full learning programme and timings but the learning support provided by the Aspire Apprenticeship Programmes will typically include:
 - Regular contact – to monitor progression CPD
 - Employer interaction through 1-2-1 and 360 feedback all supported by robust CPD and regular checkpoints
 - Directed self-study with study support
 - Study groups/ workshops where appropriate
 - Face to face or live online learning delivery
 - Use of technology to support and engage learner, manage progression and achievement through an online e-portfolio management tool

How is the training delivered?

- Aspire Apprenticeship Programmes offers two distinct learning delivery models to suit the preferred learning style of the apprentice, namely (i) traditional face to face learning or (ii) live online learning.
- You simply select the preferred learning styles for your apprentices when submitting the expression of interest forms

Traditional Face to Face Learning	Live Online Learning	Supporting Digital Content
Induction	Induction	Video
Workshops	Webinars	Tests
1-2-1 coaching	Chat rooms	Thought leadership material
	Skype	
	Telephone	
	Workshops	

Note:

Some face to face workshops may delivered in the Live Online Learning model as part of the 20% off-the-job learning allocation

How is the 20% 'off-the-job' training achieved?

- Apprentices will receive the Government set, 20% 'off-the-job' training throughout their Apprenticeship which will include a mix of:
 - business related project work
 - workshops and seminars
 - group activities and learning
 - webinars
 - interactive e-learning
 - coaching and mentoring
 - personal development planning
 - online study materials

- Where there are opportunities to adopt project based approaches to development, the allocated training provider will agree the scope of the project activity with the business, line manager and learner.

- Throughout the programme, the allocated training provider will create opportunities for peer networking, through face to face workshops and activities, as well as digitally, via online forums, tutorials and social media networking.