**ANNUAL SUB-COMMITTEE REPORTS 2021-2022**

**President’s Report**

Andy Dakin

Firstly, I would like to welcome all, not least our new colleagues from the Blackburn and Burnley council. This is of course not the circumstances that we would want, however please be assured that you will be welcomed with open arms, and we look forward to the ideas you can bring to the council. And between us, we will do our very best to support your membership/the combined membership.

It has been a genuine honour to represent the Insurance Institute of Bolton in the capacity of President over the last 24 months, although being honest, the impacts of the wider world dictated that the period was not as I had initially envisaged, due of course to covid. That said, I have really enjoyed the time, I have learnt plenty and I believe the role has helped me develop. I am more than happy to talk to anyone in relation to this who may be interested in progression to President.

We are all very aware of the personal and professional challenges which have been presented by Covid and the local institute and supporting council situation has been no different. The vast majority of our annual programme has historically been of a face-to-face nature, from round table council meetings to welcoming guests to regional conferences. All of this, and everything in between had to be adapted during recent history and our adaptation is something I am extremely proud of. Equally, the learnings we have made for this, I am confident will make our offering more flexible and more accessible as we move forward, which is very much aligned to the overriding CII ethos, but also our own which was documented a couple of years ago.

On reflection of not just the last 12 months, but actually the last 2 years, my first point of reference is to say a heartfelt thank you to our fantastic council members, who all voluntarily to give up their time to support our local members and harvest an annual programme consisting of numerous social events, sound quality and relevant CPD sessions, whilst also actively promoting our industry to some of the younger members of the community, who are considering their own career paths. With the new way of working for many employers I know that many of us are actually working longer hours than ever, so to give up some of that precious free time, is something I am grateful for, and I know I can also speak on behalf of Phil in relation to this as we move forward.

Given the circumstances, I am absolutely delighted as to how we have adapted to the challenges faced and how readily we were able to take our proposition ‘online.’ I believe I am accurate in saying that our annual CPD programme has been the most well attended on record and the virtual nature of this is something which we will embrace as we move forward, whilst providing a new look hybrid approach to CPD, very possibly including our own regional CPD conference later in the year, which when undertaken previously, was a massive success. We were fortunate enough to be able to run our annual Golf Day twice between lockdowns and this is an event which we wish to build on and further extend this year. From a careers perspective, we have significantly increased our reach and breadth of awareness raising in relation careers to our industry. With the assistance of our new council members, we will now be able to do this still further. Our council have worked closely with the CII and their Education Partnerships Manager, aligned to their objective of promoting careers in Insurance. We have provided numerous webinar presentations and professional career discussions and interviews to educational institutions across the North-West of the country and this will continue as we move through 2022, including the now in person career events which have commenced, having recently visited Canon Slade and Bolton School. It has been discussed that this year we should improve the quality and visibility of our careers roadshow pack, and this is something which I am more than happy to support.

This is all underpinned by our most recent audit score, where we were only a single mark off 100% score and for the year, we have been the single highest contributor to the insurance charities from a fiscal perspective and per capita. Again, something we should be extremely proud of.

Well done everyone!!

Areas of particular focus for us during 2022/3 and beyond are the creation of a meaningful young member’s society (which we had to put on hold due to covid but will start up at our upcoming summer event), a regional CPD day event for our members, new and improved careers roadshow and a hybrid approach to our CPD proposition. You never know, we might even get an annual dinner….

Over the coming 12 months, we will of course have to remain flexible to the challenges of the outside world, however we plan to build on the already great work which is undertaken year on year by the voluntary council members.

Please do contact myself or any of our members should you wish to learn more about the workings of the council and we very much welcome any prospective new members.

<https://www.localinstitutes.cii.co.uk/bolton/home/about-us/contacts/>

Finally, wishing Phil as President and Paul as his deputy the very best of luck for the upcoming year.

**Treasurer’s Report**

Dave Winterbottom &

Bob Davie

As at 31st December 2021, the local institute had funds invested on three accounts as follows: -

Current Account £17,230.04

Deposit Account (Ernest Morgan Fund) £879.49

Charities Account £2002.03

 **£20,111.56**

The Current Account has reduced from £22,846 at the start of the year.

All three accounts are held at the Royal Bank of Scotland.

During the year we made a payment of £500 to the insurance charities. Due to Covid 19 we were unable to hold our annual dinner, which provides the income to our Charities Account. The council felt a donation from our account would still be appropriate given our financial position and the importance of what the work and support carried out by the charities.

Major Current Account income items were:

* Golf social event day which brought in £385 in 2021. Further costs will be received in 2022
* There was no CII Normal or Special Grant in 2021 due to Covid 19 impacting our ability to run face to face events.

On the expenditure side the major outlay not supported by any income was the Virtual Quiz at £600.

General expenditure throughout the year included insurance, eflyer costs, presidents’ expenses, auditor fees etc.

The financial outcome of the various social and Networking events during the year were: -

Virtual Quiz £600 deficit

Golf £55 deficit

As can be seen from the figures above, the local institute is finically sound, with each of the accounts being in surplus.

**Website/Social Media Report**

Shane Bennett

* New website set up much easier to use – have recently spotted the ability to send out surveys etc. which has helped L&D a lot.
* LinkedIn continuing to be used – feel this is something that still has a lot more to offer us.
* Promotional poster to help recruit for next year done – happy to help with anything similar.

**Careers/Education Report**

Paul Greenwood

Throughout 2021 we have continued to work closely with the central CII and in particular the Education Partnerships Manager, Vivine Cameron in order to promote our industry and the benefits of both CII membership and the CII qualifications.

Our focus at the start of 2021 was to build on the relationships we had developed with universities in the North West, including Bolton, Manchester Met, Salford, Cumbria and Lancaster.

Working closely with Vivine we delivered online career webinars to Lancaster University and Salford University. The webinar we delivered to Salford University was particularly well attended with approximately 177 students attending the event. The feedback from the webinars has been extremely positive with 80% of attendees confirming that before the sessions they would not have considered a career in insurance and following the sessions 50% of students stated that they now consider a career within the Insurance sector as a realistic option and a further 33% confirming that they may consider it. Thank you again to Natasha and Joanne for taking time out to support the Salford University webinar.

We have continued to work closely with Kendal Institute jointly supporting events at Lancaster and Cumbria University.

In addition to the careers webinars we also supported Lancaster University in providing students with an opportunity to undertake “mock interviews.” The sessions were designed to support 1st year students who were preparing themselves to pursue an industrial placement as part of their degree programmes. Kayleigh dedicated a considerable amount of time to this event and completed 4 mock interviews with Lancaster students and we received some really positive feedback from the University’s Career Coordinator.

More recently we have found that schools have started to open up again and we had the opportunity to attend career fairs in person. Our first careers fair was in October 2021 at Cannon Slade and was attended by Natasha and Ian.

In March 2022, myself and Natasha attended the Bolton Schools career fair along with Joanna Vickers from BIBA. It was felt that exploring joint opportunities with Joanna would help with identifying suitable events and ultimately works towards an aligned goal of promoting our industry.

Natasha is currently in contact with St Josephs to understand if there is an opportunity to attend their career event. This is via a contact made during the Bolton Careers fair.

Feedback following the careers event is that our careers roadshow pack would benefit from updating in order to help attract more students to our stand.

I would like to thank everyone that has supported the various career events over the last year.

**Sports & Social Report (inclusive of New Professionals)**

Dave Scott & Natasha Hall

It goes without saying that 2021 was another year disrupted by the Covid pandemic, so we had to be resourceful when it came to organising Sports & Social events. Despite the challenges we faced as a committee, we were still able to put on some excellent events, which brought friends and colleagues together as well as raising money for some fantastic causes.

The summer of 2021 saw Bolton CII team up with law firm, Horwich Farrelly, to bring a one-of-a-kind online quiz to our members. The quiz was hosted by none other than Shaun “The Dark Destroyer” Wallace from ITV’s quiz show, The Chase. If you haven’t watched The Chase before, Shaun is one of the shows most formidable “chasers” and he also works as a barrister, making him the perfect host for the night and he certainly didn’t disappoint. Considering by this point in 2021, most people were suffering from “online quiz fatigue” we had a fantastic turnout, helping us to further raise the profile of the CII.

Most importantly, however, we also wanted to raise some money for a worthwhile cause and it is widely known how much of an impact the pandemic has had on peoples’ mental health. As such, we decided that we would partner with the charity, Campaign Against Living Miserably (CALM). They really are a wonderful charity and do so much important work to raise awareness as well as running life-saving services and bringing people together so they reject living miserably, get help when they need it and don’t die by suicide. We are delighted to report that the quiz night raised a whopping £867 for CALM.

Whilst we were restricted for most of the year in terms of what in-person events we could run, David Williams didn’t disappoint and managed to put on a fantastic Golf Day, which we can’t mention without talking about the winner. Controversially (and we have been assured that it wasn’t a fix), our departing president, Andrew Dakin, took home the silverware which he now displays with pride at home on the mantlepiece, insisting on telling literally any passer-by about his winning performance.

So, despite the ongoing challenges we have all faced, we’re really pleased that we have still been able to get together with so many colleagues in the industry both remotely and in-person. Combining that with being able to raise so much money for some great causes really does demonstrate what we can achieve when we all come together. Thankfully, 2022 looks like it will (hopefully) be business as usual and Natasha Hall is already in the process of organising a brilliant event for the summer. There will be more detail on that soon and we hope to see you all there, in the Bolton sunshine, with a glass of something cold.

**Dinner Report**

Libby Vincent

The Annual Dinner 2022 was booked for Friday 4th February.  Preparations were well underway and we had:

* 177 tickets reserved (220 sold for the 2020 Dinner)
* Secured four sponsorship packages
* Invited the Top table guests
* Booked a Comedian, Master of Ceremonies and a photographer
* Chosen the menu
* Agreed the running order
* Drafted the Programme
* Tracked down the missing raffle drum and lectern (now in safekeeping with Shane Bennett)

However, due to concerns in respect of rising Covid infections, the decision as to whether we should proceed was tabled at the 9th December Council Meeting.  At the time, we had not signed a contract with Whites Hotel and were therefore not committed to any expense although they were pushing for payment.  Whites had advised that once we paid, they would not refund any monies if we were unable to go ahead and neither were they prepared to carry the booking forward to the 2023 Dinner.  We were also experiencing difficulty contacting them to discuss other options.  Council therefore made the decision to cancel the Dinner and we contacted Whites, our guests and all bookings to advise of the situation.  It was announced some days later that Whites had been taken over by the Radisson Hotel chain which we now think may have been the reason for their unresponsiveness.

**Learning & Development Report**

Paul Cooper

We have had just the three events this council year and we would have wished for more. We did intend on having an “in person” session but given the covid rates we were not sure this would have been well attended.

I am hopeful that the with the use of the technology, we have become so accustomed to over the past 2 years, that future events will be available both “In Person” and “virtually” which I would hope would boost the attendee numbers. In addition, I am hopeful that welcoming our colleagues from Blackburn and Burnley will provide a welcome fresh input to the L &D committee and certainly assist in keeping the topics wide raging and relevant.

The events hosted in the 2021/2022 year were as follows:

**12th November 2021 – GI Pricing Practices, Product Governance and Product Value**

Webinar provided by Branko Bjelobaba

Cost to CII - £540.00 (Inc VAT)

Attendance was not as expected but quite a niche subject. 20 people signed up but topped out at 12 on the teams call

1.5 Hours CPD

**2nd March 2022 – Cyber Threats and transforming risks for insurance**

Webinar provided by Will Gow

Cost to CII - Free

78 people signed up in total but on the day attendance topped out on Zoom at 40 people which is great

1.5 Hours CPD

**6th April - ESG and the impact on the Insurance sector**

Webinar provided by Shan Millie

Cost to CII - £250.00

1.5 Hours CPD