Chartered Insurance Institute

Standards. Professionalism. Trust.

December 2025

# Fellowship

## Regulations and guidelines

www.cii.co.uk

## About us

The Chartered Insurance Institute (CII), is a professional body dedicated to building public trust in the insurance and financial planning professions. Our 125,000 members commit to high professional standards and continuing professional development.

We work with businesses to develop bespoke, company-wide solutions that ensure competitive advantage by enhancing employees' technical and professional competence.

Success in CII qualifications is universally recognised as evidence of knowledge and technical expertise.

Our members are able to drive personal development and maintain their professional standing by adhering to our Code of Ethics and by accessing an unrivalled range of learning services.

Find out more at: cii.co.uk

## Our vision

Our vision is to build public trust across the insurance and financial planning professions by providing relevant learning, insightful leadership and an engaged membership. Driving professional standards is at the heart of everything we do. Ethical conduct and technical competence are supported by our Code of Ethics and qualifications, designed in conjunction with industry practitioners and registered with Ofqual in the Regulated Qualifications Framework.

# Welcome to the Fellowship programme

Fellowship of the Chartered Insurance Institute (CII) shows the world that you have attained and maintained the highest and most prestigious level of professional achievement. We are delighted that you are considering acquiring the FCII designation, which will further demonstrate your knowledge, experience and professionalism to the world.

The following pages set out the various routes that can be taken towards Fellowship.

In developing these access routes to the Fellowship, the aim has been to provide holders of our Advanced Diploma/ Associateship with every opportunity to advance to the highest level of recognition, regardless of how their career has developed in the interim.

This document enables each individual to outline their career record in the way that best demonstrates their fitness for Fellowship. In so doing, it presents a full picture of the candidate's technical knowledge before highlighting their business skills and achievements. It allows individuals to present their own case, taking into account their career choices and the subsequent requirements of their employment.

Achieving Fellowship gives insurance practitioners genuine differentiation. It confirms their commitment and ability and it adds real weight to their curriculum vitae. It is tangible, objective evidence of ambition and success.

We wish you every success with all your endeavours — and we look forward to welcoming you as a Fellow in the near future.

# Introduction to Fellowship

As an Associate member, you have already demonstrated considerable commitment to your own professional development, succeeding, as you have, in a wide range of subjects examined at the highest level. Fellowship shows that you have taken this commitment one stage further, demonstrating Continuing Professional Development (CPD) through a major achievement and planned acquisition of skills and knowledge. The Fellowship programme has been designed on the basis that each individual is in the best position to evaluate what development needs they have and how best to address these needs.

The programme is designed to give you control of the way you progress your own career while also working towards Fellowship. It gives you the ability to select a path to Fellowship which fits your own skills, interests and development needs.

## Eligibility to become a Fellow

To become a Fellow you must meet all of the following requirements:

- have completed your Advanced Diploma/Associateship before enrolling on the Fellowship programme*;
- be a current Associate member of the CII (and remain a member throughout your progression to Fellowship);
- have been employed (or self-employed) in insurance for at least four years overall;
- be wholly or mainly engaged or employed in work connected with insurance;
- fulfil the requirements of the Fellowship programme set out in these guidelines;
- be able to supply records of your last three years of Continuing Professional Development (CPD) which adhere to the minimum of 35 hours' compulsory CPD for each year (of which at least 21 hours must be structured CPD);
- meet the requirements of the Fellowship Assessment Board.

## Fellowship Advisory Service

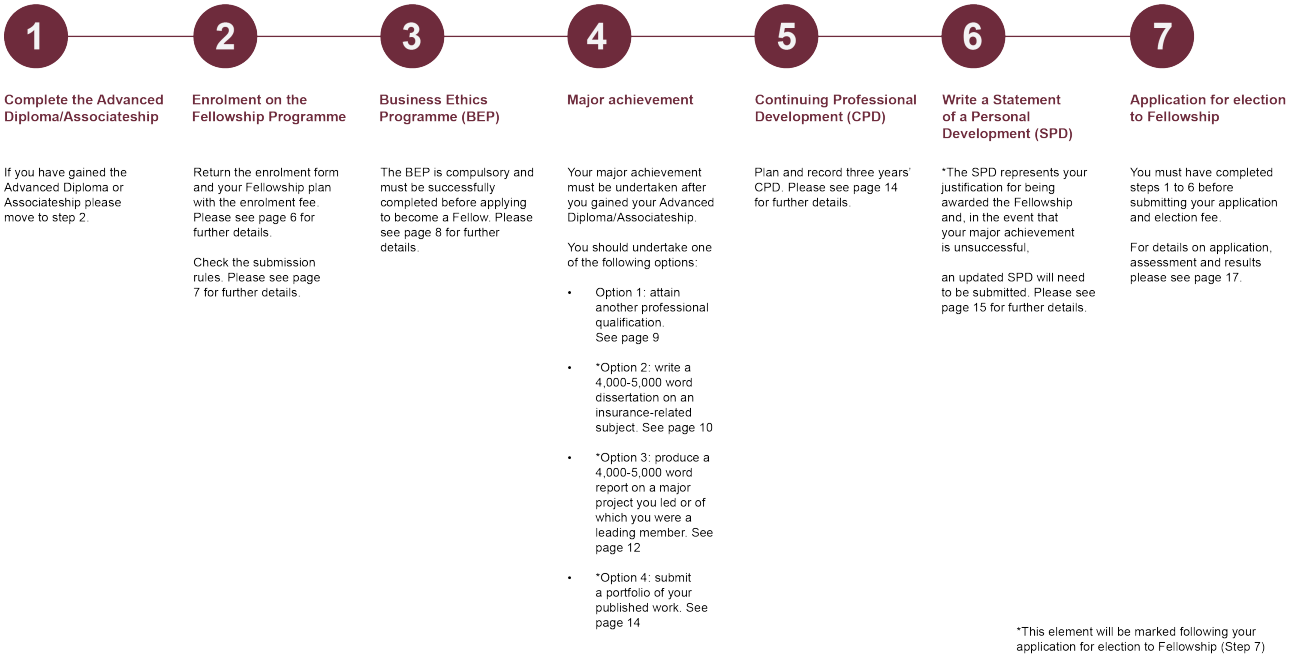
For further guidance and support prior to or during your Fellowship application, the Fellowship Advisory Service (FAS) is on-hand. The service provides help and advice, however cannot provide technical information about a subject you may be studying. In these circumstances, we would advise seeking assistance from a mentor from your workplace or approaching your Local Institute.

email: societies.fas@cii.co.uk

*If you are a pre-1992 ACII you will need to submit a summary of ten years' relevant work experience.

# Steps to Fellowship

www.cii.co.uk/membership/fellowship-programme-overview/




## Step 1 – Complete the Advanced Diploma/ Associateship

If you have gained the Advanced Diploma or Associateship please move to step 2.

## Step 2 – Enrolment and Fellowship plan

If you are intending to apply for Fellowship you must complete the Fellowship enrolment form (www.cii.co.uk/membership/fellowship-programme-overview/fellowship-programme-requirements/) and send it to us, with the appropriate fee. You must also complete the major achievement application form if you are putting forward a professional or managerial qualification as part of your Fellowship plan.

If you hold the pre-1992 Associateship it will be necessary for you to submit a summary of ten years relevant work experience since qualifying as an Associate (a Curriculum Vitae will suffice), along with your enrolment application form and Fellowship plan.

### ☆ Important:

Please note that enrolment is valid for five years from the date of its acceptance by the CII. You must remain a member of the CII while on the Fellowship programme. If you do not successfully complete the Fellowship programme within five years, you will have to re-enrol and pay a further enrolment fee unless the FAS grants an extension due to special circumstances.

# Fellowship plan

The Fellowship plan should be completed in full and can be found on the back of the enrolment form.

The plan should cover the period up to application for election to Fellowship and it enables you to set an agenda for how you plan to become a Fellow. To obtain the maximum benefit from planning the next stage of your professional development, it is important to identify your major overall objectives and to combine these with practical, tangible and achievable interim goals.

## Current position

To be most effective, the plan should be based on an analysis of your current position. Familiarise yourself with the following sections and decide on your major achievement.

## Objectives set to reach Fellowship

This section prompts you to set a realistic timetable for the completion of each step of the Fellowship programme.

You are also asked to state how you have tried to ensure that the personal objectives you have set to reach Fellowship meet with those of your employer. The Fellowship is about your personal and professional development. If your plan fits corporate objectives, you are more likely to receive support from your employer and so obtain the greatest career benefit from your chosen route.

## Major achievement chosen to support election to Fellowship

The plan must include details of your proposals by way of a major achievement.

If you are intending to undertake another professional or managerial qualification as your major achievement you should read the guidelines on page 8 and then complete the application form and **send it in with your Fellowship plan**. If you have already completed a professional or managerial qualification which you would like to use as your major achievement, please also enclose a copy of your certificate and results notification **(these must be attested to be a true copy of the original by a person other than yourself who is a current member of the CII or PFS. The member must include their PIN for verification by the CII/PFS)** with the application form and documentary evidence.

If you propose to submit a dissertation, project report or portfolio of published work as your major achievement you should read the relevant guidelines on page 10.

Once you are confident that your major achievement will meet the guidelines, complete the relevant section on your plan with details of your chosen major achievement.

**Employer agreement is essential if you are intending to use a work-based dissertation or project report as your major achievement. If this is the case please ensure that you obtain your employer's endorsement of your intended major achievement.**

## Other considerations

When completing your plan you should also consider the requirements of our CPD scheme (see page 21).

You need to maintain your CPD records, which must adhere to the CII Membership CPD rules, as these will need to be submitted when you submit your final application for election to Fellowship.

The plan can be used as a basis for further analysis of your current position and identification of areas where you can see opportunities for acquiring or improving skills or knowledge, which will be important for your future.

When completing your plan you are also encouraged to consider:

- what current skills/technical knowledge you need to maintain;
- what new skills/technical knowledge you need to learn;
- what constraints there are on your learning (eg, time, geographic or physical constraints);
- what resources are available to you.

We recommend that you identify those areas you feel would enhance your personal development and career. The emphasis should be on acquisition of experience, skills and knowledge which will extend your interests and will help you realise your career aspirations and potential.

### What if my circumstances change?

During your progression to Fellowship your professional or career situation may change. If so, you may need to review your plan to reflect your new circumstances and goals. If you decide to change your choice of major achievement we recommend that you notify the FAS so that we can advise you, and update your Fellowship records.

## Fellowship submissions

### Rules for ensuring the originality of submitted work.

In submitting work under the Fellowship programme you are declaring that it is your own work.

Plagiarism is taking somebody else's work (human or AI) and passing it off as your own – this would constitute a breach of the CII's code of ethics and could result in disciplinary action. To avoid plagiarism, simply put any content you have sourced from elsewhere in italics to denote you are not trying to pass it off as your own – and put a short citation in brackets to say where the content was sourced from. You can include a full reference list at the end of your major achievement.

If you feel any of the AI tools available would benefit you and you do decide to use them, we would always recommend you do so with caution, ensure you stay within the regulations outlined in this document and make full use of the Fellowship guidance. You must follow the rules relating to the use of AI detailed in the coursework and dissertation section of the assessment rules in the assessment rules and policies page.

You must keep copies of drafts of your work that you will submit under the Fellowship programme which show the progression of your submission from initial draft to final submitted version.

In the event of an allegation that may challenge the authenticity of submission the more evidence you can provide to show you composed the content of your submission yourself, the better. Therefore you should retain your drafts as you construct your submission. As well as keeping these drafts, if you are using any kind of AI writing tool such as Grammarly, you should keep a full "clean" draft of your submission prior to using the AI writing tool.

In the event of an allegation or evidence that may challenge the authenticity of your submitted submission, you will be asked for and must provide copies of your drafts.

### All work submitted for assessment will be subject to plagiarism software checks.

If a match is found to another student's work or other published sources then this will be fully investigated.

It is a disciplinary offence to submit someone else's work as your own. Completing, copying from and/or amending your work with the help of another person is not permitted. Neither is it permissible to allow your work to be used by and/or amended by anyone else in order to complete their own application.

Failure to comply with these rules may result in disciplinary action and your name being published in our Journal and Financial Solutions magazines and the website. Details of the CII's disciplinary procedures and rules can be found at www.cii.co.uk/about-us/professional-standards/disciplinary-and-appeals/

## Fellowship submission checklist

It is your responsibility to ensure that all work submitted for assessment under the Fellowship programme meets the specified criteria. Failure to follow the rules may lead to your submission being returned and delay your Fellowship application.

### Check your submission

☑ Includes a word count on the front page

☑ Does not exceed the specified word limit

☑ Has been checked for spelling, grammatical and technical errors

☑ Properly references the work of other authors

# Step 3 – Business Ethics Programme (BEP)

Making good choices is something that we learn to do as children, and continue to do throughout our lives. We make ethical decisions all the time – sometimes without even realising it. However, in a business environment, 'the right thing to do' can sometimes be unclear. We are faced with many, often conflicting, pressures – pressures on time, pressure from customers and managers, lack of resources (to name a few), which all impact our ability to make ethical decisions with courage, conviction and certainty.

This course is designed to give you the knowledge and skills to organise your approach to ethics at work, and then apply them in daily life. It is structured around five components:

1. Ethics: what does it mean for me?;

2. Ethical decision making;
3. Ethical dilemmas – tackling them with confidence;
4. Recognising and responding to the challenges that can arise;
5. Ethical leadership and influencing others.

By the end of the course, you will be able to:

- Understand what ethics is and why it matters
- Understand the various factors involved in ethical decision making
- Feel confident being able to tackle various ethical dilemmas
- Be prepared for ethical challenges that may arise, and know how to respond to them
- Understand the nature and importance of ethical leadership

This programme has been built around practising ethics in a modern insurance context, and focuses closely on the importance of building and maintaining trust, which is necessary for the insurance market to be able to operate successfully. It's a practical – not philosophical – introduction to key business ethics concepts, which you will learn how to apply in real-life situations. As a result of engaging with the material, you will gain greater clarity and certainty to be able to successfully resolve difficult situations in your current role, and as your career continues to progress.

As the BEP is based on distance learning, you can undertake this at any time after enrolment. We recommend that you undertake the BEP in either the first or second year of your Fellowship programme. This will help you to avoid any last minute rush and also, because the BEP is designed to have a practical value to you throughout your professional life. The earlier you complete the BEP, the more value you are likely to gain from it.

Before embarking on the BEP, you should refer to the CII Code of Ethics and related materials on ethical conduct; these can be located on our website: www.cii.co.uk/about-us/professional-standards/code-of-ethics/

Your Business Ethics Programme (BEP) study text and assessment materials can be found in RevisionMate. You will also be able to upload and submit your completed assignments via RevisionMate (www.cii.co.uk/learning/support/revisionmate).

The BEP comprises of:

- The CII study text on business ethics, in a downloadable and printable format.
- An online assessment consisting of:
- 44 multiple choice questions;
- 5 written answer assignment questions.

Your assessments must be entirely your own work and need not be completed in a single sitting or under exam conditions. You are free to repeat each multiple-choice test of the assessment five times, and your highest mark will be recorded. **After five attempts the test will be locked for one month, please contact societies.fas@cii.co.uk to unlock a test.** The multiple choice questions will be marked automatically, but the written assignment questions will be reviewed by an assessor within 40 days of submission.

Please follow the instructions on RevisionMate to upload and submit your completed assignments. We will not return your assignments to you after marking so we recommend you retain a copy, which you should keep securely and confidentially; you should not share your material with anyone else in any circumstances.

Your completed assignments will be evaluated by a CII appointed expert. You will be advised, in writing, if you have satisfactorily completed the BEP; or you will be provided with feedback outlining the areas requiring additional consideration pending resubmission. There is no specific deadline for submission of your BEP, although this must be successfully completed before you can apply for election to Fellowship.

# Step 4 – Major achievement options

There are four types of major achievement:

Option 1 – Additional professional qualification

Option 2 – Research-based discussion paper

Option 3 – Report on a major project that brings about change in a commercial capacity

Option 4 – Portfolio of published works.

You need only choose one option which must be attained after you have passed the Advanced Diploma/Associateship. If you change your mind about the major achievement that you wish to submit for Fellowship, please advise the FAS. This is particularly important if you want to study for another professional qualification: you must check that it is appropriate.

## Confidentiality

Many work-related projects and dissertations include information of a sensitive commercial nature. Where this is the case, you may change names and references (eg, to ‘company x’ or ‘product y’) provided that the actual names and references are disclosed on a separate sheet of paper which will be made available to the FAS only, not to assessors. We may undertake investigations, as considered appropriate, to ensure the validity of the information.

## Publication

If your major achievement is chosen for publication on the CII website, you will be contacted for permission.

## The categories for assessment

The categories for assessment used by the Fellowship Assessment Board to judge each major achievement are set out below. Please read these very carefully – many people fail to be elected to Fellowship because they do not observe the rules. Remember, you only need one from the four major achievement options listed below.

# Option 1 – Additional professional qualification

The Fellowship programme recognises that, for many people, an additional professional qualification may be the most valuable form of personal development. As long as these qualifications are relevant to the work done in the context of insurance operations, credit can be given.

## All professional qualifications will be judged against the following criteria:

- it must be gained after the Advanced Diploma/Associateship has already been achieved;
- it must be obtained by independent/external assessment by the awarding body with a minimum of four assessments or their equivalent at Advanced Diploma subject level or above (e.g. Level 6 in England and Wales);
- it must usually have been awarded after
  i. a minimum of two year's part-time study or
  ii. one year's full-time study;
- where achievement of the additional qualification is partially dependent on credits awarded for prior learning, additional assessments equivalent to at least 120 Advanced Diploma credits must be undertaken;
- the subject matter of the qualification must be relevant to your occupation in the insurance sector;
- it must be a complete qualification, which meets the criteria in its own right.

A qualification which has been used to gain credits for the Advanced Diploma/ACII/APFS cannot be used as a major achievement. **It is advisable to have a qualification assessed by the FAS before you start studying towards it.**

## Examples of qualifications used as major achievements

The following qualifications* are just a few which have been used as major achievements:

- APMI – Associate of the Pensions Management Institute
- FPFS – Fellow of the Personal Finance Society
- BA(Hons) Financial Services, Insurance Management or Insurance Studies
- ACCA/CIMA qualification for Chartered Accountant or other equivalent accounting qualifications
- GradICSA – Institute of Chartered Secretaries and Administrators
- Graduate Diploma in Law
- LLB (Hons)
- MBA – Master of Business Administration
- MSc in Insurance and Risk Management – CII/Cass Business School
- Post-graduate Certificate in Law
- Post-graduate Diploma in Marketing, Chartered Institute of Marketing

*These qualifications are correct at the date of publication. Please note that each submission is subject to a full review.

The application form for a major achievement is on the CII website www.cii.co.uk/membership/fellowship-programme-overview/fellowship-programme-requirements/. When making your application, you must enclose documentary evidence of non-CII qualifications demonstrating that the qualification meets the relevant criteria. Such evidence can be:

- details of the method of assessment;
- course outline;
- syllabus summary of the topics covered;
- examination papers undertaken as part of the qualification.

Please note that the CII is not able to obtain this information on your behalf and failing to supply all the relevant information may delay your application. All information submitted must be in English.

If at the date of application you have already completed the qualification, you should additionally submit either the original results notification and certificate or a photocopy (a person other than yourself who is a current member of the CII or PFS must attest the copy to confirm that it is a true copy of the original and sign it to that effect. The member must include their PIN for verification by the CII/PFS).

If your qualification is unacceptable for the CII Fellowship scheme, you will need to choose a different major achievement.

## Option 2 – Dissertation

A dissertation, for CII purposes, is a discussion paper covering an insurance-related subject. If your dissertation is employer based, you must seek their written approval before submitting it. If you choose this route, your dissertation must:

- be typewritten in grammatically correct English;
- be 4,000–5,000 words long (a 10% increase is acceptable as an absolute maximum) and include a word count (dissertations outside of the word count and/or without a word count will NOT be accepted);
- be on an insurance-related subject;
- have been researched and written by you. You may get someone to type it from your own instructions but it is a disciplinary offence to submit someone else's work as your own.

### Examples of acceptable practices

- Quoting small sections from the works of others, typically a sentence or paragraph, provided that the author's work is fully acknowledged.
- Writing a dissertation based on previous work which you have written. The dissertation must not be identical to the previous work and must be updated where appropriate. The nature and existence of the previous work must be acknowledged, eg, 'based on my MBA dissertation completed in May 2011'.
- Information quoted should be the most up-to-date available.

- Your work may be typed, proof-read and critiqued by another. There are some restrictions on who can be used as a proof-reader. The proof-reader should NOT be anyone who is working in the sector or may seek to work in the sector in future. The proof-reader should NOT hold a qualification in insurance or financial services or intend to do so, they should not have taken or intend to take, any insurance of financial services related courses. Please be aware, if this guidance is not followed and your proof-reader submits parts of your work as their own, you will still be part of an investigation.
- When using a proof-reader please keep a record and evidence of the proof-reader (keep any email correspondence, name and contact details). Please record when the assignment's content was provided to them and evidence that you instructed them not to use or share your work and only to provide guidance as detailed below. Their input and the extent of it must be acknowledged in the dissertation, eg, 'typewritten by my secretary James Jones and proof-read by Felicity Brown'. You may ask someone else to comment on any shortcomings in your draft dissertation but any changes must be your own work. You must follow the rules relating to the use of a proof-reader detailed in the coursework and dissertation section of the assessment rules in the assessment rules and policies page.

## Examples of unacceptable practices

- Plagiarism – that is, using the words of another author as your own.
- Submitting a previous work without authorisation or acknowledgement. For example, a dissertation you used as part of another qualification.
- Using out of date information and data.
- Getting a researcher to write any part of your dissertation.
- Getting a secretary, adviser, consultant, lecturer, writer or any other person to write or amend any part of your dissertation.

## Choosing the right subject

Put a question in the title. This strategy can help to keep both author and reader focused. If you are considering a number of alternative subjects, discuss your ideas with colleagues. Bear in mind that it can be difficult to write something new and interesting on some of the most popular topics.

Keep to subjects you know well and are confident about. The Fellowship assessors look for an in-depth understanding and developed argument. This is more difficult to do if you decide to investigate a completely new field. If you decide to write a dissertation on an area new to you, please ensure you explain in the introduction your reason for the choice of subject. As you would be learning about the subject during the time you are writing, the requirements to review the whole dissertation once completed is even more important to ensure consistency.

Keep the subject focused. The assessors like to see a detailed discussion on a specific topic, rather than a shallow treatment of a broad subject.

You must state in the introduction to your dissertation why you have chosen this particular subject to research. The subject should generally be linked either to your current or future work, or to an area of special interest to you or to your employer, or to a subject of significance to the insurance profession as a whole.

## Unsuitable topics

- Purely historical, non-analytical narratives, eg, ‘The history of motor insurance’.
- ‘How to...’ or textbook guides, eg, ‘How to obtain new business’.
- Lecture notes.
- Extended job descriptions.

## Getting the structure right

### Compile a contents page

This will help you to see at a glance how your paper will develop. If you struggle to identify the main themes at this stage, now is the time to choose a different subject.

### Get the balance right

Remember that the assessors will want to see a balanced consideration of the topic with a strong element of debate. Be clear on not only how you will incorporate supporting material, but also how you will explain any contradictory evidence.

### Keep to the word limit

4,000–5,000 words may sound like a lot but it is all too easy to overrun. Check your paper for ‘padding’. Make every word count. Your dissertation must include all of the following:

- a title;
- a contents list;
- an introduction of no less than 200 words;
- a conclusion of no less than 300 words;
- a cross-referenced bibliography. This must set out the publications, including websites, you have used for authoritative input to your work. Using text verbatim from other sources (except where clearly shown as such) is not acceptable – the dissertation must be your original work only;
- appendices where these add to the text – these should only be included where you feel it will be helpful to the reader. They are not counted in the word count;
- a word count.

Your dissertation must set out what the subject matter is or what the key findings are. It should then develop this theme, taking account of others’ views on the subject as well as your own, supported by the evidence given in the paper.

Your dissertation must not exceed the word limit of 5,000 words long (a 10% increase is acceptable as an absolute maximum). Dissertations outside of the word count and/or without a word count will NOT be accepted or it will be returned for editing and potentially delay your Fellowship application.

## Submission

Your dissertation must be submitted via the RevisionMate portal as part of your election application. You will receive further information on how to submit your dissertation on RevisionMate by email once we have received your election application. Your dissertation will not be reviewed separately if submitted before you are in a position to apply for election.

## Presentation

Subdivide the text. It is far easier to read text when it is labelled with sub-headings.

Use 1.5 line spacing and Arial size 11 font.

Make sure that there are no mistakes in the text or in any figures. Spend time proof reading, including spelling, grammatical errors and use of language.

Use a contents page and use page numbers – this is mandatory and will help the reader navigate the paper.

## Research

Read widely on the subject, using offline and online references, before starting. Use the most up-to-date information available, but an allowance will be made if your location makes that difficult. Consider how much research material is available.

If there isn't much material for you to base your paper on, you will need to be prepared to carry out the initial research yourself.

Keep good records on the information you may use later; this will help you with your cross-referenced bibliography. You must include citations.

Do not plagiarise. Fellowship assessors are widely read and have access to subject experts if they suspect plagiarism. Someone else can type the paper for you so long as they do not otherwise contribute and their role is acknowledged.

On the other hand, you can include short sections of others' work provided that the author is fully identified.

We strongly recommend that you read other successful dissertations, which are available online at cii.co.uk/learning/support/fellowship-dissertations.

You should also ask a colleague or academic contact to give you an unbiased critique of your paper before submitting it. Suggestions for reading material which may help with the preparation of your dissertation are given on page 12.

Appendices should only be included where they are relevant to your dissertation and would be helpful to the reader.

Those who assess your dissertation wish to see evidence of your own views being expressed, it is not sufficient just to repeat what others may have already said, or written.

## The categories for assessment

### Introduction and rationale for choice of subject

This section should be at least 200 words long; it should introduce the subject and set out how the paper will develop its theme. It should also explain why you have chosen that subject – it may be a major issue within the profession on which you hold strong views, a subject about which you or your employer want to know more or a subject that will benefit your career development.

### Main text

Over a third of the marks go to this section. Consideration is given as to how you have developed the theme: how you have introduced, analysed and incorporated contradictory and supporting evidence into your case and how the paper has been broken up into clearly developed sections. You should include your interpretation and explained argument prior to reaching a conclusion or making recommendations. Information in the dissertation should be up-to-date and relevant.

### Quality of research

The assessors look to see that you have taken appropriate steps to ascertain what information is available on the subject and its relevance. You should make clear within the text the relevance of research included and use such research to demonstrate specific points. Quality of research is more important than the length of the bibliography and allowance is made if you have only very limited access to research material. You should mention in the introduction to your major achievement if there have been any difficulties or restrictions on your research. The CII, however, expects you to make every effort to research your subject adequately. The bibliography must be fully cross referenced to the text.

### Clarity of argument

The basic premise of your dissertation and your overall objective must be clear and well developed throughout the paper. Keep your argument focused. Arguments should be logical and based on hard evidence where this is available. The arguments contained within the dissertation should be fully developed and then further strengthened by your personal interpretation.

### Personal position in the debate

Your dissertation must clearly evidence your own position in the debate.

### Presentation

Remember the importance of accurate spelling and grammar. You should take care to ensure that your paper is well presented, and free of spelling mistakes, poor grammatical construction and poor syntax. Your paper should be typed using 1.5 line spacing and Arial size 11 font. You must submit one copy by e-mail to societies.fas@cii.co.uk. A contents page and clearly defined sections within the dissertation must be included.

### Conclusion

Approximately a fifth of the marks go to this section. The conclusion should be no less than 300 words and must draw together the main themes of the paper and put forward firm recommendations or solutions. However, it should not include fresh research or views which have not been included and discussed within the text. The paper must relate back to its title and resolve any issues identified in its introduction. If it is not possible to resolve an issue, then a possible solution or route around an issue should be proposed. Your paper must contain your own thoughts and show where you stand in the debate. Your recommendations need not necessarily be ones that your employer would suggest. You can hold whatever views you like as long as they are backed up with evidence. A good conclusion should be balanced and logical and almost stand alone as a summary of the paper.

Each section of your dissertation will be assessed separately.

### Further reading

Below is a list of some books that provide advice to dissertation and project writers. These books are for information only and **all submissions must follow the guidance given in this booklet.**

Succeeding with your Masters dissertation: a step-by-step handbook. 2nd edition. John Biggam (Oxford University Press, 2011).

Doing a successful research project: using qualitative or quantitative methods. Martin Davies & Nathan Hughes (Palgrave Macmillian, 2014).

Researching and writing a dissertation: a guidebook for business students. 3rd edition. Colin Fisher (FT/Prentice Hall, 2010).

Mastering your business dissertation: how to conceive, research and write a good business dissertation. Robert Lomas (Routledge, 2011).

Dissertations and project reports: a step by step guide. Stella Cottrell (Palgrave McMillan, 2014). Critical reading and writing for postgraduates. 2nd edition. Mike Wallace, Alison Wray. (Sage Publishing, 2011).

Members can borrow these materials from Knowledge Services. For information about lending services please go to cii.co.uk/learning/knowledge-services/

## Option 3 – Projects

These entail a report in English on a major insurance related project which you have either led or in which you have been a key member of the project team. If your project is employer-based, you must seek their written approval before submitting your project report.

A project report is not the same as a dissertation and you should carefully scrutinise the differences in requirements. A project is likely to be commercial in nature with clear aims and is designed to be completed over a defined period of time in accordance with an agreed business case, whereas a dissertation is, by comparison, a research-based discussion paper.

### Choice of project

Make sure that you choose a project which will enable you to write a report that satisfies all the categories for assessment. However important a project may have been to you or your employer, you are being assessed on your evaluation of the project, rather than the success of the project itself. Ideally, pick a project from which you learnt a lot and from which your skills have developed. These are important issues in the marking scheme.

The project must be led by you or you must play a significant role in it. Significant means that you must represent your company, or a large group on the project team. You must contribute or be responsible for a significant proportion (generally at least 20% of the key inputs to or outcomes from the project group) and be seen by others on the project team as being a significant player in the project. As a guide, it is likely to involve at least 60 working days' input from you.

A project may be your own idea, or an existing one. Although projects must be insurance related, they need not necessarily involve a work-related project for your employer. In keeping with the status of being a major achievement, projects should be significant in the context of your own professional development.

## Examples of acceptable projects

- Development of a new product or service.
- Acquisition of, or merger with, another insurance-related organisation.
- Business development idea with a core insurance-related organisation.

## Examples of unacceptable projects

- Non-strategic, routine issues.
- Acquisition of, or merger with, a non-insurance related business.
- Development of a non-related product, service or business.

## If you choose this route, your project report must:

- be typewritten in English;
- be 4,000–5,000 words long (a 10% increase is acceptable as an absolute maximum), regardless of how many projects are covered, and include a word count (projects without a word count and/or outside of the word count will NOT be accepted);
- take the form of a written report;
- be clearly set out—using the elements and ‘categories for assessment’ headings opposite.

## The project report should include the following elements:

- the business case, rationale and background to the project;
- definition of the project: what the project was, its objectives and planned time scales and outcomes;
- project methodology: how the project was run, including budgets, milestones, deliverables, issues and risks;
- project team members and/or stakeholders: names and/or responsibilities, impact on workload, support and decision making processes;
- application of initiative and research conducted;
- measured outcomes and an overview of the project’s successes and failures;
- your personal inputs and outputs and your project responsibilities;
- key learning points from the project for you personally;
- any skills and knowledge gained or enhanced as a result of the project.

Please include a statement of how much time you spent on the project, counter-signed by the project manager or, if you are the project manager, by an authorised signatory of your employer.

## Structure

Make sure that the categories for assessment are clearly covered in your submission. To gain maximum points establish a structure, using a contents page and suitable headings and sections (such as those mentioned above), which make it clear where points are being addressed. It is easy to become so close to your project report that an assessor may not identify what you perceive to be obvious.

## Submission

Your project report must be submitted via the RevisionMate portal. You will receive further information on how to submit your project report on RevisionMate by email once we have received your election application. Your project report will not be reviewed separately if submitted before you are in a position to apply for election.

## The categories for assessment

### Introduction and rationale of the project

This includes assessment of the clarity of the business case and objectives, the parameters set by, or for, the project group and the methodology used to achieve the desired outcomes.

### Your input to the project

Over a third of the marks go to this section. It includes how decisions are arrived at by the project team, how stakeholders were involved and evidence of the use of initiative to achieve desired outcomes. There should be evidence to demonstrate the quality of your input to the project, a detailed post-project analysis of your input to the project, and your own key learning and skills gained from the project.

### Methodology

The assessors look to see how you have gone about your tasks, how you have conducted or commissioned research, how you have used available resources (within your organisation and outside) and how you have organised your workload, making allowance for any other responsibilities you and the rest of the project team had outside the project group. An explanation of how the project has affected your other work areas should be included.

### Your input into team objectives

This rewards candidates who think and contribute outside of their own areas of responsibility. Effective teamwork is a prerequisite of a good project and these factors are evidence that you played your part in developing the team ethos of the project group and explain how decisions were reached.

### Presentation

Remember the importance of accurate spelling and grammar. You should proof read your report to ensure it is well presented and free of spelling mistakes, poor grammatical construction and poor syntax. Your paper should be typed using 1.5 line spacing and Arial size 11 font. **You must submit one copy by e-mail to societies.fas@cii.co.uk.**

A contents page and clearly defined sections within the report must be included.

### Outcomes of the project

About a fifth of the marks go to this section. You should draw together the measured outcomes, budgetary and time compliance of the project. The information should be presented in a balanced and logical order. The solutions should be appropriate to the needs and requirements of the project sponsor. The project outcome should be related back to the original objective and business case, and you should demonstrate that efforts have been made to resolve all issues.

Each section of the project will be assessed separately.

Assessors look at your input rather than that of any others involved in the project. You are not marked down if other members of the project group performed poorly unless you were responsible for their input. Assessors do not expect every project to be exceptionally successful – not every project can succeed in meeting its objectives – but they do look to see that the project's outcomes were in line with what could reasonably have been expected and that lessons have been learnt.

### Evidence

Although the project analysis is restricted to a maximum of 5,000 words, you can include documents in an appendix which clarify or prove points that you make in the main text. Appendices are not included in the word count. However, you should not include excessive information within an appendix unless it is directly relevant to the project report.

**☆ Important:**
Your project must not exceed the word limit of 5,000 or it will be returned for editing and potentially delay your Fellowship application.

### Revise, revisit, refer

Compiling your project report will take some time. It is important that you keep referring back to these guidelines and checking that you are still making the points you initially intended to. Some applications include references to sections which have been deleted, or the introduction identifies different points to those which are eventually found in the conclusion. This happens because a candidate has become so immersed in their paper that their view of the issues changes over time. Try to pass a final draft to someone who has the time to read it carefully. Ask them to consider it against these guidelines and listen to their feedback carefully, the assessors will not have the luxury of asking you what you meant to say. But remember, this is your application, so if a colleague asks you to make changes, you must be happy with them. More than one candidate has failed because they were advised by a friend to remove significant detail which the assessors felt should have been included.

## Option 4 – Portfolio of published works

This option is likely to be of interest only if you have already made your mark on the industry or profession through your published works. Normally these works will take the form of books, although in certain cases an article or series of articles in an approved journal will be accepted as long as the criteria set out below are observed:

Examples would include approved textbooks and articles in publications such as Post Magazine, CII Journal, Insurance Professional, subject to the minimum word count.

If you choose this route, your published work(s) should:

- be printed in English (or with an English translation provided by you at your expense);
- have direct relevance to insurance or to an aspect of insurance or a related market;
- take the form of a critical analysis or be used for reference;
- be put in circulation to experts in that field;
- be regarded as of value to specialists in the field covered.

Copies of each published work (including where appropriate English translation copies) must be submitted electronically.

Each published work must be accompanied by a written summary of around 100 words setting out:

- the purpose of publication;
- where and when the work was published, including ISBN number and name of publisher;
- the intended audience with an indication of the number of copies sold or the estimated readership;
- any follow-up that resulted from publishing the work.

Your portfolio of published work must include at least one, but no more than three (exceptions may be made if the portfolio takes the form of a series of articles) separate works, usually a minimum of 10,000 words in total. Books will certainly not be disqualified if they are substantially in excess of 10,000 words but there is no advantage to greater length – the assessors look to quality not quantity.

You must confirm how much of each published work submitted is entirely your own and what external help and advice you had (if any) in producing it. A degree of editing, external research and guidance is acceptable. We reserve the right to make enquiries as to the accuracy of all statements.

## Submission

Your portfolio of published works, including your written summary, must be submitted as part of your election application. This will not be reviewed separately if submitted before you are in a position to apply for election.

## The categories for assessment

### Adequate research

Clear evidence of research must be available, either from the text or supplementary information provided by you.

Where information is derived from other sources, these must be clearly identified and acknowledged. Plagiarism – that is using the words of another author as your own – is an unacceptable practice.

### Clarity of thought and expression

The works must show evidence of logical thought processes and be well structured. Views should be clearly expressed and consistent with the needs of the audience.

### Value to the industry and profession

It should be clear how the works add value to some aspect of the industry and/or your employer or sponsor of the work.

### Overall quality of the work

Assessors look for evidence that you have taken an effective approach and that the end results come up to a standard to be expected for the work and identifies, addresses and satisfies the needs of its audience.

It is permissible to provide supplementary evidence to demonstrate how your work meets with these categories for assessment.

Each category will be assessed separately and marks available will be divided equally between the four categories.

## Step 5 – Continuing Professional Development (CPD)

One of the requirements for election to Fellowship is the completion of three years' Continuing Professional Development (CPD). For each year submitted you will need to:

- Complete minimum of 35 hours' compulsory CPD each year of which at least 21 hours must be structured CPD.
- 35 hours is the minimum required. In practice the figure may exceed this as the actual requirement will be determined by an individual's development needs in any 12-month period.
- For an activity to be eligible it must be a minimum of 30 minutes in duration (a batch of different activities of less than 30 minutes each undertaken to meet a specific learning outcome can be combined and recorded together).

You will be sent CPD guidance notes which contain further information on CPD and details of the CPD online recording tool www.cii.co.uk/learning/cpd/. Regardless of the date you enrol onto the Fellowship programme, you will be able to backdate your CPD records.

If you are recording CPD under the CII CPD scheme, this will be accepted towards your Fellowship commitment.

If you have recorded CPD activities under another CPD scheme, it is possible that you may be able to use these records towards your Fellowship commitment. For further advice please contact the Fellowship Advisory Service on societies.fas@cii.co.uk.

Your CPD records should be submitted to the Fellowship Advisory Service one month before you are ready to submit your application for election to Fellowship, or alternatively you can submit them for assessment with your election application.

The CII will confirm in writing if your CPD record meets the requirements of the CII scheme.

Further information on the CPD scheme and the on-line CPD tool can be found at www.cii.co.uk/learning/cpd/.

# Step 6 – Statement of Personal Development (SPD)

Fellowship is the ultimate achievement and you must demonstrate how, through your learning process, it has helped you develop as a person and as a skilled practitioner. The SPD is a critical part of your programme and will clearly show what you have learned through the Fellowship programme. You should refer back to steps 2–5 when completing your SPD.

## Drafting your Statement of Personal Development (SPD)

The Fellowship assessors will consider your SPD in detail and you should not underestimate the time that it will take to complete.

Your Statement of Personal Development must:

- be typewritten in English;
- be clearly set out using the 'categories for assessment' headings below;
- not contain any spelling mistakes or grammatical errors. It may help to have someone else proof read your SPD (please see page 11 for rules around proof-reading);
- be 1,000 words long (a 10% increase is acceptable as an absolute maximum) and include a word count (SPDs without a word count and/or outside of the word count will NOT be accepted);
- represent you in a professional, formal manner;
- review what you have achieved by effectively providing an executive summary of your achievements;
- be submitted via the RevisionMate portal. You will receive further information on how to submit your SPD on RevisionMate by email once we have received your election application. Your SPD will not be reviewed separately if submitted before you are in a position to apply for election.

Listed below are six categories the assessors will be looking at when they consider your SPD. Please use these headings in your SPD to ensure that you demonstrate coverage of all six areas. Under each heading ensure you give enough detail to demonstrate your personal achievements.

### The categories for assessment

Candidates can be, and are, rejected on their SPD. Usually the Assessors feel that unsuccessful candidates do not address adequately each of the sections below – especially the last three. By using the headings and following the guidance carefully you will greatly enhance your chances of success.

#### Overview

This sets out, in two or three paragraphs or approximately 250 words, how you have set about your Fellowship programme and any key changes during it.

#### Plan

You should restate the key points of the plan you drafted on enrolment onto the Fellowship programme and also show how you achieved the objectives set. This should emphasise new knowledge gained and the skills you used to achieve this. You should be able to see some of the effects of this process on your career.

### Changes to plan

If your Fellowship plan changed, you should set out what you changed and why you changed it. It may have been for external reasons (eg, a change of job or other circumstance) or for internal reasons (eg, you were unhappy with your progress on your major achievement or identified a new opportunity which you wanted to exploit). The effect of circumstances beyond your control should not be ignored and events, which have caused delay, should be identified. If there are no changes to your plan you must make this explicit. You should also highlight how you were affected by, or made use of, unplanned opportunities that arose. It would be particularly helpful to indicate whether these opportunities were based on situations which you initiated, or unexpected ones which you were able to exploit. How were you affected? How did you make use of these opportunities? If the change of plan was unexpected, were you able to use the pressure to your advantage and provide an innovative solution?

If you have been involved in any activity which did not feature in your plan but from which you have learned something, describe how it arose, what it involved, how it contributed to achievement of the objectives you originally identified and how it might have contributed to a new aspect of your development.

When reflecting on your activities you should consider to what extent you have experienced personal or business benefits through the practical application of what you have learned and exactly how these benefits arose.

### Self learning and awareness

What did you learn about yourself as you progressed to Fellowship? As is stated later, this is the main reason why the SPD can fail. This self analysis is important although it can be difficult to undertake. It should include ‘soft’ facts such as how you dealt with both negative and positive experiences as well as ‘hard’ facts such as your achievements.

### Key skills and knowledge acquired

During your time on the Fellowship programme you will have learned a number of new skills and increased your knowledge base. List the main items. This evaluation stage deserves special attention as it produces a summary of achievements, which demonstrates how you met your original objectives. For any area where you achieved less than you originally planned, reconsider whether the target originally set remains valid or whether you simply require more time to achieve it.

### Intentions for the future

Continuous Professional Development is key to your ongoing professional development. Now that you have undertaken a major achievement and obtained new skills and knowledge through a planned programme you will need to continue your CPD programme. In this section, set out how you plan to use the lessons of your Fellowship programme in the future.

### Finally – Points to note about the SPD

Before writing your SPD you may find it helpful to ask yourself the following questions:

- What were the most important things I learned
- and why were they the most important?

- How will I apply new skills and knowledge in my work?
- In analysing the application of these new skills and knowledge, can I produce evidence of the circumstances in which they are applied?
- What other reading and CPD have I done and will do outside my Fellowship plan to improve myself further and what do I now need to do for the future to continue my development as my career progresses?

The members of the Fellowship Assessment Board evaluate every SPD very carefully. The most common reason why a SPD fails to meet the required standard is because it does not demonstrate the candidate's self awareness. It is vital that your application illustrates what you have learned and in particular what you have learned about yourself as a result of negative experiences. You should not be afraid of admitting that you have learned from your mistakes as well as your achievements.

In fact, such candid self-awareness is extremely valuable.

It is important that you include sufficient information in your SPD to enable the Fellowship assessors to evaluate your application. Any other correspondence between you and the CII will be kept separate from your application and so the SPD must cover any issue which you feel is relevant to your application. You must include sufficient detail to demonstrate that you have completed all the steps to Fellowship and you should identify how the elements of the application have been useful to you in your work. The Fellowship assessors will also wish to see you demonstrate your ability to reflect on what you have achieved and how you will move your career forward. However, it is not a career update.

Examples of approved SPDs can be found online at cii.co.uk/fellowship.

# Step 7 – Application for election to Fellowship

## Applying for election to Fellowship

You can apply once you have received a result for the Steps 3 & 5 of the Fellowship program. Please ensure that your major achievement and SPD have been completed as you will need to submit these on the RevisionMate portal which you will receive details for via email, once your election form and payment have been received. Ensure your Fellowship Plan (Section D from the enrolment form) is submitted with your Election to Fellowship Form.

Once we receive your election to Fellowship application form and payment of your election fee we will send you an acknowledgement which will include details for the RevisionMate portal.

### Applying for Chartered Status

When you apply for Fellowship you are encouraged to hold a Chartered title and to abide by the regulations applying to Chartered title holders. If you do not already hold a Chartered title you should consider whether to apply for one when you apply for Fellowship. A Chartered title with the FCII designation shows the world that you have attained and maintained the highest and most prestigious level of professional achievement.

There are five Chartered titles: Chartered Insurer, Chartered Insurance Practitioner, Chartered Insurance Broker, Chartered Insurance Risk Manager, Chartered Insurance Underwriting Agent and Chartered Financial Planner. To find out more, visit www.cii.co.uk/membership/join-us/chartered/

Our member CPD requirements are the same for all qualified members, including Chartered individuals and Fellows.

## Fellowship assessment dates

Fellowship election applications are assessed on a quarterly basis. You should ensure that your completed application is received by the CII by one of the following closing dates each year:

- 01 February
- 01 May
- 01 August
- 01 November

If there is sufficient demand, we may hold additional assessment boards. Contact the FAS for further information.

Applicants will be advised of their result approximately **10 weeks after the closing date.**

## Assessment

All Fellowship applications will be assessed by specially trained Fellows. Three assessors will be appointed to review and evaluate your application. Each assessor receives a copy of your major achievement and your statement of personal development. Your application will be assessed against the fixed assessment categories set by the Fellowship Assessment Board, described in these guidelines.

The assessors will produce reports for the Fellowship Assessment Board which ensures consistency and standards.

From time to time we may ask a candidate to come for an interview before a recommendation is made. If you are called for an interview we pay all reasonable expenses incurred, which are agreed with you beforehand.

## If you succeed

You will receive written confirmation that you have been elected as a Fellow and are entitled to use the designatory letters, FCII, a right that belongs only to members who maintain this status by annual subscription and Continuing Professional Development.

Your Fellowship Diploma will be provided to you approximately 10 weeks later.

Each year the best Fellowship submission will be awarded the CII's Rutter medal and a cash prize. Associates and Fellows are also eligible to enter for the Morgan Owen essay competition, a prize given to the best essay entered.

For more details on prizes, including previous winners, visit www.cii.co.uk/about-us/initiatives/engagement/awards/.

## If you do not succeed

If you do not succeed you will receive a letter, which includes assessors' comments on why your application has been unsuccessful and advice on what further action you need to take.

Your application might not be accepted because of something that you could easily remedy. In this case, you may re-submit your application once this has been put right.

However, more major remedial work might be required. For example:

- the content of your dissertation does not meet the required standard. You may revise the dissertation, submit a new one or select a different major achievement option;
- the content of your project report does not meet the required standard. This may be because the project report is judged not to have included sufficient detail, because your part in it is not sufficiently great or because of shortfalls in your report on the project. We will write to advise on what you need to do. In some cases, you may have to submit a report on an additional project or start afresh with a different major achievement;
- your published works do not meet the required standard. You may either submit an alternative work or works or choose a different major achievement.

**☆ Important:**
Please note that it is not possible to 'top-up' a deficient major achievement with part of another type of major achievement.

For example, if your dissertation is at fault, you cannot submit a published work to raise it to the required standard.

**☆ Important:**
Please note: All re-submissions must be accompanied by an additional election fee.

Your SPD is the final step in the process before applying for election to Fellowship and, in the event that your major achievement is unsuccessful, you will need to review and submit an updated SPD along with your new or revised major achievement for assessment.

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