Harmonized Life Insurance Licensing Qualification Program

Stakeholder Information Session
April 9, 2013
AGENDA

1. Completed Tasks
2. Workshops: Points of Interest
3. Draft Competency Profile
4. High-Level Overview: Timeline & Next Steps
5. More Detail on Development Process & Next Steps
6. Wrap-up and Questions
COMPLETED TASKS

- Licensee workshops for occupational analysis
- Draft competency profile
- Legal agreement between provinces
WORKSHOPS: Points of interest

- No major differences in job tasks across provinces
  - Why bother with such a review?

- Large gaps in understanding about law issues

- Students being advised to skip sections of course
PROGRESS TO DATE – Draft Competency profile

- Competency profile
  - Drafted to cover full scope of OAW discussions without reproducing participants’ contributions textually.
  - Distributed to: stakeholder groups (with invitation to share), workshop attendees, all licensees in some jurisdictions.
  - Translation question: published material is drafted in both English and French, rather than being translated

- Review of Competency profile
  - Survey created to collect feedback from stakeholders – link available on CISRO website.
  - To date, over 700 responses from stakeholders representing 9 provinces and territories – large majority feel that the profile is coherent and that its scope is appropriate.
  - Survey will be closed on April 30th – responses will be analyzed to finalize the profile.
# COMPETENCY PROFILE vs. CDD

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Profile</th>
<th>CDD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purpose</strong></td>
<td>Draw a full portrait of the profession, at career entry–level</td>
<td>Target competency components related to consumer protection that need to be mastered and thus evaluated for career entry</td>
</tr>
<tr>
<td><strong>Source</strong></td>
<td>Occupational analysis workshop (OAW) discussions; survey feedback</td>
<td>Competency profile and data collected on products sold</td>
</tr>
<tr>
<td><strong>Scope</strong></td>
<td>All tasks and operations that an agent may accomplish</td>
<td>Only those tasks and operations that are deemed essential for career entry and that will be evaluated by the licensing exams</td>
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</tbody>
</table>
## COMPETENCY PROFILE vs. CDD (cont’d)

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Profile</th>
<th>CDD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level of detail</td>
<td>Relates to all products without specific references</td>
<td>References to specific products and other details relevant to understanding of evaluation targets</td>
</tr>
<tr>
<td>Purpose for Course Providers</td>
<td>Added value in developing training in areas that are not included in the CDD</td>
<td>Essential to ensure training adequately prepares candidates for licensing exams</td>
</tr>
<tr>
<td>Key Milestone or Activity</td>
<td>Target Date/Period</td>
<td></td>
</tr>
<tr>
<td>------------------------------------------------------------------------------------------</td>
<td>---------------------------</td>
<td></td>
</tr>
<tr>
<td>End of feedback period for Competency profile</td>
<td>April 30th 2013</td>
<td></td>
</tr>
<tr>
<td>Release of Competency profile revised according to stakeholder comments</td>
<td>May 2013</td>
<td></td>
</tr>
<tr>
<td>Release of draft Curriculum Design Document (CDD) for stakeholder comment</td>
<td>June/July, 2013</td>
<td></td>
</tr>
<tr>
<td>Release of CDD revised according to stakeholder comments</td>
<td>August/September 2013</td>
<td></td>
</tr>
<tr>
<td>Release of editing plan, recognition criteria and licensing agreement</td>
<td>Fall 2013</td>
<td></td>
</tr>
<tr>
<td>Key Milestone or Activity</td>
<td>Target Date/Period</td>
<td></td>
</tr>
<tr>
<td>-------------------------------------------------------------------</td>
<td>--------------------------</td>
<td></td>
</tr>
<tr>
<td>Recognition of course providers</td>
<td>As of April 2014</td>
<td></td>
</tr>
<tr>
<td>Publication of study materials for recognized course providers</td>
<td>January 2015</td>
<td></td>
</tr>
<tr>
<td>Program implementation</td>
<td>September 2015</td>
<td></td>
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</tbody>
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STEPS OF DEVELOPMENT

OAW

Competency profile

CDD

Development of guidelines, policies and agreements

Recognition of course providers

Editing plan

Publication of study materials

Exam questions and formats
NEXT STEPS – 2013

- Publication of finalized Competency profile
  - Profile will be revised according to stakeholder feedback.
  - Profile will be used to set modules for CDD, study material and exams.

- Ongoing recruitment of content experts for drafting of CDD, editing plan and study material
  - Selection based on product knowledge, experience in the field (sales experience preferred over supervision experience) and written communication skills.
  - Targeted professionals: OAW participants, agents active in the field, stakeholder representatives (e.g.: trainers or course material developers) from across Canada.
  - Role of stakeholders in identifying content experts.
NEXT STEPS – 2013 (cont’d)

- **Drafting of CDD**
  - Process will be structured according to decisions about modules, as defined through the competency profile.
  - One content expert committee per module; each committee will be comprised of 7-10 experts from different provinces and different professional backgrounds.

- **Stakeholder review of CDD**
  - Process will be similar to that used for competency profile: survey accessible through CISRO website.
  - Timing of next stakeholder information session?

- **Publication of CDD**
  - CDD will be revised according to stakeholder feedback.
Drafting of editing plan
- Will proceed similarly to drafting of CDD: content expert committees for each module.
- No stakeholder review planned but publication by end of year to facilitate Course Providers’ course preparation.
- As plans are finalized, drafting of the study material will begin.

Drafting of Course Provider recognition criteria and licensing agreement
- Current criteria and agreements will be taken into account.
- Recognition criteria should be built into agreement.
NEXT STEPS 2014–2015

- Decisions about exam delivery.
- Course development and roll-out to course providers.
WRAP-UP

- CISRO remains committed to ongoing stakeholder engagement throughout development and implementation of new program.

- Information will be made available to stakeholders as work on this initiative continues.

Inquiries
- New program – Ron Fullan
- Existing LLQP – Pat Chamberlain
- Existing AMF Program – Rene Brisson