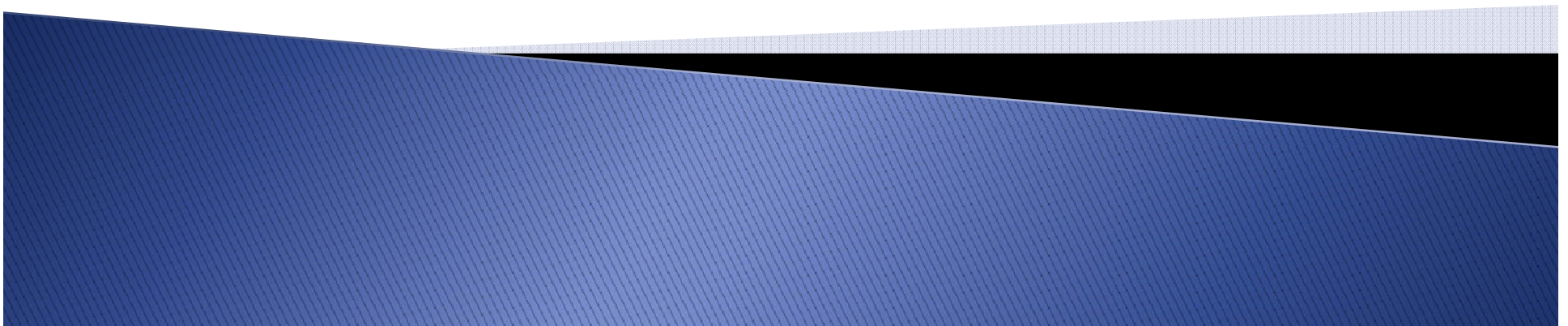


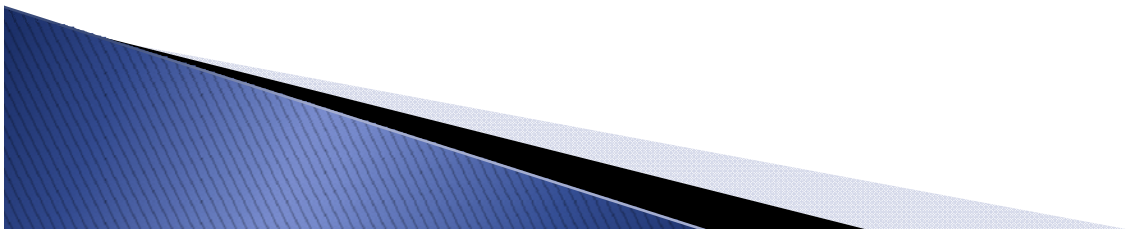
Harmonized Life Insurance Licensing Qualification Program

Stakeholder Information Session
April 9, 2013



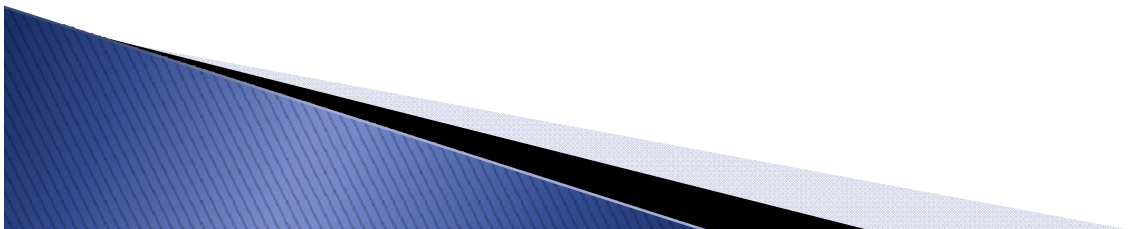
AGENDA

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



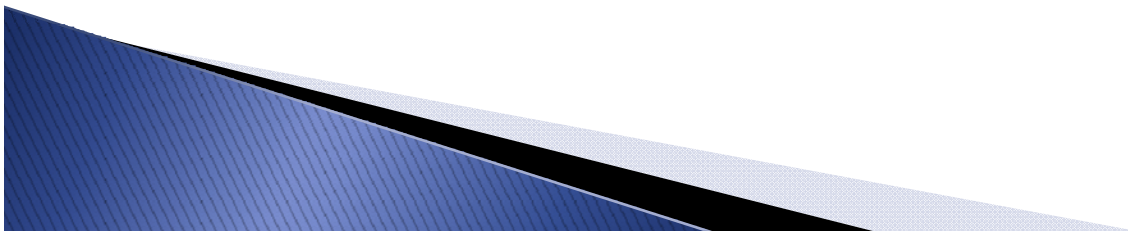
COMPLETED TASKS

- ✓ Licensee workshops for occupational analysis
- ✓ Draft competency profile
- ✓ Legal agreement between provinces



WORKSHOPS: Points of interest

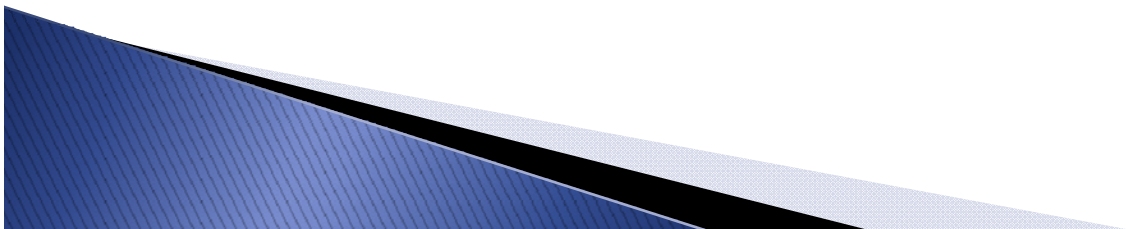
- ▶ No major differences in job tasks across provinces
 - Why bother with such a review?
- ▶ Large gaps in understanding about law issues
- ▶ Students being advised to skip sections of course



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.

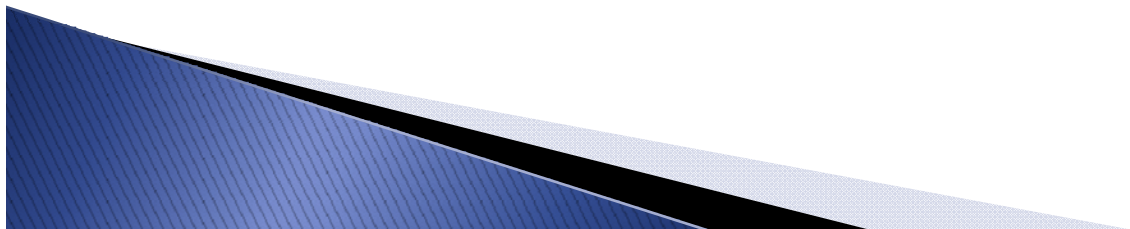


COMPETENCY PROFILE vs. CDD

Characteristics	Profile	CDD
Purpose	Draw a full portrait of the profession, at career entry-level	Target competency components related to consumer protection that need to be mastered and thus evaluated for career entry
Source	Occupational analysis workshop (OAW) discussions; survey feedback	Competency profile and data collected on products sold
Scope	All tasks and operations that an agent may accomplish	Only those tasks and operations that are deemed essential for career entry and that will be evaluated by the licensing exams

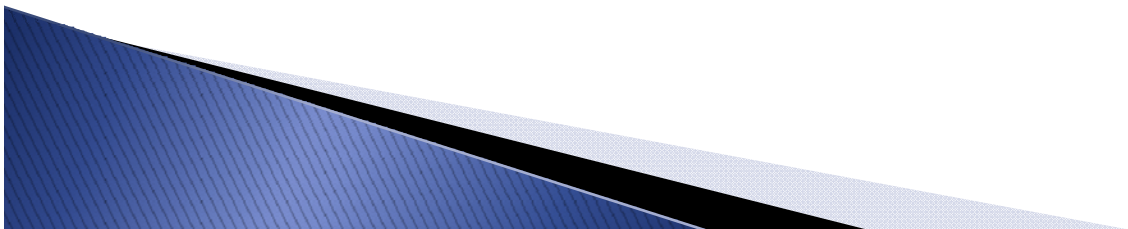
COMPETENCY PROFILE vs. CDD (cont'd)

Characteristics	Profile	CDD
Level of detail	Relates to all products without specific references	References to specific products and other details relevant to understanding of evaluation targets
Purpose for Course Providers	Added value in developing training in areas that are not included in the CDD	Essential to ensure training adequately prepares candidates for licensing exams



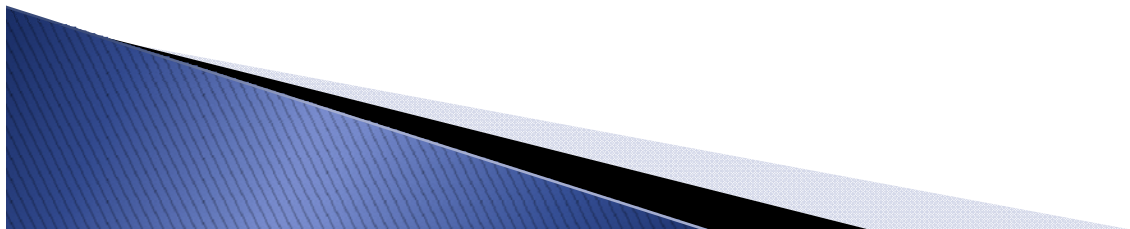
TIMELINE – 2013–2014

Key Milestone or Activity	Target Date/Period
End of feedback period for Competency profile	April 30 th 2013
Release of Competency profile revised according to stakeholder comments	May 2013
Release of draft Curriculum Design Document (CDD) for stakeholder comment	June/July, 2013
Release of CDD revised according to stakeholder comments	August/September 2013
Release of editing plan, recognition criteria and licensing agreement	Fall 2013

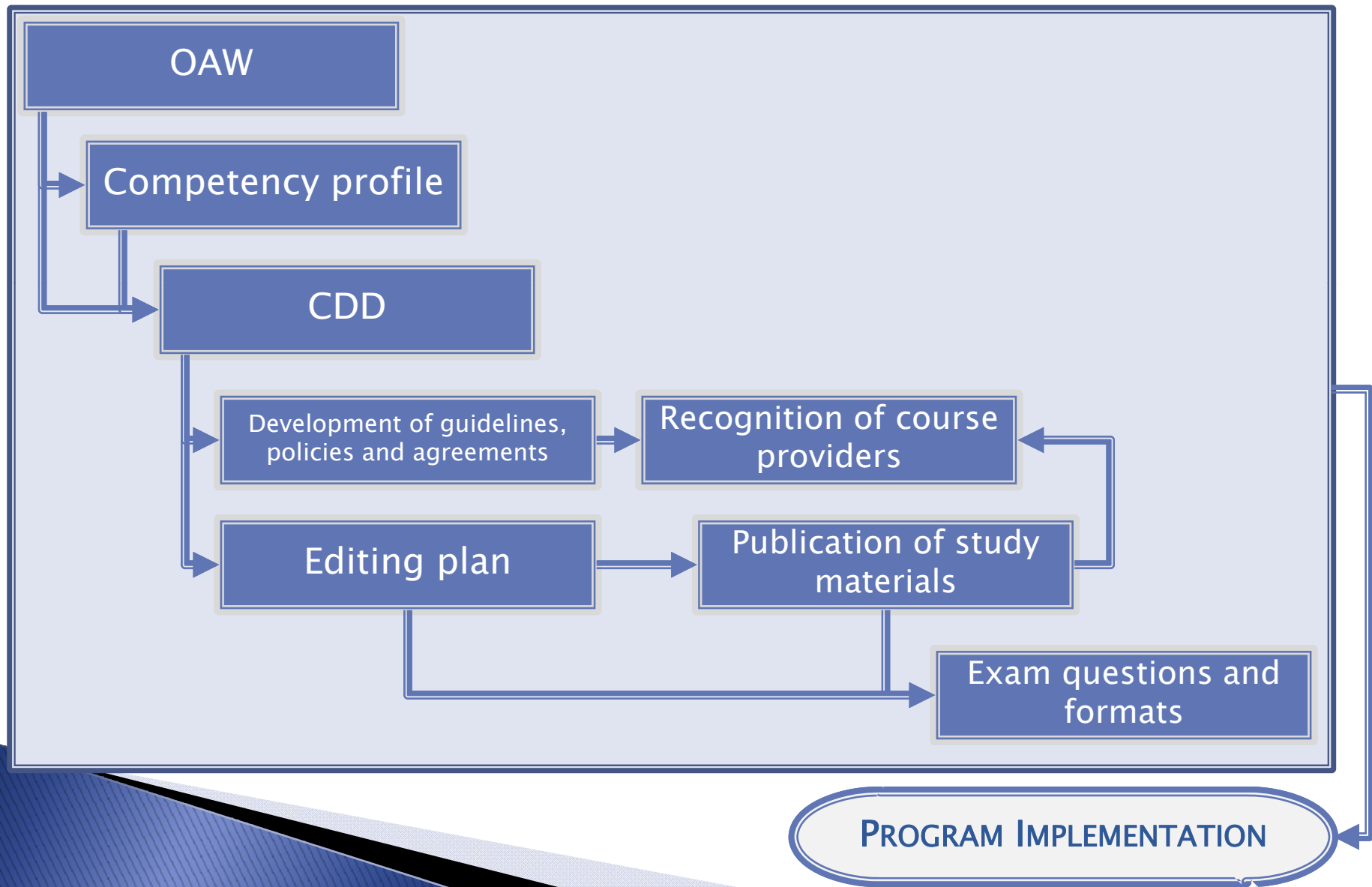


TIMELINE – 2014–2015

Key Milestone or Activity	Target Date/Period
Recognition of course providers	As of April 2014
Publication of study materials for recognized course providers	January 2015
Program implementation	September 2015




STEPS OF DEVELOPMENT



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.

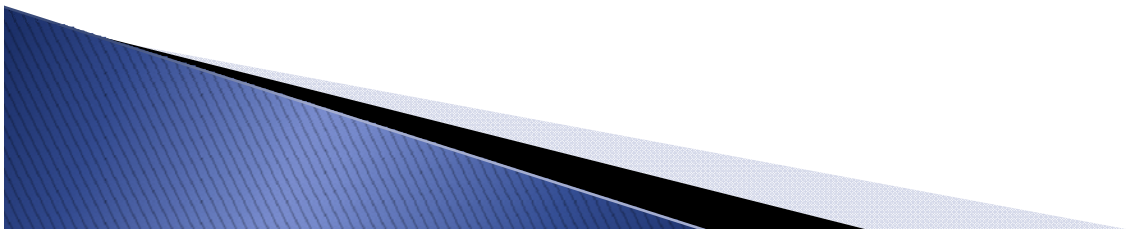
 - ▶ Ongoing recruitment of content experts for drafting of CDD, editing plan and study material
 - Selection based on product knowledge, experience in the field (sales experience preferred over supervision experience) and written communication skills.
 - Targeted professionals: OAW participants, agents 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?

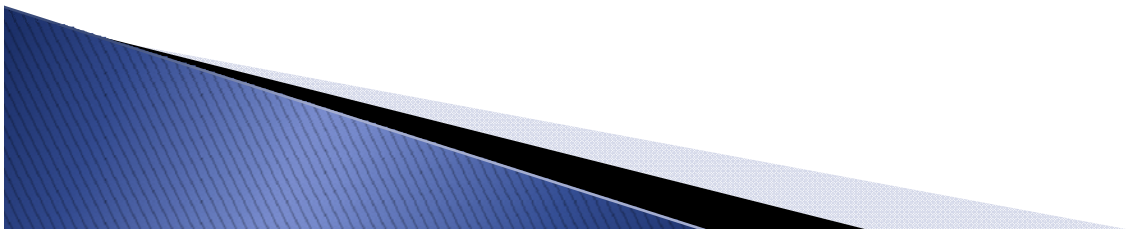
- ▶ Publication of CDD
 - CDD will be revised according to stakeholder feedback.



NEXT STEPS – 2013 (cont'd)

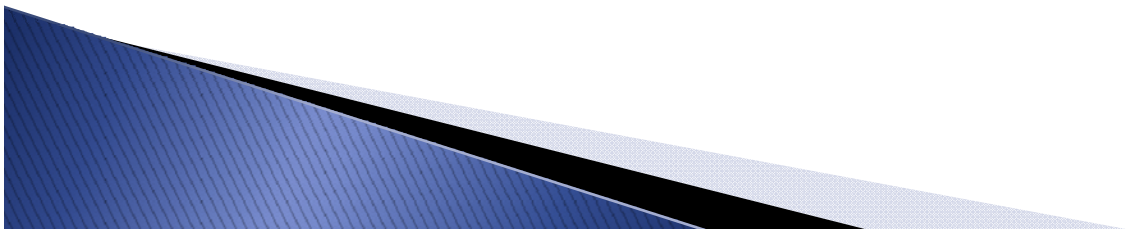
- ▶ Drafting of editing plan
 - Will proceed similarly to drafting of CDD: content expert committees for each module.
 - No stakeholder review planned but publication by end of year to facilitate Course Providers' course preparation.
 - As plans are finalized, drafting of the study material will begin.

- ▶ 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

