

Your Institute

2018 Annual Update



Chartered Banker

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Editorial from Simon Thompson



Welcome to the first edition of 'Your Institute', our new, dedicated publication for Chartered Banker members.

Thank you for your continued membership, participation and support. As a member, you are helping to maintain and champion the highest ethical, professional and customer-focused standards within the industry.

We constantly aspire to enhance the value and benefits of your membership and through 'Your Institute' and other channels, make you aware of all the opportunities available to you as a Chartered Banker member.

In our first edition, we take a look back at some highlights of our progress over the past financial year – and what a busy year it's been!

We have focused on four key areas: expanding our international reach and influence; enhancing our channels and content – with a particular focus on digital; adding to the professional development opportunities we offer our members, and promoting diversity both within our membership and throughout the banking profession as a whole.

A particular highlight was the launch of our 2025 Foundation in October.

Through the Foundation we aim to identify and support talented young people, who would benefit from financial and other support to pursue a career in banking.

This year is going to be just as busy as last year, if not more so. We will launch our new Green Finance Certificate, as well as a new Ethics & Integrity assessment – mandatory for all new members – and also open to existing members who wish to develop their ethical and professional judgement. Finally, in the autumn, we will also launch our substantially revised and refreshed Chartered Banker Diploma, which focuses on bank management, strategy and practice in a digital age.

We hope you'll agree that there are now more reasons than ever to be a Chartered Banker member – we look forward to shaping the future of banking together in 2018.



Simon Thompson
Chief Executive of the Chartered Banker Institute

✉ We'd love to hear your feedback on 'Your Institute', share your thoughts at:
info@charteredbanker.com

Following our Annual General Meeting (AGM) in June 2017, we can confirm that the governance reforms were approved – thank you to all members. We are also delighted to announce that Robert Dickie was appointed as our new President for 2017-2019. View full details of the AGM, including approved reforms at: www.charteredbanker.com/AGM

International

The world's our oyster: international highlights of 2017



Did you know, that we have members in 87 countries, including the UK? Over the last financial year, we have worked closely with professional bodies across the world and our UK university learning partners, to increase the international reach of our qualifications and recognition for our members.



We have signed a Mutual Recognition Agreement (MRA) with the Indian Institute of Banking & Finance (IIBF) – the world's largest banking institute, with more than 750,000 members. This will create improvements in international education and career opportunities for bankers and financial services professionals worldwide. The initial practical aspect of this MRA has seen the creation of a professional conversion route to Chartered Banker status for Certified Associates of the Indian Institute of Bankers (CAIIB).



In partnership with two of the other leading Chartered professional bodies in the sector, The Chartered Insurance Institute and the Chartered Institute for Securities & Investment, we launched the Chartered Body Alliance (the Alliance), to help consumers recognise the benefits of engaging with qualified sector professionals.



A new partnership with the Financial Services Institute of Australasia (FINSIA), will see the launch of a FINSIA version of our Professional Banker Certificate. Renamed 'Professional Banking Fundamentals', it will launch in Australia and New Zealand in the spring.



And finally, we have signed a new and revised Mutual Recognition Agreement, following the launch of the 'Certified Banker' qualification with The Hong Kong Institute of Bankers (HKIB).



Digital improvements



Changing channels: digital first

Throughout 2017 and early 2018, we have continued to invest in all our communication channels.

However, with 31,500 members in 87 countries, the one place where we can guarantee that all our members have the opportunity to engage is online. As such, we have concentrated the majority of our investment in our digital channels.



YouTube

We've given our YouTube channel a makeover, and you can now find recordings of some of our live events on there, including our AGM, for the first time.

Subscribe to [@charteredbanker](#) to keep up to date.



Webcasts

Our live webcast series continues to be a popular and highly-rated addition to our Continuing Professional Development (CPD) offering, with almost 3,300 subscribers worldwide and average quality ratings of 4 out of 5.

In 2017, we hosted nine webcasts based on members' preferences and industry hot topics, and following our last AGM, we held our first live webcast of a lecture. Miles Celic, Chief Executive of TheCityUK, joined us to talk about their preparations for Brexit and to share his own personal insights into the topic.

To view or subscribe to our webcast channel please go to: <http://bit.ly/1V60T7e>



Magazine podcasts

We have also expanded our podcast series to include the 'Special Reports' and other content from our Chartered Banker magazine – our most-used and valued CPD resource.

To access our podcasts please visit: www.charteredbanker.com/podcasts



Our new website

Following member research, we identified the need to improve our website, including the navigation, and have worked with digital agency, Pixl8, to engage in detailed user experience testing to help inform our new, improved website, which launched in early 2018.

Our new website features an advanced knowledge hub, improved navigation, increased CPD resources, greater accessibility and the ability to favourite resources. If you've not visited yet, what are you waiting for?

Head to: www.charteredbanker.com

Professional development



Every day's a school day: professional development enhancements

In 2017, we worked hard to enhance the resources that we offer to members to allow them to progress their professional development and professional status.



New online exam booking system

Last September, the Institute moved to learndirect for the provision of our UK exam services and exam booking system. The new system offers an automated, online exam booking service for our students, as well as instantaneous exam confirmations.



The move to learndirect has many benefits for our members, who can now:

- Book their exams from 3 days to 12 weeks in advance
- Reschedule without penalty up to 3 days before an exam
- Cancel without penalty up to 3 days before an exam (cancellations with less than 3 days' notice are fully chargeable)
- Receive immediate booking confirmations for all exams.



Online resource library

Our online library of resources is designed specifically to help members maintain their professional skills and technical knowledge, whatever their learning style.



Continuing Professional Development (CPD)

Our focus for CPD has been to continue to act on member feedback in relation to resources, delivery, methods and accessibility, allowing us to make the following improvements:

- The introduction of six interactive 'Ethical Dilemmas' to the e-CC toolkit
- The introduction and refresh of 10 'Management 101' e-learning modules to the e-CPD toolkit
- Regular updates of topical content within the e-CPD toolkit.

We also ran a CPD survey early last year to help us understand members' needs and how we could support these. Findings revealed a desire for more career development resources, which we have initially responded to with a career development social campaign, which has proven to be very popular.



Mentoring

Following feedback from our members, we were delighted to launch the Chartered Banker Mentoring Scheme last year – available to all Chartered Banker members. Here’s how some of those who have taken part felt it helped their professional development.

“The Mentoring Scheme has enabled great conversation with someone who has a lot of experience in the sector. I have received good advice on how to reach my career goals and have also been put in contact with others to discuss potential opportunities. I would strongly recommend the scheme to others.”

Scott Nicholls,
Mentee



“Becoming a mentor has allowed me to give something back to the next generation of professional bankers; to pass on the experience I’ve acquired in the industry and to press home the importance of professionalism. My advice for a new mentee is to be clear as to what you want to get from your interaction with your mentor. The Mentoring Scheme is a great opportunity to enhance your professional network.”

Alasdair McIntyre (Chartered Banker, FCIBS),
Mentor

To find out more about our Mentoring Scheme please go to:
www.charteredbanker.com/mentoring

Diversity

Changing the face of banking: the importance of diversity

At the Institute, we are committed to changing the face of banking. We want to make the industry more accessible by supporting a more diverse range of people to enter the profession, as well as supporting their ensuing career progression.

Diversity Survey

We undertook this survey to hear people’s views on career progression and gender balance within the workplace to understand how the Institute can support its members.

Chartered Banker 2025 Foundation Launch – giving the opportunity, changing lives

Formally launched in October 2017 at the Bank of England, the 2025 Foundation aims to identify and support talented young people who would benefit from financial and other support to pursue a career in banking.

The Foundation has been set up in anticipation of the Chartered Banker Institute’s 150th anniversary in 2025 and will be aligned with the original aims of the Institute – the promotion of education and development for young bankers entering the profession.

To find out more on how you can support this valuable initiative, please visit: www.charteredbanker.com/2025foundation



Insights: Young Banker of the Year Competition



Congratulations to Joanna Finlay from Virgin Money, who was named the 2017 Chartered Banker Young Banker of the Year.

The Chartered Banker Young Banker of the Year Competition (YBOTY), our annual flagship competition, aims to showcase future leaders in UK banking. The challenge set for our entrants is designed to test their capacity to put customers first, and generate new ideas, demonstrate social purpose, drive, innovation and sustainable growth.



We caught up with Institute member and YBOTY 2015 finalist, Lee Johnston, to find out how taking part in the competition and his subsequent Chartered Banker membership has helped to shape his career.

Did taking part in the competition help your career?

Absolutely, it gave me a profile within the bank. Since there are so many well-educated and experienced people in the banking world, this point of differentiation was more valuable than ever.

What skills did you gain from the competition?

It's one thing to take part in a bank-wide project or to support senior leaders in their strategies but the competition taught me the ability to take forward my own idea and research it, without an existing framework – a skill I didn't have.

What was the best experience for you in the competition?

Standing up to give the presentation. I think it's fair to say my heart was pounding at the time, but it was an experience like no other, to talk about your own idea with some of the most distinguished people in banking listening.

Would you recommend the competition to others?

I would, in the strongest terms. It's good for your CV, your development, your profile and is also good fun.

What advice would you give to future applicants?

Be bold, go for an idea you are really interested in, not what is safe or comfortable.

How have you found being an Institute member and gaining a qualification?

I completed the Certificate of Lending qualification and use it every single day when looking at what facilities we can offer customers. In fact, I've found it so useful I've already put myself down for the Diploma.

To find out more about the competition please visit:
www.charteredbanker.com/youngbanker

Or email: youngbanker@charteredbanker.com

Update membership details

Are your details up to date?

Please take a moment to update your details, if required. As a member you have access to many benefits and we would like to keep you up to date on these, but for this we need the right contact details.

Benefits include:



Professional insight: Access to trusted information sources, such as our bi-monthly magazine and monthly newsletter, helping to keep you informed of important issues in the sector.



Mentoring Scheme: Members can request to be mentored by a senior professional who holds a position they are interested in and can share their knowledge and experience.



Professional development: Unlimited access to a wide range of online CPD resources to support you in your professional development, including reference books, articles, videos and e-learning.



Webinars: Access to interactive presentations, covering popular topics and themes.



Volunteering opportunities: As a member, you can raise your professional profile and contribute to the work of the Institute to enhance and sustain professional standards in banking, and pride in the banking profession. This includes speaking at Institute events, writing content, joining a committee, volunteering for the Institute's Mentoring Scheme or completing a survey.



Networking events: Access to powerful networking opportunities with banking colleagues. You are an active participant in our rapidly growing professional network, allowing you to gain contacts to help build and sustain your career and identify new business opportunities.

To update your details please log on to the member section of our website:
www.charteredbanker.com/update-your-details



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Or alternatively, please email us at: **info@charteredbanker.com**

Drumsheugh House

38b Drumsheugh Gardens
Edinburgh
EH3 7SW

Telephone: 0131 473 7777

Email: info@charteredbanker.com

Web: www.charteredbanker.com

London office:

2nd Floor, Bengal Wing
9a Devonshire Square
London
EC2M 4YN

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