

Your Institute

Annual Update 2018 - 2019



Chartered Banker

Contents

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Editorial from Simon Thompson	3
International	4
Digital improvements	5
Professional development	6
Conduct and culture	7
Volunteering	8
Insights: Young Banker of the Year Competition	10
Update membership details	11

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Editorial from Simon Thompson

Welcome back to **Your Institute**, our dedicated publication for Chartered Banker members, a year on from launch...



Pulling together our second edition of *Your Institute* really brings home just how much we've achieved as an Institute towards our shared goal of helping to maintain and champion the highest ethical, professional and customer-focused standards within the industry, over the past year.

The Institute could not be what it is, or achieve what it does, without the participation and support of you, our members. So first and foremost, a sincere thank you for your continued commitment.

To make sure you get the most from your membership and your career, we continually aim to enhance the professional development opportunities open to you. I hope you will find lots to inspire you in this edition of *Your Institute*.

I am particularly proud that over the past 12 months we have launched two new qualifications: Chartered Banker by Experience and the Green Finance Certificate.

With the devastating impact of unchecked climate change finally coming to the forefront of media headlines, it feels particularly fitting to have launched the world's first benchmark qualification in *Green Finance*, helping to create a generation of finance professionals ready to lead the way in developing truly sustainable banking.

As well as launching these two new qualifications, we have also given our flagship qualification, now called the *Advanced Diploma in Banking and Leadership in a Digital Age*, a more user-friendly digital focus, in-keeping with our new qualifications.

Working on increasing our reach and enhancing our membership experience internationally also continued to be an important focus in 2018, with partnerships such as the one with FINSIA, playing an important role in widening access to our qualifications in our 87 member countries.

As we now look ahead to the coming year, our prominent theme running through all we do, from our services to our events, will be 'the future of banking' – 2019 promises to be an exciting and enlightening year, with a strong focus on emerging trends in the sector.

In the more immediate future, I hope you enjoy finding out more about the opportunities open to you as a Chartered Banker member in this booklet and feel inspired to explore the **Chartered Banker website** to find out more.

Thank you once again for your invaluable contribution to making 2018 such a fantastic year; here's to more of the same in 2019.

A handwritten signature in black ink, appearing to read 'Simon Thompson'.

Simon Thompson
Chief Executive of the Chartered Banker Institute



International



Our global presence continues to grow

Working with professional bodies, UK university partners and over 100 banks worldwide, our international reach continues to grow. Did you know we have members from 87 countries across six continents, with the number of people studying for Chartered Banker qualifications increasing year on year?

In addition, we have partnerships with professional bodies across the world, including Australia, Malaysia, India, Nigeria, Hong Kong, Pakistan, Ireland, The Bahamas and Malta.



Financial Services Institute of Australasia (FINSIA)

In partnership with the Financial Services Institute of Australasia (FINSIA), we have produced a FINSIA version of our Professional Banker Certificate, called Professional Banking Fundamentals, which was launched in May 2018.

We are delighted that FINSIA are also offering Chartered Banker by Experience, our experiential route to Chartered Banker status.



Digital improvements

Last year was a big year of digital transformation for the Institute, as we invested heavily in our communications channels. Our new website and refreshed YouTube channel, podcasts and webcasts are now well embedded, allowing us to focus on establishing and improving additional channels.

In 2018, we:



Rolled out our much-anticipated Mentoring Platform. Find out more about the Platform and our mentoring programme on Page 8.



Continued to support our members' career development through our **Job Board**. Searching and applying for jobs is confidential, quick and straightforward, and members can create a personal account, upload an anonymous public or private CV and create alerts.

Go to: jobs.charteredbanker.com to try it out.



Following member consultation we have created a stronger, more integrated online presence for our new-look *Chartered Banker* magazine including regular blog posts and 'readymag' formats of special reports. From the beginning of 2019, we'll also be moving to a 64-page quarterly format, including more international features, opinion pieces and regular member contributions. Plus, we'll be introducing a quarterly e-newsletter to share highlights from Chartered Banker and continuing to record an audio version of the magazine, so you can listen to it on the move.

Professional development

Professional development is at the heart of our offering to members. The past year has seen the launch of some exciting new opportunities. Take a look at how you could enhance your professional status in the year ahead.

Chartered Banker by Experience

This new, flexible accelerated route to Chartered Banker status offers experienced banking professionals the opportunity to get there in three simple steps, in as little as 12 weeks.

Green Finance Certificate – a world first!

In July 2018, we were extremely proud to launch the world’s first benchmark qualification for Green Finance.

Successfully embedding green finance at the heart of the financial services sector requires developing the capabilities of significant numbers of green finance professionals not only in the UK, but globally.

Our vision is that the Green Finance Certificate supports these individuals to develop and demonstrate the specific knowledge and expertise needed to lead the way in mainstreaming green finance. Once qualified, finance professionals will be confident in directing investments to support transition to a low-carbon world, addressing climate-related risk, and exploring green finance opportunities.

“Advances in regulation, technology and customer expectations are rapidly changing the banking environment.”

To find out more about our qualifications visit our website:
www.charteredbanker.com/ourqualifications

Advanced Diploma in Banking and Leadership in a Digital age

The *Advanced Diploma in Banking and Leadership in a Digital Age* (formerly known as the Chartered Banker Diploma) is the Institute’s gold standard qualification. Leading to Chartered status, it is recognised globally as setting the standard for individuals and firms seeking to achieve the highest level of excellence and professionalism in banking.

Advances in regulation, technology and customer expectations are rapidly changing the banking environment, and the *Advanced Diploma in Banking and Leadership in a Digital Age* builds the capability of current and future banking professionals to respond to these advances. The qualification develops strategic judgement and expertise in an increasingly digital environment, alongside developing core banking skills in areas including credit and risk.

On completing the qualification, learners become qualified Members of the Institute, entitled to use the professional designation Chartered Banker and the designatory letters MCIBS after their name, demonstrating expertise and a commitment to personal development and professionalism.



Conduct and culture

We’re making it easier for our members to Speak Out

It is vital for banking professionals – and the wider industry – to have options to understand how to report wrongdoing in the workplace. As the largest professional body for bankers in the UK, we have a responsibility to make sure that our members have a ‘safe’ forum to raise concerns, as well as to discuss any professional ethical dilemmas, and whether or not to report them if unsure.

Our new initiative, *Speak Out*, launched in September 2018, is aimed at providing an alternative route for members to air professional concerns and receive signposting support about workplace issues.

Please make sure you familiarise yourself with how to *Speak Out* at:
<https://cbi.cathartic.co>

Volunteering

Have you checked out our new Volunteering Hub?



Our Volunteering Hub provides opportunities for our members to get involved in supporting the wider banking community and society, by sharing knowledge and expertise and supporting financial education and the 2025 Foundation. Here's a snapshot of some recent updates and available opportunities.

My Skills and Future (formerly the FEP)



The My Skills and Future project, formerly known as the Financial Education Partnership (FEP), is administered by the Chartered Banker Institute and delivered by a team of dedicated volunteers. The project offers free workshops in financial capability and other related topics in schools, colleges and community groups across Scotland. It provides classroom support to teachers for meeting financial education Curriculum for Excellence objectives, while also providing a high-quality, interactive learning experience for pupils.

Find out how you can get involved at: www.charteredbanker.com/myskillsandfuture

2025 Foundation: mentors wanted



Are you an Institute member with 10 or more years' banking experience? If so, you could play a vital role in helping a young person (who may not otherwise have had the opportunity) to establish a banking career through our 2025 Foundation. We need mentors now, to support 2025 Foundation participants on their learning journeys.

If you have the experience required, find out how you can make a difference, at: www.charteredbanker.com/support

The Chartered Banker Mentoring Scheme



Our Mentoring Scheme is another way of demonstrating our commitment to our members' personal and professional development.

This January, we launched our new online Mentoring Platform, available to all Chartered Banker members. It allows you to create your own profile, browse other mentor and mentee profiles and manage all relationships, making the benefits of mentoring more accessible to all. We hope that everyone will take part, either as a mentee, a mentor, or both.

Check out our new platform: <https://charteredbanker.onpld.com>

Here's how Scott Nicholls, a recent mentee, found the experience:

"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."

Contact: mentoring@charteredbanker.com to find out more.

Insights: Young Banker of the Year Competition

Congratulations to Alistair Gilfillan from Lloyds Banking Group, who was named the 2018 Chartered Banker Young Banker of the Year.



"It's an honour to have won this year's competition. I wanted to develop an idea to make saving easy and achievable for vulnerable customers, which will reduce worries they have about money. It's a privilege for such experienced judges to see the potential of the idea, giving it weight as we continue to innovate within Lloyds Banking Group to help Britain prosper."

The Chartered Banker Young Banker of the Year Competition, our annual flagship competition, aims to showcase future leaders in UK banking. Our entrants are challenged to put customers first, generate new ideas, demonstrate social purpose, drive, innovation and sustainable growth.



We caught up with Institute member and YBOTY 2016 finalist, Liam Gover, 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 helped give me confidence to take on new challenges. I dropped it in to every other sentence when applying and interviewing for my new job as a Credit Partner in the Corporate and Commercial Banking division at Santander.

What skills did you gain from the competition?

For me, the whole process was very different to my day job and put me outside of my comfort zone, as I tried new things and had to dust off old skills that had not been used in a very long time. It was fantastic.

What was the best experience for you in the competition?

Pitching my idea to 200 peers from the industry was incredible and I also enjoyed meeting the other finalists. My favourite memory, though, was looking out into the audience during my presentation and seeing my former colleagues giving up their own time to support me.

Would you recommend the competition to others?

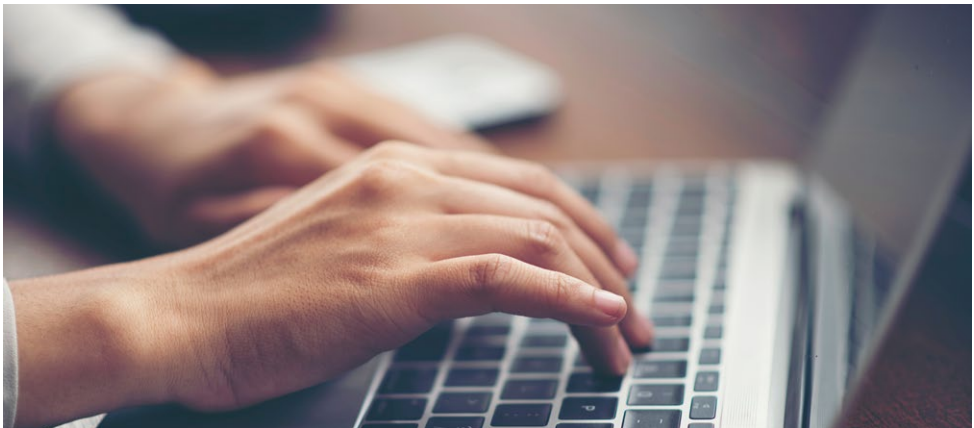
Very much so. I think the competition should be included in all new bank entrants' development journeys.

What advice would you give to future applicants?

Use your colleagues and network as sounding boards. You'll be surrounded by experienced people willing to give you their time, knowledge and support. Make the most of it!

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

My career has definitely benefitted. The qualifications have helped me to secure new roles and hit the ground running from day one.



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, however, we need your correct contact details to ensure this.

Your benefits include:



Professional insight: Access to trusted information sources, such as our quarterly 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.



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.



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.

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

Follow us on @charteredbanker



Stay connected

We would love to hear from you – please visit our **website**, **Facebook page**, **LinkedIn group** and **Twitter: @charteredbanker**

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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