

Insurance Practitioner Apprenticeship

Guide for Case Studies

September 2022

1. Purpose of Case Studies:

The purpose of this work-based syllabus is to ensure that each apprentice has the opportunity to apply the academic principles learned in the Professional Diploma in Insurance (CIP) modules in a practical work environment, bridging the gap between theory and practice.

Working with case studies offers opportunities to engage with the world of insurance business practice in a meaningful manner. This process of active learning also helps the apprentices to develop key skills in areas such as communication, writing and problem solving.

The overall aim of the case study approach is develop:

- **Individual study skills.** Case studies are an effective way of encouraging apprentices to carry out independent research outside of the lecture/book environment.
- **Information-gathering and analysis.** Many case studies require resource investigation and encourage apprentices to utilise a number of different sources, i.e. data files, procedural documents, Internet, specimen policies and contacting experts within the organisation or in industry.
- **Practical skills.** Some of our case studies involve practical work on the components that are being studied. Feedback shows that many apprentices learn effectively with the hands-on approach.

2. Completing and Submitting the Case Studies:

There are up to nine Work-Based Case Studies for each module. For CPI-01, 02 03 & 04, apprentices must choose any five Case Studies from the total on offer. For CPI-06, 07 & 08, four case studies should be chosen. Each one must be completed, marked and submitted by the specified deadline. **Please ensure that the Case Study Marking Form is completed correctly with all the mandatory sections completed before submitting it to Moodle.**

As far as possible, apprentices are expected to research within their own organisation (with guidance from their supervisor), cases, documents or other materials that can be applied to the questions raised. These should be real life examples that are relevant to the tasks. Some of the case studies may also require broader research.

The apprentice must then complete the tasks in the specified format. Brief guidance notes are included to ensure clarity about what the apprentice needs to do, and what the supervisor should look for when marking the work.

3. Role of the Supervisor in the Case Study Process:

Apprentices value the opportunities case-based learning offers to develop soft skills that are valued in the workplace, as well as skills in analysis, interpretation and decision making. The role of the Supervisor is to encourage and facilitate this process.

The supervisor is required to:

- locate or create suitable case studies (or other work-based materials)
- assess each apprentice's completed case study (on a pass or fail basis)

3.1 Locating or Creating Case Studies

The tasks within each case study allow apprentices to work on real-time cases (or other materials) from a variety insurance working environments. Supervisors are expected to locate or create suitable files or documents in advance of each assignment becoming due. The full set of case studies is provided early in each semester, to give adequate time for this preparation.

Some of the case studies have a broader base, requiring industry research (e.g. online). This helps to ensure that all apprentices can complete the required number of case studies, especially where the subject matter is not directly relevant to their work environment. In such situations, the supervisor should help the apprentices source suitable resources.

In exceptional cases, generic case files may be provided if suitable material is not available within the work environment. Supervisors should ask their apprentice to formally request the virtual case file from ATU Sligo only when this becomes necessary.

3.2 Assessment Framework - Pass/Fail:

The supervisor is required to mark the case study assessments to confirm the achievement of learning outcomes and record/exchange data as specified in the workplace assessment framework of the apprenticeship programme. It is not the role of Supervisors to complete the case studies for apprentices or prepare answers for them.

Each apprentice needs to develop their own 'voice'. There are no specific right or wrong answers against which apprentices are marked. The nature of work-based learning means that resources from the working environment are variable in their content. However, the insurance or regulatory principles being applied are consistently the same.

Each topic should be marked with a pass/fail and signed to confirm that, as a supervisor, you have assessed the content. To award a pass mark, the supervisor must verify that the apprentice made a reasonable attempt to answer the question, demonstrating they understand the principle in their response.

Three attempts are allowed and supervisors may offer guidance to help the apprentice gain a better understanding if their answer misses the point being asked. If an apprentice has not successfully submitted a case study to a standard that is awarded a pass mark by the supervisor after three attempts the apprentice will fail this case study and fail the module. The apprentice will have to re-submit the case study and register to repeat the module. The apprentice will not be awarded 5 ECT credits for this module unless all of their case studies have been passed and submitted.

Supervisors should remember that apprentices are attempting these types of cases for the first time. Language (plain but business-like English), spelling, grammar and layouts are as important as the content and the apprentice may need help in developing these skills. If there are problems in these areas, the supervisor should give guidance and ask the apprentice to make a second attempt.

A case study marking form is attached in **Appendix 1** for completion and sign off for each case study.

4. Advice on Data Protection:

Employers and supervisors must ensure that all work-based learning activities comply with the relevant Data Protection legislation and any other legal/regulatory requirements on an ongoing basis. This may, for example, include anonymising or changing the name, addresses and other personal or sensitive information in case files and other resources.

Any information taken from real cases/files is intended for use only in the answering the topic questions.

5. Copying and Plagiarism:

Plagiarism is copying the words or ideas of others and passing it off as your own, and is a most serious academic offence.

All sources that you use must be referenced within your text and in your bibliography.

The case study submissions will be checked for plagiarism.

It does not matter whether you use direct quotations or paraphrase the words of an author, you must reference your source.

Failure to do so may result in a zero mark or other disciplinary action under ATU Sligo procedures,

The School of Business uses the Harvard Referencing system.

6. FAQ's

When do the case studies have to be submitted by?

They must be submitted by the date specified by the programme manager in ATU Sligo and before the end date of semester. You will be told in advance of the deadline dates for each module.

How many case studies must be submitted?

Four or five from up to nine offered for use (see the specific instructions for each module).

What if my first attempt at a case study does not effectively answer the questions posed?

Three attempts are allowed for each study, so apprentices can review what they have done and resubmit to their supervisor. Only the final signed off version should be uploaded to Moodle.

Are these case studies marked or how are they marked?

The case studies are not individually marked in percentage terms. They are simply verified as completed by way of the questions being answered with a pass or fail using the guidance notes for each question and the points in section 3.2 above.

Can I obtain the credits for this module if I don't complete the studies?

No, it is not possible to obtain the ECT credits for this module unless the five case studies have been completed and uploaded to ATU Sligo Moodle.

Are the set word counts important? Do I need to stick to the word count?

Yes, they are relevant. Part of the process is to learn how to use business English but also to be efficient in the use of language.

Who verifies that the case studies have been done?

Your supervisor will verify that you have completed the case studies and then sign/date your submission. This completed document is then uploaded by you, the apprentice, through your portal on ATU Sligo Moodle.

What happens if the organisation I work in cannot facilitate me obtaining access to relevant files or cases that allow me to answer specific case study questions?

You should notify your supervisor of the difficulty. In exceptional cases, contact can then be made with ATU Sligo and a sample case study provided. The purpose of this module is as far as possible to get the apprentice to engage with business files and data and work with this from within their own work environment.

If you have any queries about the case studies please email apprenticeships@iii.ie

Appendix 1:

Case Study Marking Form



The
Insurance
Institute



DEVELOPING
YOUR FUTURE
IN FINANCE

CASE STUDY MARKING FORM

Case Study No.

Topic No.

Topic Title

Insurance Module

Learning Outcome:

To be completed by the Apprentice:

I confirm that all the work on the case study is my own work.

Signed ----- (Apprentice) Date -----

Apprentice Student Number _____

To be completed by the Supervisor:

Checklist (please circle pass or fail as appropriate):

Attempt 1	Attempt 2	Attempt 3
Pass/Fail	Pass/Fail	Pass/Fail

PRINT Name: _____ (Supervisor)

Signed ----- (Supervisor) Date -----