Insurance Council
BRITISH COLUMBIA

PROGRAM GUIDELINE:

Continuing Education Accreditation for Course Providers

DRAFT FOR CONSULTATION

1. Purpose

This program guideline outlines foundational components and processes for the Insurance Council of BC's ("Insurance Council") accreditation of continuing education course providers. Accreditation requests for course providers will be assessed based on the criteria outlined in this document.

Accredited course providers are also required comply with the *Continuing Education Accreditation for Individual Courses* program guidelines.

2. Definition of Continuing Education

Continuing Education ("CE") is learning that helps fulfill the knowledge required to maintain a standard of professional competence and remain current in an ever-changing industry. Under Council Rule 7(5), insurance licensees must meet the requirements of the Insurance Council's continuing education program. Continuing education must take place in a structure dedicated to learning, such as a classroom, office setting, or online.

3. Accredited Course Providers ("ACP")

Accredited Course Provider status allows the organization to provide continuing education on an ongoing basis by self-accrediting their courses in accordance with the Insurance Council of BC's current continuing education course content guidelines. Certain criteria must be met to achieve and maintain ACP status. In addition to ACP status, course providers may also opt to upload course information to the Insurance Council's Online Accreditation website. Accredited Course Providers and any uploaded courses offered by the Accredited Course Provider will be displayed on the Insurance Council's website.

4. Eligibility to Become an Accredited Course Provider

Organizations seeking Accredited Course Provider status must consistently promote broker competency and best practices through high-quality, industry-relevant courses and pay the required fee(s).

Additionally, course provider applicants would need to meet the following criteria:

- Offer a minimum of 5 insurance industry courses at any given time that meet the course content requirements outlined in the Insurance Council's CE Guidelines or offer insurance designation programs or courses which lead to a recognized insurance designation;

- Provide access to a current offered course for review as part of the application package; and
- Complete mandatory training for Accredited Course Providers within 30 days of Accredited Course Provider application approval.

The Insurance Council will consider requests for accredited course provider status from insurers, agencies, and organizations that offer continuing education courses to BC licensed insurance agents, adjusters and salespersons, provided they meet the above criteria.

5. Assigning CE Credit Hours

a. One hour of instruction is equal to 1 CE credit. Each 15-minute increment of course instruction is equal to 0.25 CE credit.

b. A course that exceeds 15 hours may require additional information in the application process.

6. Course Content

Course content must meet the Insurance Council's requirements. Continuing education program requirements are outlined in the Continuing Education Guidelines for each licence class. Review these guidelines to ensure your course meets the Insurance Council's course content guidelines.

a. For **salespersons, level 2 agents, adjusters and travel agents**, qualifying insurance continuing education includes technical material directly related to:

- General insurance products;
- Compliance with insurance legislation and licensee requirements such as the Council Rules, Insurance Council Code of Conduct, the *Financial Institutions Act* and privacy legislation;
- Ethics; or
- Errors and omissions insurance.

b. For **level 3 agents**, "technical material" is broadened to include courses relating to management, accounting and human resources.

c. For **life and/or accident and sickness insurance agents**, qualifying continuing education includes technical material directly related to:

- Life and/or accident and sickness insurance products;

- Financial planning; provided the education is geared to life insurance and not a non-insurance sector, such as securities or mutual funds;
- Compliance with insurance legislation and requirements such as the Council Rules, Insurance Council Code of Conduct, the *Financial Institutions Act*, privacy legislation and anti-terrorism/money laundering legislation;
- Ethics, or;
- Errors and omissions insurance.

d. Course content not accepted:

- Marketing or sales techniques;
- Service;
- Training on how to use computer programs;
- Self improvement or self help; and
- Non-insurance products.

7. Application Process

Upon reviewing the program guidelines for *Continuing Education Course Provider Accreditation* and *Continuing Education Accreditation for Individual Courses*:

- Complete the relevant Course Provider Accreditation Request via the Insurance Council's Online Accreditation website.
- Ensure the Accreditation Request information is completed in full and submit the request application through the Online Accreditation website.
- Once the application has been received, the processing time varies depending on the completeness of application. If there are any materials missing from the application, the processing time may increase.
- The Accreditation Committee will communicate application status to the Course Provider.
- If a course provider is denied accreditation, the Accreditation Committee will communicate to the applicant and note the discrepancies.

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8. Audit Process

The Insurance Council reserves the right to monitor, review or audit the content and delivery of course material at any time.

a. **Revocation:** ACPs who fail to comply with the Insurance Council's CE requirements, fail to comply with the accreditation program guidelines, or become unresponsive to inquiries from the Insurance Council, will have their ACP status revoked and will no longer be allowed to present themselves as an Accredited Course Provider in British Columbia. Course providers whose ACP status has been revoked may submit courses as per the accreditation process for individual courses (outlined in the *Continuing Education Accreditation for Individual Courses* program guidelines) until such time as their ACP status is reinstated. Reinstatement requests will be assessed on a case-by-case basis.

b. **Removal:** ACPs who request their status to be inactivated, or who do not renew their Accredited Course Provider status at the time of expiration will be removed as an ACP in British Columbia.

9. Appeals and Resubmissions

Course provider accreditation is subject to a three (3) year validation period from the date of approval. Upon expiration, re-application for ACP accreditation will be required. ACPs who fail to re-apply will face *removal* (see 7b). Course providers who have been denied ACP status will receive written communication noting the deficiencies. It is the responsibility of the course provider to ensure the continuing education accreditation program guidelines are met and deficiencies rectified prior to re-application.

a. **Re-application:** ACPs are required to follow the same process for re-application which involves applying for ACP status and paying applicable fees.

b. **Appeals:** Appeals must be submitted by email correspondence to accreditation@insurancecouncilofbc.com. Appeals will only be reviewed if received within 30 days of the initial committee review.

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