



Ollscoil
Teicneolaíochta
an Atlantaigh

Atlantic
Technological
University

BA (Hons) in Insurance Practice Insurance

Work Based Learning - Tasks

First Year – Semesters 1-3

September 2025



The
**Insurance
Institute**



Work-based learning encompasses a wide array of learning experiences and in order to assess this learning we have developed a range of assessment tools to avoid overreliance on any single instrument. The work-based tasks enable the apprentice to demonstrate their application of 'off the job' learning and support lifelong learning.

There are a range of tasks, which form part of the assessment of the insurance modules in Year 1 and Year 2. Every opportunity has been taken to give the apprentice a choice of tasks in their chosen stream, either Life or Non-Life and an additional list of Generic tasks where possible. Each module has a mandatory number of tasks to be completed and that number can differ per module/per semester.

PLEASE READ THE REQUIREMENTS CAREFULLY

1. Completing the Tasks

The apprentice **must complete all mandatory tasks** and the required number of elective tasks each semester. A task completion report form must be completed for each task and submitted to your supervisor to be verified and signed.

The expected word count for each task is 500-1000 words.

2. The role of the supervisor

The apprentice will complete the tasks and submit a task completion report form to their nominated supervisor to verify that it has been completed. The supervisor does not grade the completed task. A task completion report form is attached in **Appendix 1**.

The role of the supervisor is to:

- Assist the apprentice to locate industry and employer resources if required.
- Verify that the task has been completed by the apprentice (complete or not complete basis)

3. Deadlines for submitting task completion report forms:

Task: Semester 1 Submission deadlines:	
1	3 Oct 2025
2	10 Oct 2025
3	17 Oct 2025
4	31 Oct 2025
5	14 Nov 2025

Task: Semester 2 Submission deadlines:	
1	30 Jan 2026
2	06 Mar 2026
3	10 Apr 2026

Task: Semester 3 Submission deadlines:	
1	03 Jul 2026
2	31 July 2026
3	14 Aug 2026

Remember: these are the final deadlines for uploading the signed task completion report forms to Moodle.

Apprentices and supervisors should agree an appropriate schedule for discussing, completing, and signing the report forms to ensure that these deadlines are met.

4. Forward planning

Issuing the tasks in advance allows plenty of time for the apprentices and supervisors to meet the submission deadlines. It also gives adequate notice of any documents and/or resources that need to be sourced for or by the apprentices.

5. 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 any case files and other resources.

Semester 1 - Work Based Learning Tasks

Semester 1 (September – December):

4 Mandatory tasks and 1 Elective

End of semester reflective diary

Purpose of Work based Learning Tasks:

The purpose of the first set of work-based tasks is primarily to provide you with the opportunity to familiar yourself with your employer and the insurance profession. To encourage and support you to plan your workload, leisure, and study time over the coming months to enable you to succeed in the apprenticeship.

This assignment will help you practice the following skills:

- Professional Communication – engaging with your supervisor and colleagues/peers.
- Work-based Collaboration – reaching out to colleagues and peers to complete work and develop networks.
- Research – finding and presenting information professionally and in line with your employer's expectations.
- Planning – a key skill for any professional is time-management and scheduling.

This assignment will help you gain the following knowledge:

- Specialised knowledge – you will develop a key understanding of your employer and the market they work in.
- Practical understanding of facts, concepts, rules, regulations, and how they are applied in your area of insurance.

Semester 1 Modules:

- The Nature of Insurance or QFA Life Insurance
- Professional Business Communication
- Teamwork and Workplace Collaboration

Completing the Tasks:

For the Nature of Insurance (CIP01) and QFA Life Assurance practice modules in Semester 1 there are **4 mandatory tasks and 1 elective task from a choice of 2**. The tasks provide opportunities to develop a greater understanding of your company, the insurance industry as a whole and to prepare you for your apprenticeship. They are practical in nature, and you are expected to research within your organisation and relevant websites where appropriate (with guidance from supervisors).

The following is a list of the tasks for ALL apprentices (Life and Non-Life):

Task	Status	Title	Description
1	Mandatory	<p>Workplace Knowledge</p> <p>For this task you need to find out as much as you can about where you work. There are lots of ways to do this: e.g., your firm's website, marketing material, annual reports, organisational charts and employee information. Your supervisor will help you find what you need.</p> <p>Every organisation will have their own way of doing things but if in doubt ask!</p>	<ol style="list-style-type: none"> <u>1.</u> What is the full name of your firm? Is the legal name the same as the trading name/s? If not, state the trading name/s. <u>2.</u> Is the firm Irish-owned, or part of an international organisation? <u>3.</u> Describe what your firm does, and the main types of customers that it serves. (about 50/100 words) <u>4.</u> How many people are employed by the firm? <u>5.</u> Are all the employees based in the same place? (e.g., is there more than one office? Do some people work from home or at other locations?) <u>6.</u> Who is the CEO or the most senior person in your firm? <u>7.</u> Briefly explain the role of your department/section and how it interacts with other parts of the business. (about 50/100 words). <u>8.</u> Does the firm have a staff handbook? If not, discuss the following questions with your supervisor: <ul style="list-style-type: none"> ➤ What is the dress code in your organisation? ➤ Punctuality policy ➤ Internet usage policy ➤ Personal phone usage policy ➤ Business Communications – phone/email – is there templates/policies and procedures to follow? ➤ Remote working policy <p><i>Most of these questions require very short answers.</i></p> <p><u>Guidance notes</u></p> <p><i>Make sure that you use full sentences, with an acceptable standard of grammar and spelling.</i></p> <p><i>When answering questions, DO NOT copy and paste from websites or other sources. You must present and explain the information in your own words.</i></p>

2	Mandatory	<p>Personal Study/Time Management Plan</p> <p>https://instituteofeducation.ie/free-study-resources/study-skills-resources/</p> <p>Examples of study plans are available on Moodle.</p>	<p>Create a personal study/time management plan for the academic year that incorporates busy periods at work, holidays and holiday cover, deadlines, issues, challenges and priorities.</p> <p>As part of this exercise, you are required to arrange a time to sit down with your supervisor to:</p> <ul style="list-style-type: none"> • Share the submission calendar/schedule with your supervisor. This has been emailed to you and is available on Moodle. • Agree with your supervisor how far ahead of the submission dates do they wish to receive your work to review and sign-off. • Discuss their role as your supervisor & share with you, key dates in their, and the business' calendar; to ensure you meet all submission deadlines. <p>Ensure you share the semester calendar (work-based learning (WBL) submission dates) and <u>agree a plan with your supervisor for submitting them sign-off so that they can be uploaded by the deadline dates</u> provided. Ensure you include downtime, key holidays, etc. in the plan. Some modules and topics may require more effort than others. Update your plan as you become more familiar with your workload and the time required to complete the work.</p>
3	Mandatory	Acronyms	<p>List 10 terms/acronyms with their meanings, which you have come across in your organisation or industry, which you were not familiar with when you started.</p>
4	Mandatory	Competitors	<p>Identify three competitors of the business – review their websites and outline their main USPs in your opinion.</p> <p>Which competitor has the most impressive website in your opinion and why?</p>
5	Elective	<p>Student Wellbeing and looking after yourself.</p> <p>If you do not wish to use the ATU toolkit. Below is a link to a range of apps that are available to students.</p>	<p>Being Well, Living Well is an interactive, online tool kit available to all students in ATU Sligo. The toolkit takes a positive, preventative approach to help you to maintain your mental, physical, emotional, and financial wellbeing. The toolkit is available by clicking here (you will need to log into Moodle to access): Being Well, Living Well</p>

		https://host-students.com/wellbeing-apps-for-students/	Write a short summary explaining the tool kit to your supervisor, listing the various units that the toolkit covers and the benefits that it can have to you as a first-year apprentice.
6	Elective	Find an Apprentice Buddy	<p>At induction, you were encouraged to set up a WhatsApp Group.</p> <p>Reach out to one apprentice that you met (not working in your organisation) and organise a quick chat on Teams or any online platform.</p> <p>Take a screenshot and find 3 things you have in common!</p> <p>Provide a screen grab or selfie with a few lines on what you have in common.</p> <p><u>Apprentices that find buddies/peers build their network really benefit from the shared support.</u></p>

Semester 2 - Work Based Learning Tasks

Semester 2 (January to May):

3 Monthly tasks

End of semester reflective diary

Semester 2 Modules:

- Compliance and Advice or QFA Regulation
- Technical Communications
- Customer Service

Purpose of Work based Learning Tasks:

The purpose of the second set of work-based tasks is to introduce you to the advocacy bodies and other areas that are associated with the insurance industry and provide you with an opportunity to familiarise yourself with their role and responsibilities.

This assignment will help you practice the following skills:

- Research – a key skill that you will require throughout your learning and career journey is the ability to research, summarise and present key facts.
- Exercise initiative - these tasks require you to work independently to source knowledge and evaluate what you read and hear.

This assignment will help you gain the following knowledge:

- Evaluate and maintain professional knowledge - the tasks outlined below introduce you to organisations and bodies that will form the foundation of your career going forward.
- Broad and up-to-date specialised knowledge – these tasks will ensure you have up-to-date knowledge in a variety of areas comprising the professional discipline of insurance.

Completing the Tasks:

For the Compliance and Advice (CIP02) and QFA Regulation practice modules in Semester 2 there are **3 tasks to be completed**; 2 are MANDATORY and an additional 1 can be chosen from ANY OF THE SECTIONS (Generic, Non-Life or Life) below.

Task	Status	Title	Description
1	Mandatory	GDPR	What constitutes a data breach? Who do you inform if a data breach occurs? How do you report it?
2	Mandatory	Advocacy Bodies & Consumer Vulnerability and Trust. https://shorturl.at/NPNKi	List all the advocacy bodies for consumers that cover finance, pensions and insurance in Ireland and give a brief description of each? Write a short report to explain: <ul style="list-style-type: none">• Why is consumer vulnerability and trust important?• How can you build consumer trust?• Write a short summary of your thoughts.

Please select one of the following tasks to complete:			
3	Elective (Generic)	Consumer Insurance Contracts Act 2019 https://revisedacts.lawreform.ie/eli/2019/act/53/front/revised/en/html	What is CICA? When did it come into law? Write a summary of what the legislation means for insurers.
4	Elective (Generic)	Cyber Security	67% of Irish companies faced at least one cyber-attack in the past 12 months—a slight dip from the 2023 stat of “over 70%”. Irish firms experienced an average of 58 attacks per year (more than one per week), confirming that Ireland remains amongst the most-targeted businesses globally. Source and list at least 3 websites you would use to inform yourself about Cybersecurity in both a personal and business context.
5	Elective (Generic)	Central Bank	Visit the link https://www.centralbank.ie/publication and choose a research piece that would be relevant to your business. Summarise the key points and write a short report for your supervisor.
6	Elective (Non-Life)	Passporting	What is passporting and why does it matter?
7	Elective (Life)	Financial Services & Pensions Ombudsman	Discuss the role of the Financial Services & Pensions Ombudsman in the event of a complaint?
8	Elective (Life)	Financial Services & Pensions Ombudsman	Visit https://www.fspo.ie/ , review the website and report on the 3 most useful/interesting resources available.

Semester 3 - Work Based Learning Tasks

Semester 3 (June to August):

3 Monthly tasks

End of semester reflective diary

Semester 3 Modules:

- Personal General Insurance
- QFA Loans

Purpose of Work based Learning Tasks:

The purpose of the third set of work-based tasks is to introduce you to some key trends in insurance such as InsurTech and ESG. The tasks will also ask you to consider how consumers feel about insurance products and the role of price comparison sites.

This assignment will help you practice the following skills:

- Professional Communication – engage with customers to ascertain their insurance needs.
- Demonstrate the ability to assess the housing, consumer credit and associated insurances needs of consumers.
- Excel – you will develop a working knowledge of excel.

This assignment will help you gain the following knowledge:

- Specialised knowledge – you will understand the growing importance of InsurTech and ESG to the sector.
- Practical understanding of facts, concepts, rules, regulations, and how they are applied in your area of insurance.

Completing the Tasks:

For the Personal General Insurance (CIP03) and QFA Loans practice modules in Semester 3 there are **3 tasks to be completed**; 2 are mandatory and an additional 1 can be chosen from ANY OF THE SECTIONS (Generic, Life and Non-Life).

Task	Status	Title	Description
1	Mandatory	Climate Risk	<p>The European Insurance and Occupational Pensions Authority (EIOPA) reports directly to the European Commission, the European Parliament and the European Council. They influence climate-related insurance regulation.</p> <p>Insurers play a vital role in tackling climate change by managing and pricing climate-related risks, promoting resilience through risk mitigation incentives, and steering capital toward sustainable investments. While they face</p>

			<p>challenges such as rising claims from extreme weather and regulatory pressures, insurers also have opportunities to innovate with green insurance products and support the transition to a low-carbon economy.</p> <p>https://www.eiopa.europa.eu/publications/role-insurers-tackling-climate-change-challenges-and-opportunities_en</p> <p>Share your thoughts on EIOPA's report with your supervisor at an agreed meeting either in person or online and summarise your thoughts.</p>
Task	Status	Title	Description
2	Mandatory	<p>Excel</p> <p>https://www.youtube.com/watch?v=LgXzzu68j7M</p> <p>15 minutes</p>	<p>The use of excel is crucial in business and as an insurance apprentice for future modules.</p> <p>This task introduces you to excel or helps you improve your current knowledge. Watch the excel video available on the YouTube link provided or visit Microsoft website and detail 3 new functions, formulae, formatting tools or function that you learned about and will find useful at work.</p>
Please select one of the following tasks to complete:			
3	Elective (Generic)	Grudge Purchase	<p>Insurance is often viewed as a grudge purchase – define what is meant by this term and why this view might be taken.</p> <p>Discuss how you might combat the concept of a grudge purchase.</p>
4	Elective (Generic)	Brand Loyalty	<p>Name a brand or service that you especially like. It can be anything e.g., Apple, Nike, Harvey Norman, Airbnb, Kerrygold etc.</p> <p>Think about why you choose to be loyal to this brand/service provider and how this is applicable to the insurance industry. Write a short report 100 words and summarise your thoughts.</p>
5	Elective (Generic)	<p>ESG</p> <p>https://www.youtube.com/watch?v=m3EGihH4d54</p> <p>https://kpmg.com/xx/en/home/insights/2022/05/esg-in-insurance.html#:~:text=Environmental%2C%20Social%20and%20Governance%20(ESG)</p>	<p>The Central Bank (CBI) are increasingly embedding ESG into their supervisory assessments and engaging with regulated firms to ensure that they themselves are aware of their exposures and that they are incorporating climate-related risks into prudent risk management and investment practices.</p> <p>Review the video provided regarding ESG and an overview from KPMG. Does your organisation have an ESG policy? If so, please provide an overview of</p>

			the key points.
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Appendix 1

Task Completion Report Form

TASK COMPLETION REPORT FORM

Task No. Task Title

PLEASE CLEARLY HIGHLIGHT WHICH TASK YOU HAVE COMPLETED

Note: Expected word count is 500-1000 words.

Checklist to be completed by your supervisor:

Task Complete – (please tick as appropriate)	Yes	No

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

PRINT Name: _____

All the work on this task is my own work:

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

Student/Apprentice Number _____

Once your supervisor has confirmed that you have completed the task, scan and upload this form and any supporting documents to Moodle.

Please note that only forms with a scanned original signature are acceptable. Alternatively you can upload an email from your supervisor stating that you have completed the relevant task listing the task title.