Benchmarking Talent for a Sustainable Future

# HKIB Briefing to New Trainer

The Hong Kong Institute of Bankers
香港銀行學會

Last updated: 31 December 2024

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# Today's Agenda

- Welcome & Introduction
- HKIB Background
- Introduction of HKIB Professional Banking Qualification
- Introduction of Qualifications Framework (QF)
- Programme Development Process Overview
- General Guidelines for Trainers
- Reference Documents
- Support from HKIB
- Relevant Training Subsidies from HKSAR
- Q&A

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# Introduction to the HKIB

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# The Hong Kong Institute of Bankers 香港銀行學會

- Founded in 1963, the **first not-for-profit institution** that provides training and certification services to the banking community in Hong Kong

- The first professional body to **offer banking qualifications at QF Level 6,** equivalent to a Master's degree level in Hong Kong

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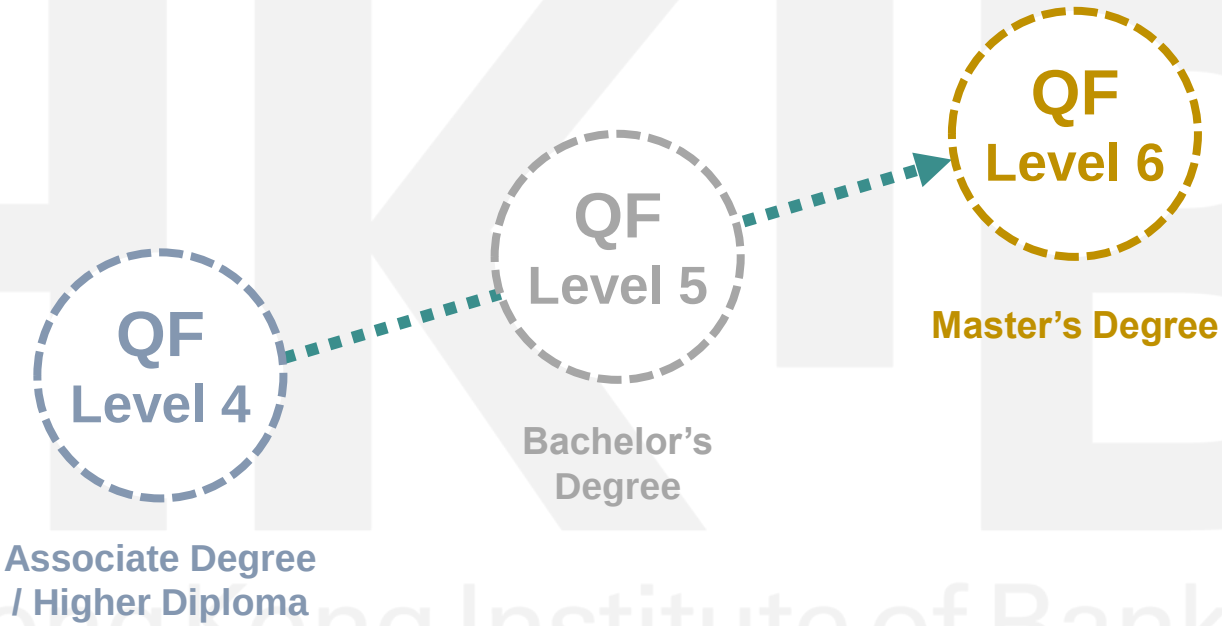
# Professional Qualifications Assessment Agency (PQAA)

- We are the first professional body appointed as **PQAA** to **offer QF-recognised Professional Qualifications (PQ) (24 PQs) for banking industry** at the QF level 6, which is equivalent to that of a Master's degree in Hong Kong

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# Strong linkage with banking practitioners

**~100**
Corporate Members /
Corporate Affiliates

**15,000+**
Individual Members

**40+**
International
Collaborative
Partners

A **key stakeholder** in
the banking industry

**31**
Banking
Professional
Qualifications

**6,000+**
Exam &
Grandfathering Enrolments

Organised **70** events and key industry conferences in 2023 incl.
**Annual Banking Conference &**
**Cybersecurity Solutions Day**

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# A Strong Community of Banking Professionals

## Cross-region Talent Mobility

## Regulatory Support

香港特別行政區政府
新聞公報

GovHK 香港政府一站通　簡体版　English

香港金融管理局與澳門金融管理局合作於澳門推行銀行專業資歷架構（附圖）

下稿代香港金融管理局發出：

香港金融管理局（香港金管局）與澳門金融管理局（澳門金管局）十月二十六日簽署合作備忘錄，共同推行銀行專業資歷架構的專業培訓及資格互認，以加強兩地的銀行業人才發展及流通。

銀行專業資歷架構為業界提供共用的專業能力標準，是香港金管局與香港銀行業界、香港銀行學會及其他相關專業團體合作的成果。根據合作備忘錄，香港金管局與澳門金管局已經委託香港銀行學會及澳門金融學會合作執行相關的專業培訓和資格互認，同時為於兩地流動的銀行從業員分別提供香港和澳門的相關法規銜接課程。

香港金管局副總裁阮國恒表示：「香港金管局與澳門金管局攜手，一同於澳門推行銀行專業資歷架構，是一個重要的里程碑，標誌着我們在推廣銀行業的人才發展及協助人才於兩地流通的新階段。雖然銀行專業資歷架構並非一項發牌制度，我們希望藉此鼓勵從業員提升專業能力和操守，同時亦可以加強他們對相關運作範疇風險的了解。我有信心，我們的合作會為香港及澳門的銀行業擴大人才庫，從而支持業界的發展。」

澳門金管局行政管理委員會委員黃善文表示：「澳門金管局與香港金管局簽署關於引入銀行專業資歷架構的合作備忘錄，將有助加強本地金融從業人員的專業能力培訓。我們相信，隨着合作備忘錄的簽署，將有助澳門銀行從業人員水平的提升，實現兩地人才區域認證，為本澳居民提供更專業的服務，並有助提升澳門在金融服務領域上的國際地位。」

完

2018年10月30日（星期二）
香港時間16時50分

HONG KONG MONETARY AUTHORITY
香港金融管理局

Supervisory Policy Manual

| CG-6 | Competence and Ethical Behaviour | V.4 – 23.5.2024 |
|---|---|---|

This module should be read in conjunction with the Introduction and with the Glossary, which contains an explanation of abbreviations and other terms used in this Manual.

Purpose

Classification

Previous guidance

Application

Structure

澳門金融管理局訊：

**內地證券業從業人員資格考試落戶深合區**

為配合金融業發展對專業人才的需求，經澳門金融管理局爭取，中國內地的“證券行業專業人員水平評價統一測試”已於橫琴粵澳深度合作區（深合區）設立考點，首場考試將於今年6月3日至4日舉行，即日（5月8日）起至5月12日接受報名，有意投考人士可透過中國證券業協會網站報名。

**內地證券資格考試設點深合區為澳門考生提供便利**

按中國證券監督管理委員會的證券業從業人員資格管理辦法，從業人員必須先通過“證券行業專業人員水平評價統一測試”，並透過內地的聘用機構註冊從業資格後，方可從事相關證券業務。中國證監會並指定中國證券業協會負責組織這項資格考試。

相關專業資格在深合區的落地，將為澳門考生提供便利，為澳門金融人員於深合區從事金融業務創設條件，有助提升金融從業員的專業水平，促進澳門及深合區現代金融業的聯動發展。

**持續引入專業資格考試提升居民競爭力**

澳門金管局透過澳門金融學會，陸續引入國際及國家認可的金融專業資格考試，除是次引入的“證券行業專業人員水平評價統一測試”外，還包括香港的“銀行專業會士”及“證券及期貨從業員資格考試”、“認可財務策劃師”、“認證財務顧問師”、“深港澳金融科技師”專才計劃等金融專業資格考試，便利居民透過考取專業資格，提高專業水平及競爭力。

澳門金管局將透過澳門金融學會，結合專業培訓機構和高等院校資源，陸續開辦相關專業資格考試的備考課程，協助澳門居民考取相關專業資格。

2023年5月8日

## Industrial Exchange

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# HKIB – Milestone Achievement

**1963** – The Chartered Institute of Bankers – Hong Kong Centre

**1990** – Development of local syllabuses at Associateship Examinations level

**1995** – Inauguration of the HKIB

**2005** – Opening of Beijing Representative Office

**2013** – The first and only non-tertiary institution with programme accredited at L6 under HKQF

資歷架構 Qualifications Framework Level 6

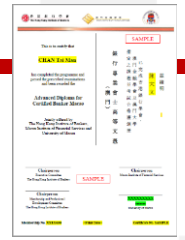
**2017** – Launch of flagship programme – Certified Banker

**2019** – Digitalisation of HKIB Membership Services

**2020** – Launch of Online Learning Platform

**2020** – Appointment as Professional Qualifications Assessment Agency by Education Bureau

**2021** – Collaboration in PQPs in Macao with MIFS and UM



**2023** – 60th Anniversary of HKIB

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# Introduction of HKIB Professional Banking Qualifications

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# HKIB Banking PQ Overview

## HKIB Professional Qualification Programmes (PQP)

### Certified Banker Programme

"Holistic Banking Professional"

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Integration

### ECF Programmes

"Role-based Specialist"

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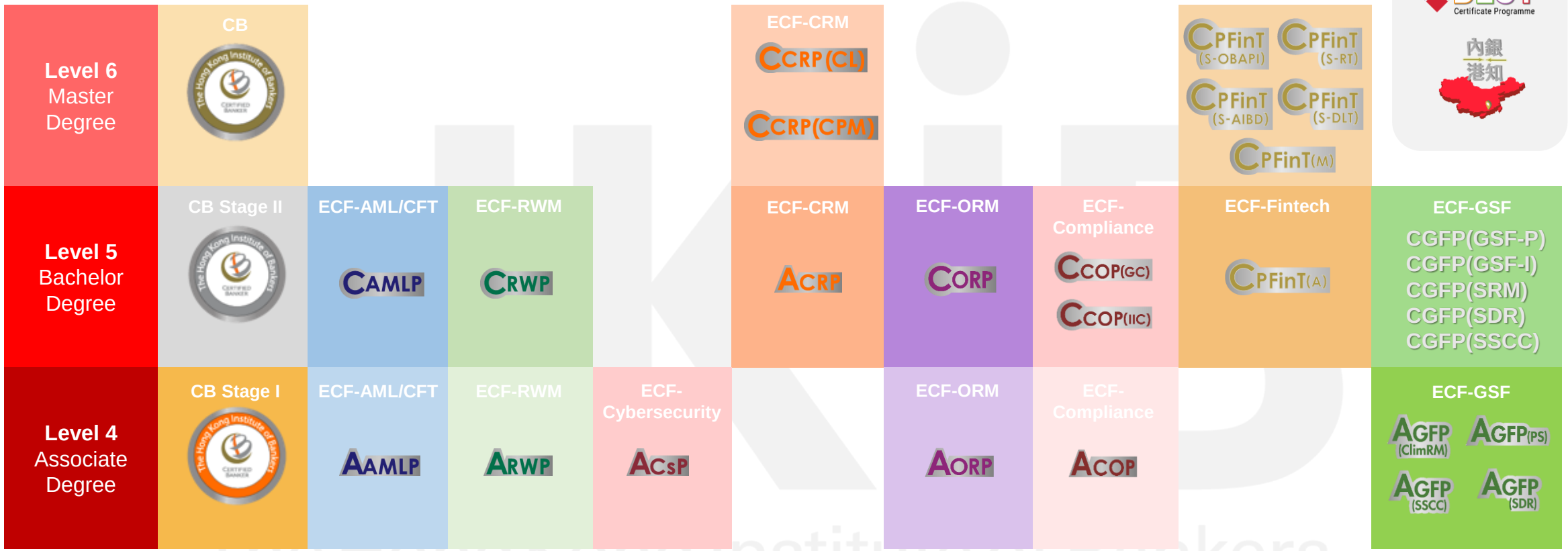
# Types of Professional Qualifications

資歷架構 Qualifications Framework




Continuing Development Programme

BEST Certificate Programme

內銀港知

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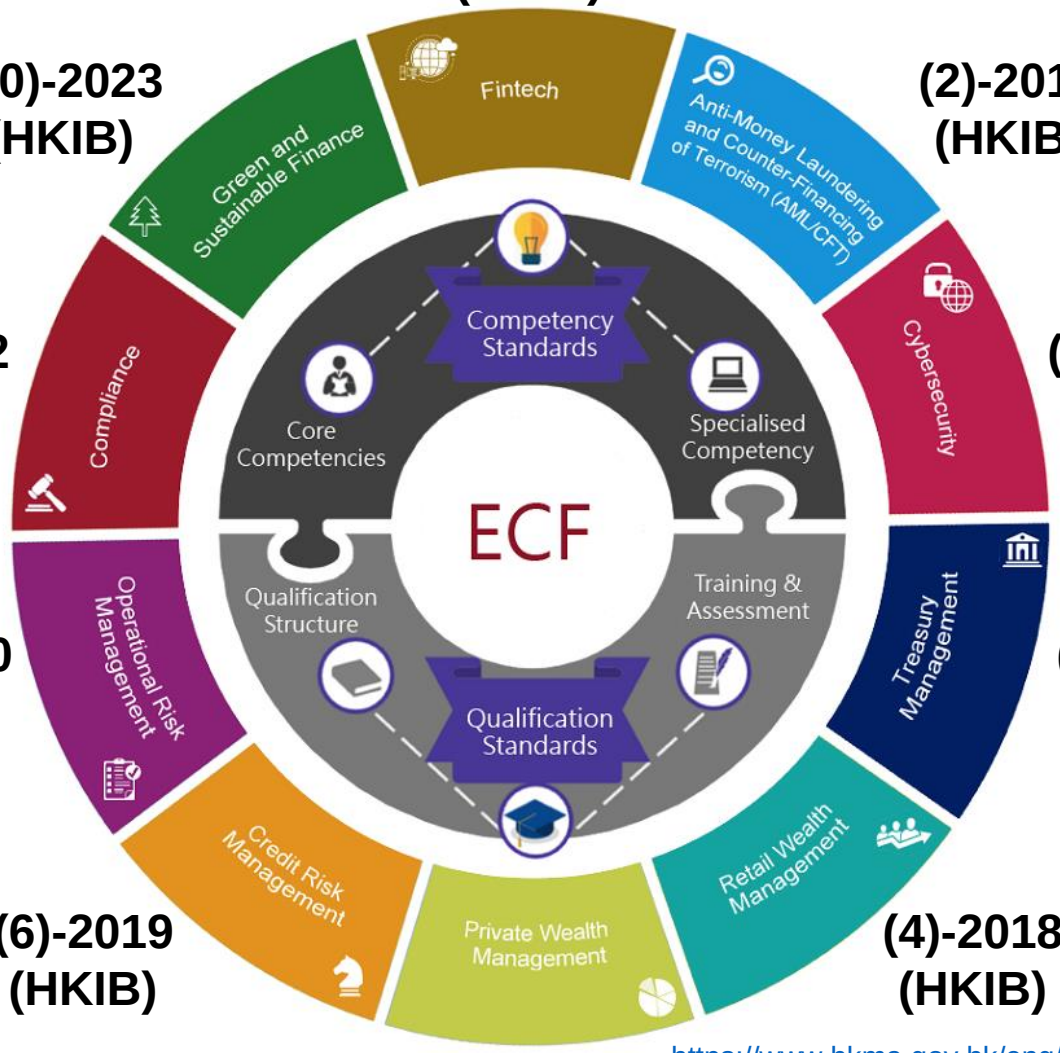
# ECF Development Overview




https://www.hkma.gov.hk/eng/key-functions/international-financial-centre/soft-infrastructure/enhanced-competency-framework/

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# Definition: Award and Qualification

## Common Programme Terminology

| Terminology | Description |
|---|---|
| **Award** | - Each learning programme should carry an award as a formal recognition of the achievement of the learning programme. The award accurately reflects the student's achievement of the intended learning outcomes of the programme.<br>e.g. Professional Certificate for ECF on Retail Wealth Management (RWM) |
| **Qualification** | - Candidates who have completed the programme and fulfilled the requirement on work experience will be elected to use the respective qualification **(i.e. awarding a scroll**). Qualification holders are then entitled to print the qualification on their business card and curriculum vitae which signifies their professional excellence. The qualification status would be maintained by fulfilling the CPD requirements annually.<br>e.g. Certified Retail Wealth Professional (CRWP) |

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# 20 QF-recognised Professional Qualifications

**Certified Banker**

Non-QF Recognised

**Enhanced Competency Framework by the HKMA**

CAMLP AAMLP CRWP ARWP ACsP CORP AORP

CCRP(CPM) CCRP(CL) ACRP CCOP(GC) CCOP(IIC) ACOP

CPFinT(A) CPFinT(M) CPFinT (S-AIBD) CPFinT (S-DLT) CPFinT (S-OBAPI) CPFinT (S-RT)

AGFP(PS) AGFP (ClimRM) AGFP (SDR) AGFP (SSCC)

CGFP(GSF-P) CGFP(GSF-I) CGFP(SRM)
CGFP(SDR) CGFP(SSCC)

To be accredited in 2025


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# Introduction of Qualifications Framework (QF)

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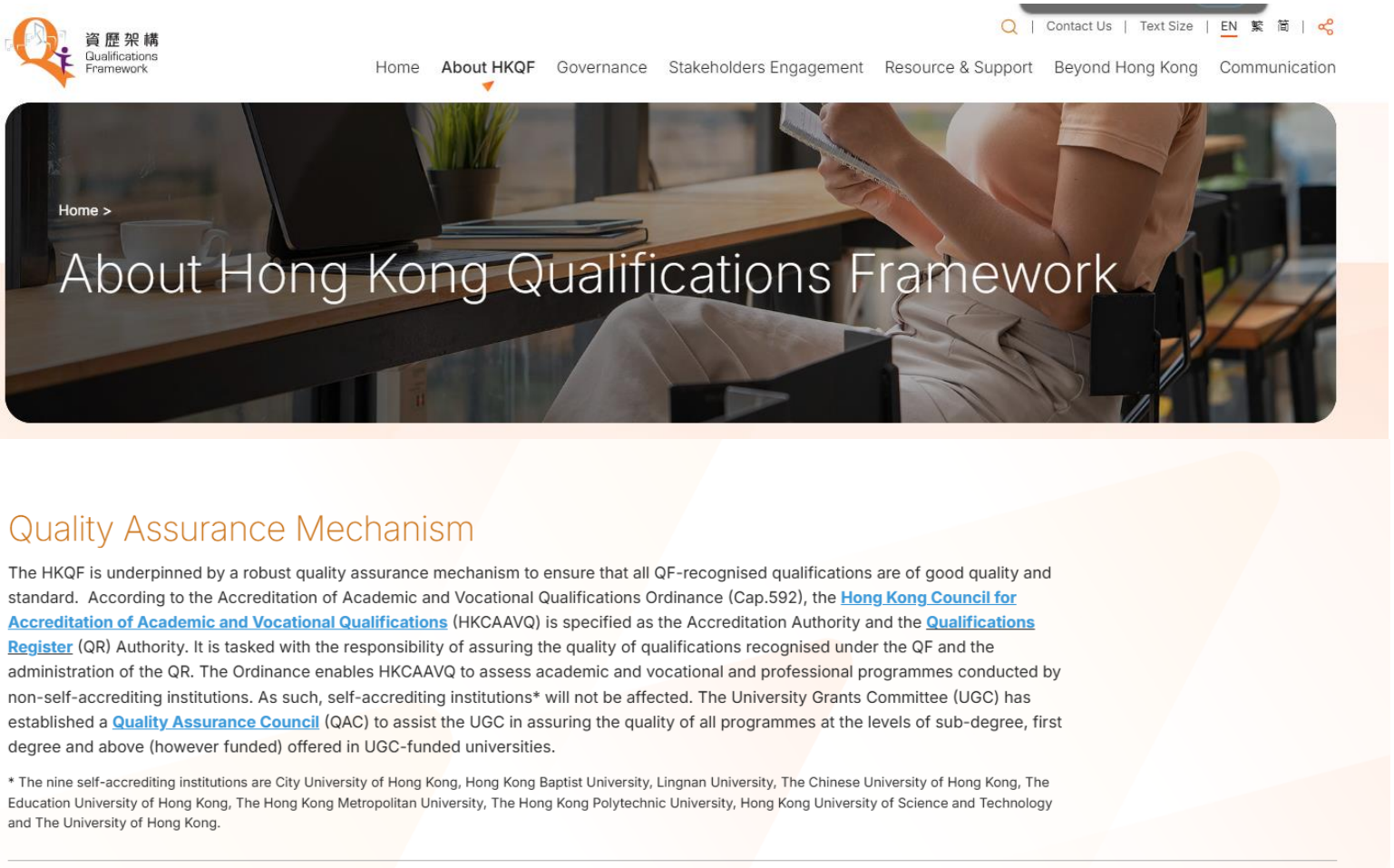
# Qualifications Framework (QF)

- The HKSAR Government has officially launched the Qualifications Framework (QF) as a Quality Assurance (QA) System in 2008.




https://www.hkqf.gov.hk/en/about-hkqf

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# Industries with QF

## Industry Training Advisory Committee (ITAC)

As of now, ITACs/CITAC have been established in the following 23 industries.

- Arboriculture & Horticulture >
- Automotive >
- Banking >
- Beauty & Hairdressing >
- Catering >
- Elderly Care Service >
- Electrical & Mechanical Services >
- Fashion >
- Human Resource Management >
- Import & Export >
- Information & Communications Technology >
- Insurance >
- Jewellery >
- Logistics >
- Manufacturing Technology (Tooling, Metals & Plastics) >
- Printing & Publishing >
- Property Management >
- Retail >
- Security Services >
- Testing, Inspection & Certification >
- Travel >
- Watch & Clock >

https://www.hkqf.gov.hk/en/stakeholders-engagement


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# Introduction of QF

## Common QF Terminology

### What is QF?

To clearly define the standards of different qualifications, ensure their quality and indicate the articulation ladders between different qualifications

### Why QF?

Set clear goals and directions for continuous learning

Enhance the overall quality and competitiveness of the local workforce

### What is SCS?

It stands for Specification of Competency Standards (SCSs) which sets out the skills, knowledge and competency standards required of the practitioners to perform various job functions in industries effectively.

### What is VQP?

Vocational Qualifications Pathway (VQP) of relationship manager / product specialist, which charted to facilitate learners in drawing up their career development plans in retail wealth management.

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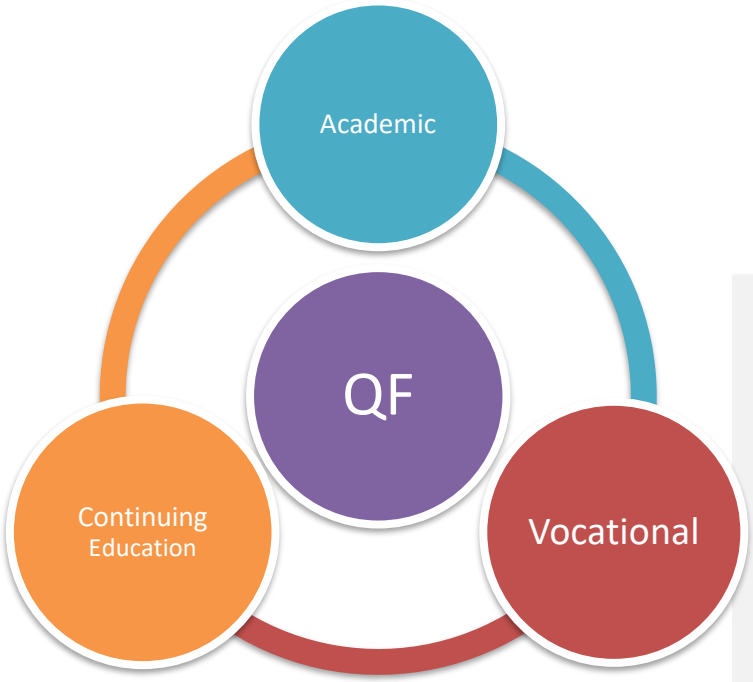
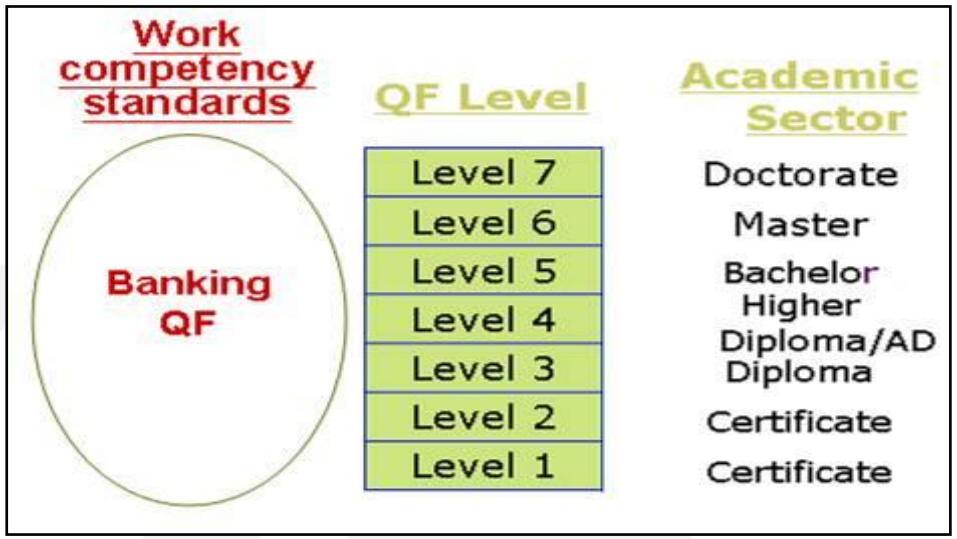
# Qualifications Framework (QF)




Act as a platform to promote lifelong learning and facilitate articulation among ***academic***, ***vocational*** and ***continuing education*** sectors




A ***7-level*** hierarchy of qualifications, underpinned by a robust quality assurance (QA) mechanism

**Notional Learning Hours** =
Class contact hours +
Self-study hours + Assessment hours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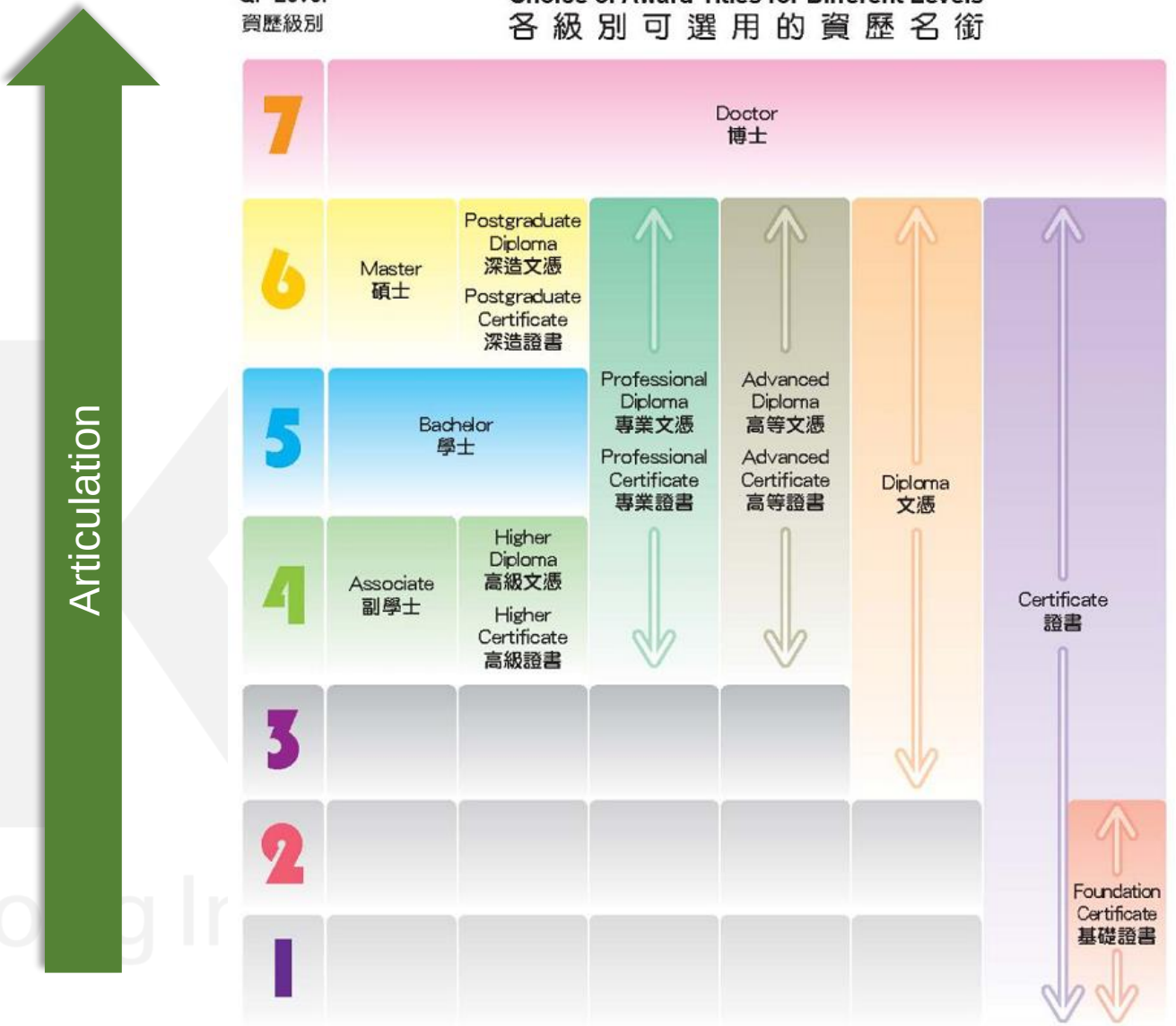
# Award Titles & QF Level

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https://www.hkqf.gov.hk/en/about-hkqf

# Generic Level Descriptors (GLD)

## Understanding the levels of QF-recognised Qualifications

All QF-recognised qualifications are assigned a QF level according to the GLD. To help **employers understand the level of a qualification possessed by their staff or job applicants**, the following table and examples of qualifications are used to highlight some of the key characteristics of each QF level.

## Applying GLD in the Workplace

**The GLD may be used to set the competency and performance standards for the execution of tasks in the workplace.** The following table provides examples drawn from the workplace.

| QF Level | Key characteristics | Examples used in the workplace | |
|---|---|---|---|
| 7 | **Create** new or original work | **Innovate and drive new and original** business strategies based on solid insights into future outlook to support organisational development | |
| 6 | **Critically evaluate new** information, concepts and evidence **from a range of sources** and **develop creative responses to routine and abstract** professional problems and issues | **Conduct research** on customer profiles, business processes, market supply and demand, and industry trends **to contribute to change and development** in the organisation | |
| 5 | **Formulate evidence-based** responses | **Design** sales team incentive**plans that take into account** the organisation's sales **strategies**, marketing **objectives**, and development **trends** of the retail market | |
| 4 | **Carry out routine lines of enquiry** to address professional level issues and problems | **Evaluate** sales performance, inventory and manpower resources, and **make corresponding adjustments and frontline suggestions for improving efficiency** | |
| 3 | **Make generalisations and predictions** in **familiar** contexts | **Monitor** sales performance and **motivate the team to achieve individual and team** sales **targets** | |
| 2 | **Solve problems** by using **rehearsed stages** | **Recommend** products that meet customers' common needs, **making reference to product information provided by the organisation** | |
| 1 | **Recall** learnt responses | **Handle** selling by **recalling** the features, advantages and benefits of the products/services | |

Example of Qualification : Master of Science in Retail Business Management (QF Level 6)
Example of a Learning Outcome : Critically evaluate the key issues and trends faced by the retail industy

Example of Qualification : Professional Diploma in Retail Management (QF Level 4)
Example of a Learning Outcome : Carry out routine lines of enquiry to support the decision making of the professionals and managers

Example of Qualification : Certificate in Customer Service (QF Level 2)
Example of a Learning Outcome : Ues different service techniques in handling customers' common needs

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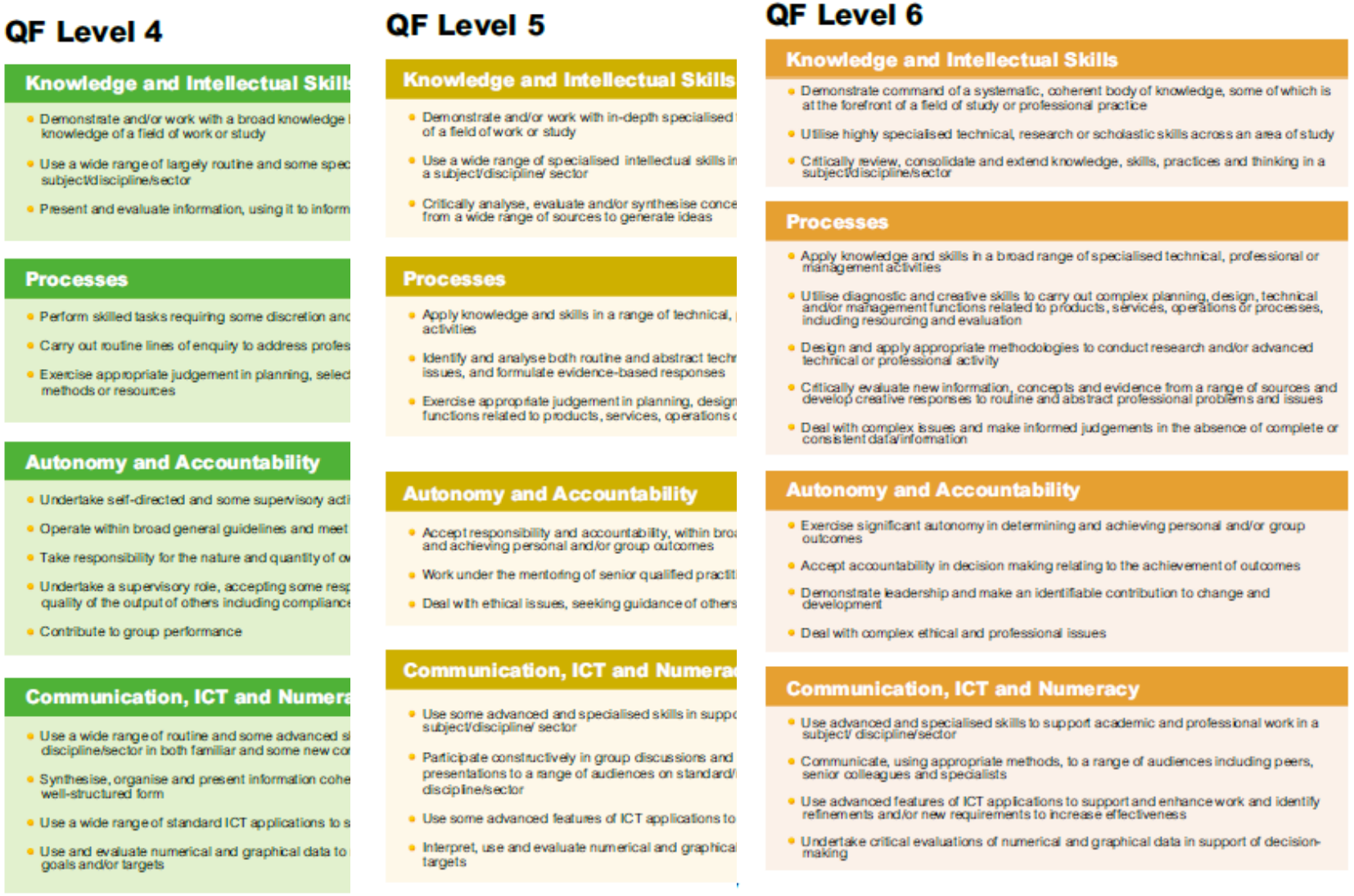
https://hkqf.gov.hk/files/record/qf-lvl-resources/1/Reference%20for%20Employers_Eng_April_2018-1703060432.pdf

# Generic Level Descriptors (GLD) Examples of QF Level 4-6



## QF Level 4

### Knowledge and Intellectual Skills

- Demonstrate and/or work with a broad knowledge
  knowledge of a field of work or study
- Use a wide range of largely routine and some spec
  subject/discipline/sector
- Present and evaluate information, using it to inform

### Processes

- Perform skilled tasks requiring some discretion and
- Carry out routine lines of enquiry to address profes
- Exercise appropriate judgement in planning, selec
  methods or resources

### Autonomy and Accountability

- Undertake self-directed and some supervisory acti
- Operate within broad general guidelines and meet
- Take responsibility for the nature and quantity of o
- Undertake a supervisory role, accepting some resp
  quality of the output of others including compliance
- Contribute to group performance

### Communication, ICT and Numera

- Use a wide range of routine and some advanced s
  discipline/sector in both familiar and some new co
- Synthesise, organise and present information cohe
  well-structured form
- Use a wide range of standard ICT applications to s
- Use and evaluate numerical and graphical data to
  goals and/or targets

## QF Level 5

### Knowledge and Intellectual Skills

- Demonstrate and/or work with in-depth specialised
  of a field of work or study
- Use a wide range of specialised intellectual skills in
  a subject/discipline/ sector
- Critically analyse, evaluate and/or synthesise conce
  from a wide range of sources to generate ideas

### Processes

- Apply knowledge and skills in a range of technical,
  activities
- Identify and analyse both routine and abstract techr
  issues, and formulate evidence-based responses
- Exercise appropriate judgement in planning, design
  functions related to products, services, operations

### Autonomy and Accountability

- Accept responsibility and accountability, within broa
  and achieving personal and/or group outcomes
- Work under the mentoring of senior qualified practit
- Deal with ethical issues, seeking guidance of others

### Communication, ICT and Numera

- Use some advanced and specialised skills in suppo
  subject/discipline/ sector
- Participate constructively in group discussions and
  presentations to a range of audiences on standard/
  discipline/sector
- Use some advanced features of ICT applications to
- Interpret, use and evaluate numerical and graphical
  targets

## QF Level 6

### Knowledge and Intellectual Skills

- Demonstrate command of a systematic, coherent body of knowledge, some of which is at the forefront of a field of study or professional practice
- Utilise highly specialised technical, research or scholastic skills across an area of study
- Critically review, consolidate and extend knowledge, skills, practices and thinking in a subject/discipline/sector

### Processes

- Apply knowledge and skills in a broad range of specialised technical, professional or management activities
- Utilise diagnostic and creative skills to carry out complex planning, design, technical and/or management functions related to products, services, operations or processes, including resourcing and evaluation
- Design and apply appropriate methodologies to conduct research and/or advanced technical or professional activity
- Critically evaluate new information, concepts and evidence from a range of sources and develop creative responses to routine and abstract professional problems and issues
- Deal with complex issues and make informed judgements in the absence of complete or consistent data/information

### Autonomy and Accountability

- Exercise significant autonomy in determining and achieving personal and/or group outcomes
- Accept accountability in decision making relating to the achievement of outcomes
- Demonstrate leadership and make an identifiable contribution to change and development
- Deal with complex ethical and professional issues

### Communication, ICT and Numeracy

- Use advanced and specialised skills to support academic and professional work in a subject/ discipline/sector
- Communicate, using appropriate methods, to a range of audiences including peers, senior colleagues and specialists
- Use advanced features of ICT applications to support and enhance work and identify refinements and/or new requirements to increase effectiveness
- Undertake critical evaluations of numerical and graphical data in support of decision-making

https://hkqf.gov.hk/files/record/qf-lvl-resources/6/The%20revised%20GLD%20and%20the%20Explanatory%20Notes_Eng_April_2018-1703059799.pdf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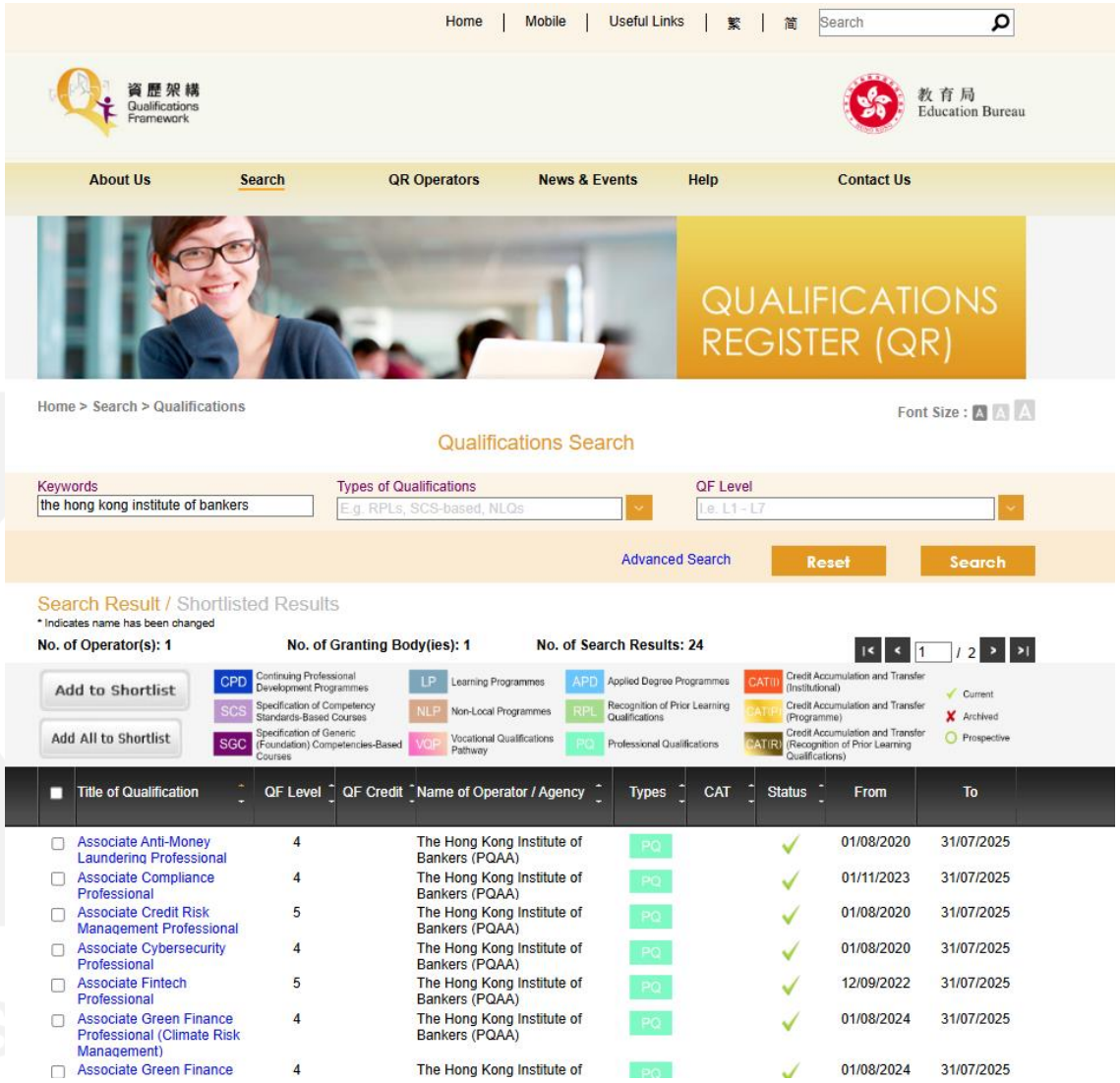
# Where to find the QF-recognised Professional Qualifications (PQ)?

## Qualifications Register (QR)




https://www.hkqr.gov.hk/HKQRPRD/web/hkqr-en/search/qr-search/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# Programme Development Process Overview

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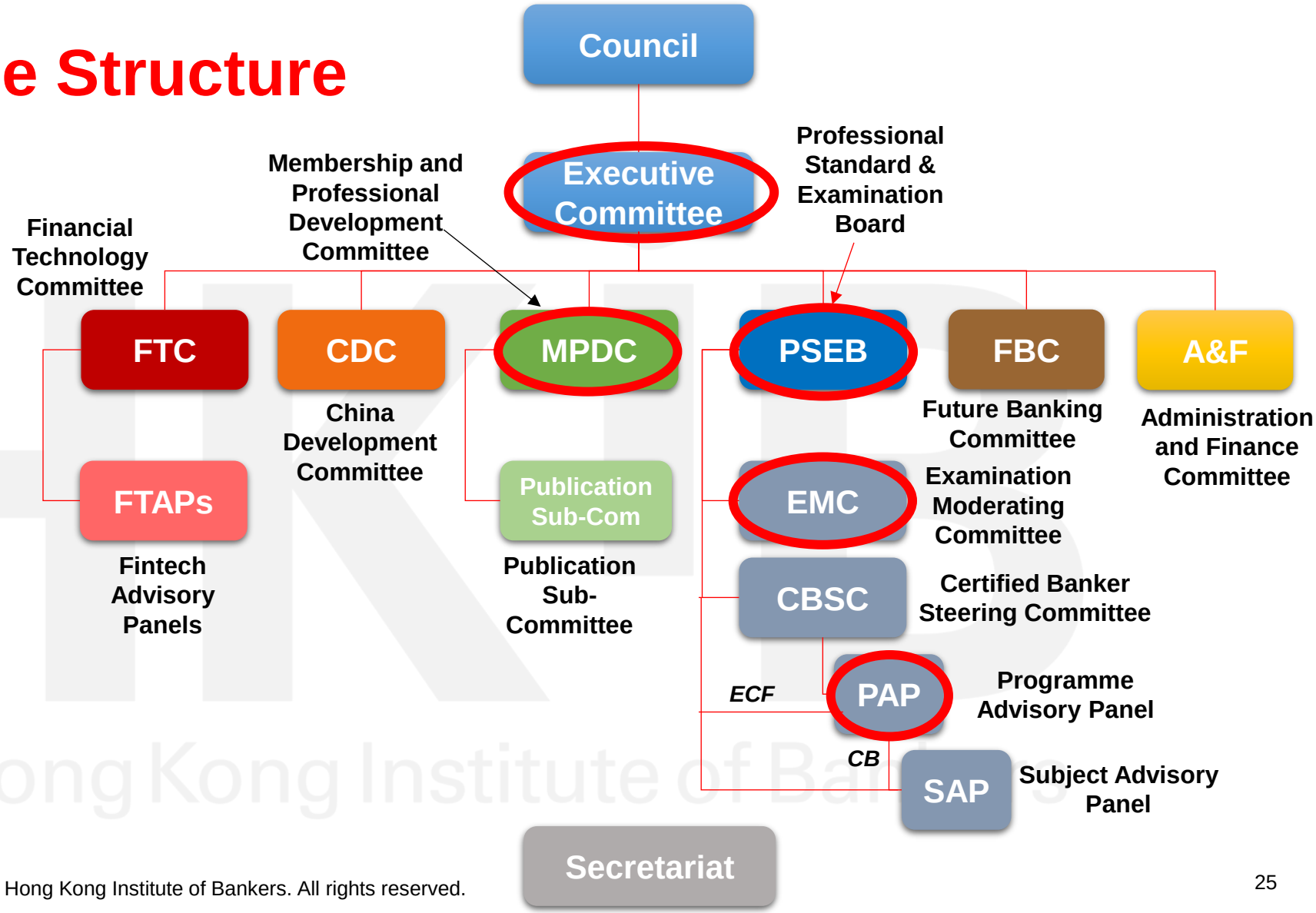
# HKIB – Governance Structure

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# HKIB Programme Development QA Mechanism

## KEY COMPONENTS

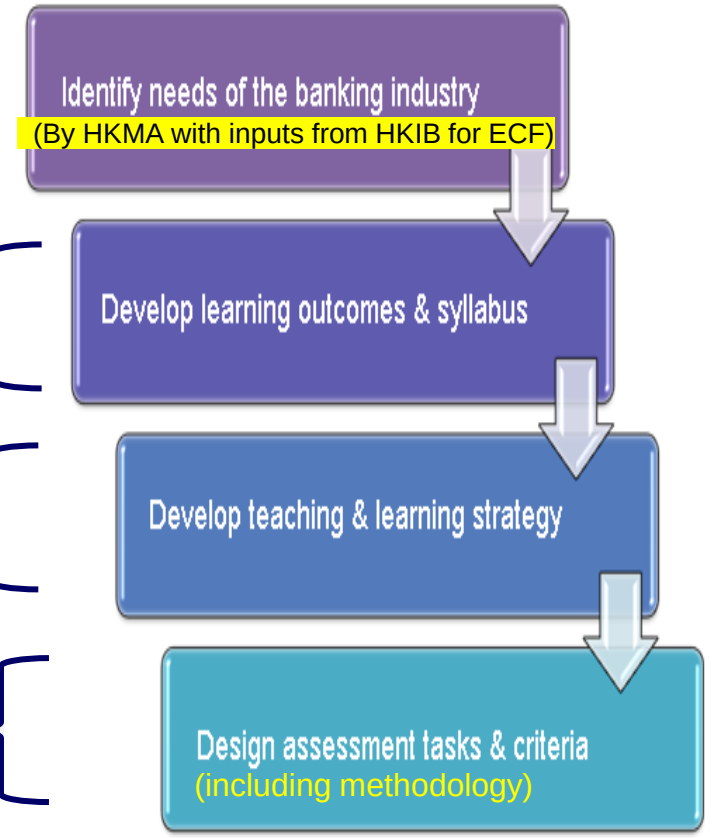
1. Role and tasks competency requirement identification
2. Industry Consultation (for ECF)
3. Issuance of Guideline (for ECF)

1. Programme Objective
2. PQ and Module Qualifications Intended Outcomes
3. UoCs Mapping
4. Syllabus/Topics/Recommended Readings

1. Training materials
2. In class activities
3. Self-study activities

1. Examination (MC/Essay/Case Study)

## DEVELOPMENT PROCESS




## QUALITY ASSURANCE

- **Maker**: Secretariat / ECF Steering Committee (HKMA)/ Regulator / etc.
- **Checker:** HKIB Committees (EC,MPDC,PSEB,CDC,FTC,SAP/PAP)

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- **Maker:** Writers/Trainers / Secretariat /Regulator
- **Checker:**
  - Reviewer/SAP/PAP/Secretariat

- **Maker:** Examiners
- **Checker:**
  - Moderators
  - Examination Moderating Committee (EMC)
  - PSEB
  - Secretariat


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# Programme Development Process (I)

## Step 1: Identify the learning needs

- *HKIB keeps close contact with stakeholders and review the human capital landscape, Certified Banker Steering Committee (CBSC)*
- *HKMA: Enhanced Competency Framework ("ECF") / ECF Steering Committee*

## Step 2: Specify the Intended Outcomes and UoCs of the Programme / Modules

- *Programme Development and Accreditation (PDA) Task Group / HKMA / PAP / SAP / Writer*
  - *Training needs*
  - *Programme Objectives*
  - *Professional Qualification/Module Intended Outcomes (PQIOs/MIOs) will be developed to address the concerned UoCs stipulated in the Specifications of Competency Standard (SCS).*

## Step 3: Assign a QF Level to the programme

- *Mapping the MIOs against the outcome standards specified for that level under one (or more) of the four domains of the GLDs as well as the concerned UoCs*

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# Programme Development Process (II)

## Step 4: Develop the teaching and learning plan for the programme

- *Identify the teaching and learning materials for the module*
- *Involved in the development of the Study Guide and other resources for the module.*

## Step 5: Specify the assessment methods for the module

- *Examiners / PDA Task Group / PAP / SAP*
  - *Recruiting examiners*
  - *Select appropriate assessment method and types of assessment*
  - *Development of the assessment*

## Step 6: Estimate the notional learning time

- *Estimated based of an average learner*

*(working professionals who have full-time employment, the current programme places strong emphasis on self-directed learning)*

## Step 7: Assign QF credit value to the module

- *Calculate QF credit value by dividing the total NLHs by 10*
- *The total number of QF credit value of all modules of the programme will be the QF credit of the programme*

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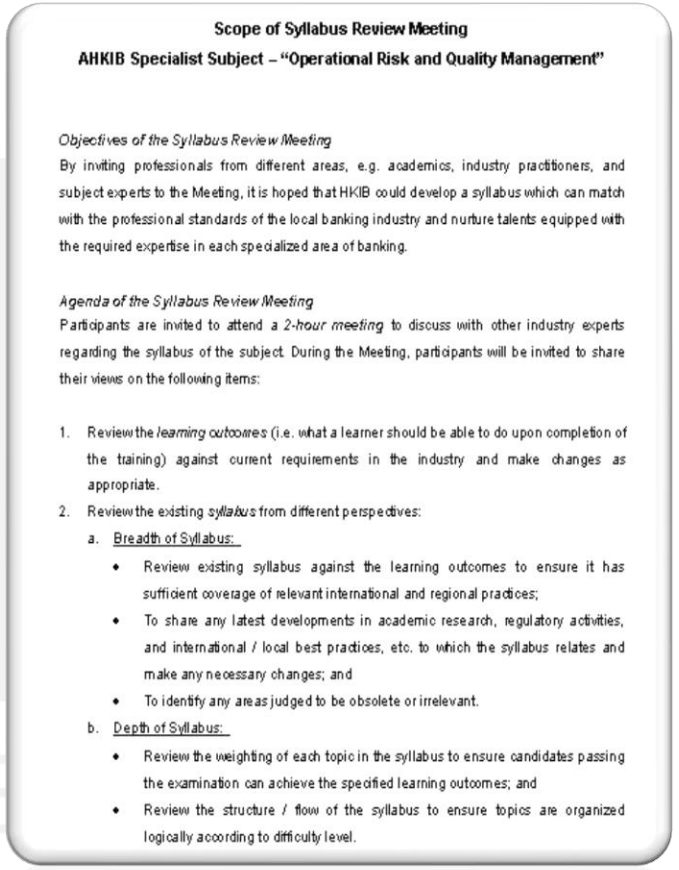
# Continuous Programme Review

## The Development & On-going Management Process

- Annual update by examiners and trainers (Solicited feedback from trainers, learners; endorsed by PDA for content enhancement; Endorsed by Exam Moderating sub-Committee (EMC) for exam part)

- Holistic review exercise (conducted every 5 years) (Solicited feedback from trainers, learners, focus groups, surveys, evaluation analysis, PAP, etc.; Endorsed by sub-committees including MPDC and PSEB, then Approved by EC for major updates for content enhancement; Endorsed by Exam Moderating sub-Committee (EMC) for exam part)



**Scope of Syllabus Review Meeting**

**AHKIB Specialist Subject – "Operational Risk and Quality Management"**

*Objectives of the Syllabus Review Meeting*

By inviting professionals from different areas, e.g. academics, industry practitioners, and subject experts to the Meeting, it is hoped that HKIB could develop a syllabus which can match with the professional standards of the local banking industry and nurture talents equipped with the required expertise in each specialized area of banking.

*Agenda of the Syllabus Review Meeting*

Participants are invited to attend *a 2-hour meeting* to discuss with other industry experts regarding the syllabus of the subject. During the Meeting, participants will be invited to share their views on the following items:

1. Review the *learning outcomes* (i.e. what a learner should be able to do upon completion of the training) against current requirements in the industry and make changes as appropriate.
2. Review the existing *syllabus* from different perspectives:
   a. Breadth of Syllabus:
      - Review existing syllabus against the learning outcomes to ensure it has sufficient coverage of relevant international and regional practices;
      - To share any latest developments in academic research, regulatory activities, and international / local best practices, etc. to which the syllabus relates and make any necessary changes; and
      - To identify any areas judged to be obsolete or irrelevant.
   b. Depth of Syllabus:
      - Review the weighting of each topic in the syllabus to ensure candidates passing the examination can achieve the specified learning outcomes; and
      - Review the structure / flow of the syllabus to ensure topics are organized logically according to difficulty level.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# General Guidelines for Trainers

-FLEX Learning
-Key Highlights
-Facilitation Tips
-Training Evaluation

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# FLEX Learning – Virtual Classroom & eLearning

- ✓**Automated** payment service
- ✓**500+** online courses
- ✓Claimable for **HKIB CPD hours**

***Note: Please refer to Trainer Handbook for the details***


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# Key Highlights for Trainers (I)

- Understand and familiarize with the programme structure (i.e. details in Module Outline including Module Objectives, Module Intended Outcomes, Syllabus, Assessment Methodologies and Recommended Readings) and materials (e.g. Programme Handbook, Essential Readings including HKIB Study Guide/Text Book, PPTs, Lesson Plan & etc.)
- Link back the learning to defined UoCs requirements for SCS based programmes
- Focus on:
  - Standards (Competence)
  - Quality
  - Relevancy
  - Practicality

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# Key Highlights for Trainers (II)

- Participate in Programme / Subject Advisory Panel (PAP/SAP), if appropriate
- Provide feedback on content and materials development and enhancement
- Review and update the power points or lesson plan, if necessary
- Deliver training class as per lesson plan
- Provide up-to-date cases/examples/references/market information & etc. during the class delivery
- Collect feedback from learners or HKIB for continuous learning
- Adopt interactive approach to facilitate discussion and learning

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# Facilitation Tips: Opening

**Setting the Stage at the Opening of the 1st Session**

- Welcome & Self Introduction
- Remind Learners to watch Programme Kick-off video
- Highlight the purpose and benefits for the learners
- Briefly introduce module objectives, module intended outcomes and methodologies adopted, assignment requirement, if any
- Highlight the uniqueness of the programme (i.e., focus on banking environment to ensure relevancy, application rather than just theories sharing, QF-recognized professional qualification) to promote learning
- Introduce the available training materials for support their learning and exam preparation
- Logistics arrangement (i.e., attendance requirements, break arrangement, etc.)
- Time arrangement (i.e., no. of sessions, duration)
- Ground rules (e.g., use of mobile, be participative, be respectful to others, etc.)

**Opening of Subsequent Sessions**

- Greetings
- Quick recap of what have learnt in the last session

**Opening of Each Chapter**

- Introduce the chapter learning outcomes
- How the learning outcomes related to the Relevant Practitioners


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# Facilitation Tips: During the Training

- Arrive the venue at least 15 mins before the training starts
- Have good time management and try to align with the time allocated in Lesson Plan
- Increase the participation rate by employing different training methodologies as appropriate, e.g.
  - Individual exercise (100%)
  - Pair up exercise (50%)
  - Group discussion with 3-5 persons in a group (25%)
  - Plenary discussion (5%)
- Ensure reserve sufficient time for the class to discuss and report back if group discussion is adopted.
- For plenary discussion, the question will be shared to whole class for discussion. Thus, more than 1 learner (ideally at least 3 learners) should be invited for sharing his/her views.
- Create interest and draw attention by quoting more real-life examples/cases
- Avoid reading the slides line by line
- Go through the Chapter Summary and Review Questions to consolidate their learning, checking understanding and allowing more time for reflection
- Link back the discussed contents to the essential readings and learning outcomes from time to time
- Encourage the learners to plan for self-studying
- Walk through the Mock Paper

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# Facilitation Tips: Closing

- Encourage the learners to study the essential readings well and get prepared for the exam
- Encourage the learners to pay attention to the market update
- Briefly highlight the exam format (e.g., mode of assessment, duration, no. of questions, etc.)
- Advise the learners to raise the questions to trainers via HKIB, if needed
- Contact HKIB for the programme details and exam arrangement, if needed
- Remind the learners to complete the online training evaluation

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# Training Evaluation

- Share the importance and implication of the end of training evaluation
- Remind the participants to complete the online **Training Evaluation**, in particular, explain the 6-point scale from **1- Strongly disagree** to **6-Strongly agree** to participants
- Review the consolidated participants' feedback for assuring quality delivery in future class

The Hong Kong Institute of Bankers 香港銀行學會

Training Evaluation Form 課程評估問卷

Thank you for taking the time to complete this programme evaluation form. Your feedback is highly appreciated and will help us continually enhance the services we offer.

我們感謝閣下完成此問卷，並為我們日後提升服務質素留下您的寶貴意見。

**Remarks:**

a. The personal data collected on this form will be treated as confidential and will be protected in accordance with local jurisdiction.

b. Participants, who attended the IIQAS CPD programme, can approach the Hong Kong Council for Accreditation of Academic and Vocational Qualification (HKCAAVQ) (Tel: (852) 3658 0000) for giving further feedback or comment, if any.

注意：

甲. 此問卷中所收集之所有個人資料將被保密，並受當地管轄法律之保護。

乙. 任何人如出席保險中介人質素保證計劃之課程，均可向香港學術及職業資歷評審局提出意見及反饋（如適用）(電話：（852）3658 0000)

Sign in to Google to save your progress. Learn more

Programme Title: Enhanced Competency Framework (ECF) on XXXX

Training Code: XXX

Date: XXXX (Live Lectures)
XXXX (VAT Sessions)


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# Support from HKIB

## -New Trainer Welcome Kit

## -Relationship Maintenance

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# New Trainer Welcome Kit

Single link for accessing online referencing materials, included:

- ✓ Trainer Handbook
- ✓ Briefing to Trainer – PowerPoints
- ✓ Programme Module Outline
- ✓ Programme Handbook, Brochure and Flyer
- ✓ Programme Mock Paper
- ✓ HKQF Factsheet
- ✓ Generic Level Description of QF (L1 – L7)
- ✓ Supervisory Policy Manual CG-6 “Competence and Ethical Behaviour” by the Hong Kong Monetary Authority
- ✓ Training  Evaluation Form
- ✓ Class Observation Form
- ✓ Location Map of HKIB

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# Relationship Maintenance with Service Providers

- **Protecting your interests**
  - Gain better support through proper orientation and guidelines
  - Avoid breaching any ordinance or regulations
- **Maintaining and uplifting the professionalism**
  - Support you to achieve CPD requirements
  - Enrich your knowledge related to HK Qualifications Framework
  - Update personal profile and bio to gain more possible business opportunities
  - Gain the complimentary seats of seminars/training/conference from HKIB as learning or development opportunities
- **Building professional network**
  - Work with different professionals or practitioners for knowledge and skills sharing

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# Key Documents for Protecting Trainer and HKIB's Interests

- **Job Application Form** for Trainer/Examiner/Writer/Reviewer/ Moderator as appropriate
- **Professional Service Agreement** (within 2 years' Service Period from 1 April 2024 – 31 March 2026) which includes Disclosure Form for Potential Conflicts of Interest
- **Personal Profile**
- **Bio**
- **Confirmation Letter** upon having agreement on the specific services

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# Government Subsidy Schemes

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# Training Subsidy for Fintech Practitioners

## (Eligible course includes ECF on Fintech M1-M11)

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# The Pilot Scheme on Training Subsidy for Fintech Practitioners

- New Initiative by HKSARG –
  - focused on strengthening talent development in the local finance industry by actively implementing the development of professional qualifications recognised by the Qualifications Framework for Fintech practitioners
  - providing subsidies to those who have obtained such qualifications
- Application through the Banks
- A pilot scheme, Training Subsidy for Fintech Practitioners, will be implemented to reimburse 80% of the tuition fees for practitioners who have attained Fintech professional qualifications.
- Around 1,500 places will be offered.


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# Training Subsidy for “Pilot Programme to promote talent training for the asset and wealth management (WAM) sector”

## (Eligible course includes CB Stage, ECF on AML/CFT, ECF on RWM, ECF on Compliance Module 5 and CPWP)

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# Pilot Programme to promote talent training for the asset and wealth management sector

提升資產財富管理業人才培訓先導計劃
Pilot Programme to Enhance Talent Training for the Asset and Wealth Management Sector

- The Hong Kong Government has launched a three-year Pilot Programme to promote talent training for the asset and wealth management (WAM) sector since 1 October 2016 and extended to the programme until **31 March 2026**.
- The main purpose of the programme is to facilitate the long-term sustainable development of the sector by attracting more talents and enhancing the professional competency of the in-service practitioners in the asset and wealth management area.
- It encourages financial services industry practitioners to acquire and upgrade professional skills in the asset and wealth management field.
- Attendees of Eligible Courses can apply for 80% subsidy of the course fees (training only) **FOUR** months from the course end date.


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# Training Subsidy for “Pilot Green Sustainable Finance Capacity Building Support Scheme”

## (Eligible course includes CB Stage II – GFS and ECF-GSF Core Level M1-4)

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# Pilot Green Sustainable Finance Capacity Building Support Scheme

- Current practitioners in financial services industry or other practitioners whose roles are relevant to green and sustainable finance can apply for reimbursement up to **80%**, whereas eligible students of relevant disciplines can apply for **100%** reimbursement
- Application deadline is on or before **12 December 2025**.

Go to https://www.greentalent.org.hk/ and select "Individuals"

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# Thank you

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