



Chartered
Insurance
Institute

Appointment of

Executive Director, Strategy, Advocacy and Professional Standards

September 2024
Reference: AATAED

Saxton Bampfylde



Introduction

The Chartered Insurance Institute (CII) is a professional body dedicated to building public trust and confidence in the insurance and financial planning professions. We have a global reach with hubs in London, Hong Kong and Dubai, and members and affiliates across the world.

Insurance underpins our whole economy. Almost everyone depends on insurance in some way to live their lives. Insurance creates networks between people and businesses that provide confidence to invest and that can help when something goes wrong. At the CII we help develop technically competent, ethically focused practitioners and practice that people can depend on.

Similarly, on the back of the cost of living crisis it is more important than ever before that people can make the most of their resources. Through the Personal Finance Society, part of the CII group, we work to

build public trust in the financial planning professions so that everyone can have confidence in getting the quality advice that we know gets better outcomes.

Almost every issue affecting the domestic and global economy today is relevant to the professions that form our membership, including AI and technology, climate change, inclusion & vulnerability, and global conflict.

We deliver our mission through relevant learning, insightful leadership and an engaged membership. Our 122,000 members commit to high professional standards by maintaining continuing professional development and adhering to a published ethical code.

We'd like you to join us in that mission and help provide ever greater financial resilience for individuals and societies more broadly.

What we do



For our members

The CII group comprises the foremost professional bodies in insurance and financial planning. We provide a wide range of internationally recognised qualifications and memberships. We support the training and professional development of practitioners across the world. We complement that with a range of professional networks, building on our dedicated local Institutes led by our fantastic volunteers.



For corporates

We work closely with employers to support staff in their professional development. We provide a range of products to help firms build a professional workforce, and tools to help them make practical sense of regulatory and other obligations.



For the public

We help build public trust in the insurance and financial planning professions so that everyone can have confidence in making use of the services they provide.

**“Our vision is that
CII and PFS
professionals build
a world which
delivers ever
greater financial
resilience for
individuals and
societies more
broadly.”**



The opportunity

The CII is now looking for an Executive Director, Strategy, Advocacy & Professional Standards

This is a new role, working at the highest level of executive leadership at the CII. We are in the process of transforming the way CII is led, with a clear focus on collaboration in the interests of the whole Institute and its members. The first responsibility for any Executive Director is, therefore, to work with colleagues to lead the Institute effectively, ensuring a focus on purpose, performance, and value for money.

Each Executive Director is, however, asked to focus on particular areas of interest on behalf of the team. For this role, the mission comprises:

- Ensuring alignment of the Royal Charter objectives, strategy, policy and operational delivery.
- Embodying the Institute's "thought leadership" ambitions by developing a compelling evidence base and using it to drive change through relationships with Government, Parliament, regulators, the professions and other partners and stakeholders.
- Moving the Institute's approach to promoting, embedding, and securing high professional standards across insurance and financial planning to a new level.

Success in the role will see the Institute recognised for its strength of purpose and achievement; its ability to influence policy and regulatory agendas constructively and in the public interest; and an approach to building and maintaining professional standards that others would wish to emulate.

Key responsibilities

Strategy

The Executive Director, Strategy, Advocacy and Professional Standards will lead the development and implementation of the CII's strategic plan, working across the whole Institute to ensure we deliver on the vision, mission and goals set out in our Royal Charter to build and maintain public trust and confidence. They will be a focal point for planning and performance, leading on the annual planning process and ensuring alignment and progress towards the delivery of the strategic plan, and will need to have the confidence and credibility to engage across the whole organisation.

Advocacy

The role will be central to the Institute's ambition to become the "go to" source of intelligent analysis and informed views on insurance and financial planning. They will develop our evidence base, strengthening our systems information gathering and analysis, including our formal research activities, and convert that analysis into a compelling public agenda for change.

They will identify key opportunities to pursue that agenda in the public interest by developing a strong professional network including industry partners, regulators and policy makers, opinion formers, the media and third sector groups, government officials, and advocacy groups. They will serve as a primary spokesperson for the Institute on matters of strategy and policy.

Professional Standards

Being a member of the CII means committing to high standards of ethics and behaviours. This role will lead our efforts to ensure that our standards are meaningful, and both a source of guidance and pride for our members. This is an area of significant opportunity for the CII and the Executive Director will help us develop our approach in this area, while delivering our existing obligations as a body accredited by the FCA for the purposes of issuing statements of professional standing.



Person specification

Requirements

Strategic delivery: Demonstrated ability to align strategy, policy and operations to deliver strong purpose and high performance.

Leadership skills: Proven track record of effective leadership, with the ability to inspire and motivate teams, drive performance, and cultivate a culture of collaboration and improvement.

Relevant experience: Strong senior experience in strategy, policy, public affairs or professional standards, with exposure at board level. Understands and values the relevance of our Royal Charter in terms of the public interest, while recognising that it is our amazing members who provide our foundation.

Communications and engagement: Excellent communication and relationship-building skills, with the confidence and energy to influence a range of external partners. Public engagements will be a key part of the role.

Strong analytical/policy skills: The ability to grasp a range of complex issues affecting the insurance and financial planning sectors, and to convert that understanding into sensible and achievable programmes of action.



Person specification

Expected Behaviours

As an Executive Director, you are expected to exhibit exemplary leadership behaviours that foster a positive and productive CII culture. This includes consistently demonstrating integrity, transparency, and accountability in all interactions and decisions. Building trust is paramount; therefore, you must communicate openly, listen actively, and engage with all stakeholders with respect and honesty.

Ensuring consistency in your actions and decisions will reinforce reliability and predictability, key elements in establishing a trustworthy environment. Your leadership should inspire confidence and commitment, promoting a culture where ethical standards and the Institute's values are upheld, and where every team member feels valued and empowered to contribute to the CII's success.

Furthermore, the Executive Director will play a pivotal role in leading and nurturing our talented team, fostering a culture of excellence, collaboration, and innovation. Your responsibilities will include, guiding talent acquisition and development efforts,

and ensuring the well-being and professional growth of our employees. You will be responsible for setting clear performance expectations, offering regular feedback, and coaching, and resolving conflicts in a timely and constructive manner.

You will champion diversity and inclusion initiatives, promote open communication and transparency, and uphold the highest standards of ethics and professionalism. Your leadership in people management will be critical in driving CII's success and creating an equal, diverse, positive, and rewarding work environment for our team.



Terms of Appointment

- **Location:** London
- **Position type:** Full Time Permanent
- **Grade:** 1
- **Department:** Strategy, Advocacy and Professional Standards
- **Reporting to:** CEO
- **Salary:** Competitive, including short-term and long-term incentive schemes.

Due diligence

Due diligence will be carried out as part of the application process, which may include searches carried out via internet search engines and any public social media accounts.

Equal Opportunity Employer

The Chartered Insurance Institute is an equal opportunity employer. We celebrate diversity and are committed to creating an inclusive environment for all employees.

This job description is intended to provide a general overview of the position and does not encompass all responsibilities and qualifications required for the role. The Institute reserves the right to modify the job description as needed.



How to apply

Saxton Bampfylde Ltd is acting as an employment agency advisor to the CII on this appointment.

Candidates should apply for this role through our website at www.saxbam.com/appointments using code **AATAED**.

Click on the 'apply' button and follow the instructions to upload a CV and cover letter and complete the online equal opportunities monitoring* form.

The closing date for applications is **noon on Monday 30 September 2024**.

GDPR personal data notice

According to GDPR guidelines, we are only able to process your Sensitive Personal Data (racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership, genetic data, biometric data, health, sex life, or sexual orientation) with your express consent. You will be asked to complete a consent form when you apply and please do not include any Sensitive Personal Data within your CV (although this can be included in your covering letter if you wish to do so), remembering also not to include contact details for referees without their prior agreement.



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