



Chartered  
Insurance  
Institute

Appointment of

# Executive Director, Learning

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Reference: AATAEG

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.

Founded in 1912 and incorporated by Royal Charter, the CII supports more than 125,000 members around the world, with offices in London, Dubai and Hong Kong.

Our strategy and public value model define how we build trust and confidence, directing what we do, who we serve, and the impact we are seeking to achieve.

Our members commit to continuous professional development and to upholding a robust Code of Ethics, reflecting our belief that professional competence and ethical behaviour are fundamental to public trust. In return, the CII provides high-quality learning, world-class qualifications, inspiring professional communities, and carefully crafted tools to support members throughout their careers.

Chartered status sits at the heart of the CII's proposition. It is a widely respected mark of excellence, signifying that an individual or organisation has met rigorous standards of professionalism, technical competence and ethical practice, and is committed to maintaining them.

The CII also plays a significant role in shaping the future of insurance and financial planning. We work closely with regulators, employers, policymakers and other professional bodies to influence standards, develop best practice and respond to emerging challenges and opportunities across the professions we serve.

We are now seeking an exceptional leader to join us and help deliver our commitment to driving confidence in the power of professional standards.



# Mission Statement



“ *The overarching purpose of the Institute is to educate and support our members to deliver services to the highest professional standards and to advocate for the public good. By doing this the Institute builds and maintains public trust in the insurance, financial planning and mortgage advice professions.*



## Our Vision

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, Learning**

The Learning Directorate ensures that the Chartered Insurance Institute sets and maintains the benchmark for professional competence across the insurance and personal finance sectors worldwide.

We design and deliver high-quality learning, qualifications, and assessment pathways that support career-long development, strengthen professional standards, and enhance public trust.

Through innovation, digital enablement, and close industry collaboration, we create accessible, future-focused learning experiences that equip professionals with the skills, capability, and confidence to meet the evolving needs of the sector.

We have embarked on a wholesale transformation of our qualifications framework and delivery model, which you will have the opportunity to lead.

## **Job Purpose**

The Executive Director, Learning is accountable for shaping and delivering the CII's global learning, qualifications and assessment strategy.

The role ensures the CII continues to set the benchmark for professional competence across the insurance and personal finance sectors, providing members and learners with high-quality learning pathways, assessments, and professional development experiences that enhance public trust.

This role leads the transformation of our learning and qualifications portfolio, ensuring it remains relevant, forward-looking and digitally enabled. It provides authoritative leadership on professional standards, competency frameworks, accreditation, and learning innovation to strengthen the CII's status as the gold standard for professional development.



# Key Responsibilities

**Strategic Leadership** - Develop and execute a multi-year Learning strategy aligned to the institute's mission and membership value proposition. Lead the transformation of learning, assessment, and CPD models to meet changing member, customer, and industry needs. Advise the CEO and Board on trends in professional learning, regulatory standards, and future skills. Drive innovation in learning products, pathways, and delivery models to ensure accessibility, relevance, and commercial sustainability.

**Learning, Qualifications & Assessment** - Oversee the full lifecycle of qualifications, assessments, exams, and accreditation frameworks. Ensure all learning content and exams meet rigorous quality, compliance, and regulatory standards. Lead regular reviews of qualifications and learning products to maintain relevance and global competitiveness. Champion a consistent competency framework that underpins professional standards for members.

**Digital Learning & Product Innovation** - Lead the development of digital learning platforms and technology-enabled assessment solutions. Introduce scalable learning formats (online, blended, micro-credentials, modular pathways). Ensure learning products are insight-driven, user-centred, and deliver excellent learner experience.

**Industry, Employer & Regulatory Engagement** - Strengthen partnerships with colleagues, members and customers, regulators, education providers, and sector partners. Ensure our learning and qualification strategy reflects current and emerging industry needs.

**Commercial & Operational Leadership** - Drive revenue growth in learning and qualification portfolios while ensuring educational integrity. Oversee budgets, forecasting, pricing, and commercial performance of the learning portfolio. Ensure learning operations (content development, assessment logistics, QA, accreditation) run efficiently and effectively.

**Leadership & Culture** - Lead and develop high-performing teams across learning, assessment, professional standards, and product innovation. Foster a culture of collaboration, continuous improvement, and evidence-based decision-making. Role-model the institute's values and contribute to a cohesive Executive Leadership Team.



# Person Specification

## Experience

Significant senior leadership experience in professional learning, qualifications, higher/continuing education, accreditation, or assessment-based organisations. Proven track record of developing and delivering large-scale learning, qualifications, or credentialing strategies.

Experience overseeing assessment frameworks, regulatory compliance, and quality assurance. Demonstrated leadership in digital learning transformation, including online platforms, product innovation or technology-enabled assessment models.

Evidence of commercial acumen – managing revenue portfolios, forecasting, pricing and product development. Experience influencing and partnering at Executive and Board level and representing an organisation externally.

Experience leading multi-disciplinary professional teams through change and growth.

Experience working with global markets and/or membership bodies advantageous.

## Skills & Capabilities

Strategic thinker with ability to set long-term vision and translate it into actionable delivery plans. Strong stakeholder management and relationship-building skills, able to engage employers, regulators, education bodies, members and learners.

Data-led decision maker, comfortable with performance metrics and insight-driven prioritisation. Change leadership capability – able to lead transformation, modernisation and cultural development. Strong communicator able to influence, inspire and articulate vision internally and externally. Financial literacy with ability to manage budgets and commercial performance effectively.



# Person Specification

## Knowledge

Deep understanding of Learning trends, continuing professional development (CPD), future skills and workforce capability needs. Knowledge of qualification frameworks, examination standards, accreditation and regulatory requirements. Understanding of digital learning ecosystems, emerging education technologies, micro-credentials and modular learning models. Skilled in modern learning design methodologies, competency frameworks, and assessment models. Awareness of insurance, financial planning or other professional services sectors is helpful (desirable rather than essential).

## 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 working collegially with peers to address wider strategic and tactical issues 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 ensuring relationships are effectively built and maintained.

Additionally, 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:** Permanent

**Career Framework:** Executive Director

**Department:** Learning

**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 colleagues.

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.





Personal  
Finance  
Awards  
2025/26

# 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](http://www.saxbam.com/appointments) using code **AATAEG**.

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 9 February**.

## **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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