



Chartered
Insurance
Institute

Appointment of

Executive Director, Member Engagement

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Reference: AATAEF

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, Member Engagement

The Chartered Insurance Institute has around 125,000 members across two professions – insurance and financial planning (our financial planning members have a dedicated society, the Personal Finance Society, that focuses on their needs in particular).

Our Royal Charter mission is to build public trust and confidence in insurance and financial planning, so people and businesses can make the most of the benefits that they bring to society.

We derive our strength from our committed members and volunteers across both professions, in the UK and abroad.

The Executive Director, Member Engagement will ensure that members are supported and connected to enable them to deliver public trust and confidence. They will support our professional communities, whether digital or in person, and help take our volunteer networks – the Local Insurance Institutes and the PFS Regional Committees – to the next level of influence and effectiveness.

There are two other important headlines:

- The Executive Director, Member Engagement will work collaboratively as part of the Executive Leadership Team to lead the Institute and all its constituents. In doing so, they will ensure that a membership perspective is brought to all Executive decisions.
- They will ensure that the Board of the Personal Finance Society, its Chair and members, is supported effectively, including in its member and public engagement. The role is a complex one, operating across both the CII and PFS and taking into account relevant frameworks including the PFS Articles of Association and CII Group Operating Protocol.

Job Purpose

The Executive Director, Member Engagement provides enterprise-wide leadership to maximise the value, influence, and impact of membership across the Chartered Insurance Institute and the Personal Finance Society, in the UK and abroad.

The role develops and drives the strategic vision for how the Institute engages, supports, and champions its diverse membership communities, ensuring full alignment with organisational purpose and strategic ambitions.

Operating with a strong external lens and deep stakeholder insight, the postholder leads a coherent, data-driven approach to member experience and professional engagement and works with colleagues to build a compelling programme of policy advocacy.

They are accountable for strengthening the proposition for members and firms, enhancing professional pride, and elevating the reputation and public trust of the insurance, financial planning, and mortgage advice professions.

Through confident leadership, collaborative partnerships, and a relentless focus on outcomes, the Executive Director, Member Engagement will ensure that membership both grows and provides a vibrant, influential, and positive experience.

In relation to the financial planning profession, a core component of the role is rebuilding and sustaining member trust through transparent communication and visible support for volunteer networks.



Key Responsibilities

- As part of the Executive Leadership Team, work collaboratively to lead the Executive in support of all the Institute's entities.
- Work collaboratively with the CII (including in its oversight of the Group) and PFS Boards, providing insight and support to enable them to fulfil their responsibilities to members. In relation to the PFS Board, to ensure the smooth operation of its day to day business.
- Ensure effective support for and development of Local Institute and PFS Regional Committee networks.
- Drive a member-centred engagement and value strategy, delivering initiatives that strengthen growth and retention, deepen professional connection, and support career-long development across the member lifecycle.
- Ensure a coherent, high-quality member experience, overseeing digital and physical touchpoints so they consistently reflect the Institute's standards, values, and brand, and reinforce trust and professionalism.
- Use data, insight, and performance intelligence to steer strategy, shaping decisions through robust KPIs for growth, engagement, satisfaction, and impact, and driving a culture of continuous improvement.
- Represent the Institute with authority and credibility, forging strategic partnerships, advocating for the interests of members, and enhancing public trust in the insurance, financial planning, and mortgage advice professions.

Person Specification

Qualifications & Professional Background

Proven senior leadership experience in membership, professional associations, or member-centric organisations, ideally within financial services, insurance, or professional education sectors.

An understanding of the insurance, financial planning, and mortgage advice professions, including regulatory and professional standards frameworks would be desirable.

Skills & Competencies

Demonstrated ability to develop and execute membership engagement strategies that deliver measurable impact on retention, satisfaction, and professional development.

Exceptional stakeholder management and influencing skills, with experience building relationships across internal teams, boards, and external partners.

Data-driven decision-making capability, using insight and analytics to inform strategy, track performance, and drive continuous improvement.

Strong communication and presentation skills, with the ability to represent the organisation credibly to members, partners, and the wider professional community.

Experience leading and developing high-performing teams, fostering collaboration, accountability, and a culture of excellence.

Personal Attributes

Strategic thinker with a member-focused mindset and a commitment to professional integrity and public trust.

Agile and innovative, with the ability to adapt to changing member needs, market trends, and organisational priorities.

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: Member Engagement

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.



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 **AATAEF**.

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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