



# CANDIDATE PACK

## GLOBAL DIRECTOR OF LEARNING

# WELCOME

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Dear Applicant

Thank you for your interest in joining the Chartered Institute for Securities & Investment (CISI) as our next Global Director of Learning. We are looking forward to receiving a diverse range of applications, reflecting current interest in, and the importance of, education and skills and the attainment of life-long professional standards for those working in the financial services sector.

After five years in post, our current Director, Susan Clements, will be retiring in the Autumn. We are therefore looking for a successor to lead the delivery of our highly-regarded Qualifications and Learning portfolio, which covers examinations and related professional development. Developing new content and new ways of learning through innovative 'bite-size' modules is one part of our learning and qualifications strategy, but we are also constantly developing new ways of delivering this learning. We are committed to our digitalisation agenda and we are proud of the development we have done for a new Learning Platform, which will mark a new era for delivery of Continued Professional Development for CISI members.

The CISI is an awarding organisation regulated by Ofqual, so the importance of updating and maintaining the integrity of our qualifications is paramount. The CISI must stay ahead of the curve in a rapidly evolving professional and industry context. In this lynchpin role, you will be our resident expert, internally and externally, on a broad range of qualifications and learning issues in a modern and changing world. As one of our corporate Directors, you will also be a driving force for development, working as part of a high calibre Executive Committee and leadership team charged with the day-to-day delivery and management of the CISI's portfolio and building our brand and reputation globally.



**Tracy Vegro, CEO**

The CISI champions diversity, integrity and, under our charitable objectives, acts as an authoritative voice to promote for the public benefit the advancement and dissemination of knowledge in the field of securities and investment. We are looking for an outstanding leader and authority in the field with superb influencing and interpersonal skills, and outstanding leadership to motivate and inspire an already strong team.

You will combine sharp instincts with sound judgement to identify appropriate new business opportunities and will be able to take your colleagues and stakeholders with you. With high credibility and undisputed integrity, you will quickly secure the confidence of our Board of Trustees, Committees, members and a variety external partners, underlining your profile as a true champion of our work to raise standards in the UK and globally.

If you believe you have the personal qualities, skills and experience we are looking for, we very much look forward to hearing from you.



**Michael Cole-Fontayn, Chair**

# ABOUT THE CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT

The Chartered Institute for Securities & Investment is the leading professional body for securities, investment, wealth, and financial planning professionals. Dedicated to professionalism since it emerged from the London Stock exchange in 1992, its purpose is to champion lifelong learning and integrity, raising individual standards of knowledge, skills and behaviour globally to enhance public trust and confidence in financial services.

We exist to set standards of professional excellence and integrity for securities, investment, wealth and financial planning professionals, providing qualifications and promoting the highest level of competence to our members, individuals and firms. As a charity with a royal charter, The CISI believes professionalism is the blend of three elements:

- Knowledge – gaining the initial competence to do your job through professional qualifications, developed by practitioners for practitioners.
- Skills – Continuing Professional Development (CPD) and ongoing learning which enables you to maintain competence through a professional body membership.
- Behaviour – upholding the highest standards of integrity by signing up to a professional body's code of conduct.

We believe a professional is someone who has a combination of knowledge and skills, and acts with integrity.

We currently have five strategic objectives which are guiding our work:

- Improve the value of our member offer with accessible, flexible and personalised qualifications and CPD, through the Learning Platform and other digital first initiatives.
- Evolve our operating model, develop our people and culture, reflecting a clear ESG strategy to ensure we have the capability and capacity to deliver value for all stakeholders.
- Invest in our digital resources to enable a relevant, customer focused digital strategy and service offering.
- Ensure regulatory compliance, adhering to requirements in all our activities. Maintaining engagement with regulators and other awarding organisations to ensure we are up to date with changes to policies.
- Collaborate and contribute to research and public debate on topics concerning the financial services sector.

## FIND OUT MORE

To read more please visit <https://www.cisi.org>



# ROLE PROFILE

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## ROLE TITLE

Global Director of Learning

## ACCOUNTABLE TO

Chief Executive

## ACCOUNTABLE FOR

Qualifications and Learning Resources teams (around 45 people).

## ROLE PURPOSE

To lead the development and delivery of products and services in the areas of Qualifications and Learning Resources to meet CISI's aims and objectives.

## KEY RESPONSIBILITIES

1. To develop and deliver the Institute's qualifications strategy and identify opportunities for the development of qualifications in line with the strategy.
2. To lead the development, delivery, and maintenance of the Institute's products and services in the areas of Qualifications and Learning Resources.
3. To be responsible for the development, co-ordination, and delivery of online learning resources and workbooks which met the Institute's objectives and are relevant to the Industry.
4. To ensure that the qualifications in all respects – syllabuses, question banks, exemplar papers, exam papers, delivery mechanisms, and awarding – comply with qualification regulators' conditions of recognition and best practice as indicated by the government and financial services regulators, and other external accreditation as appropriate.
5. To be/oversee the responsible officer for OFQUAL, Qualifications Wales, and CCEA purposes and to maintain accreditation.
6. To prepare and manage the budget for these areas.
7. To represent the Institute with relevant key stakeholders.
8. To attend and contribute to Board, Executive Team, and Executive Directors meetings.
9. In addition, employees are required to carry out any other duties as may reasonably be required.

*Job descriptions at CISI are flexible and in addition to these duties, you may be required to undertake additional duties and/or alternative work to meet the needs of the Institute.*

# PERSON SPECIFICATION

## PART ONE

### KNOWLEDGE AND EXPERIENCE

- Significant track record of success in the specialist areas of qualifications, learning resources, Continuing Professional Development (CPD), education and regulatory compliance.
- An understanding of working with Accredited Training Partners, employers, candidates, and other stakeholders, and the link to product development.
- Knowledge of the financial services sector / sufficient awareness and interest in developing depth of sector knowledge to fulfil the role.
- Strong senior experience of developing strategy, and leading implementation, and of driving continuous improvement across services and standards.
- Successful experience of engaging with multiple stakeholders; experience of working with Ofqual, or broader regulatory insights (eg FCA or CC), would be an asset.
- Understanding of digital learning challenges and the delivery of digital learning resources and assessments.
- An appreciation of the CISI's role as a Membership body.

## PART TWO

### SKILLS, ABILITIES AND PERSONAL BEHAVIOURS

- Able to work as part of a cohesive corporate leadership team.
- Empowering leadership style with the ability to manage a geographically dispersed team of around 45 in the UK and Sri Lanka.
- Highly effective communicator, able to influence others and form high value alliances with stakeholders at all levels.
- Sharp business development instincts and can identify potential new opportunities for CISI to expand services, products and reach globally.
- High intellectual capacity and comfortable with complexity.
- Organised and a strong problem-solver.
- Open-minded, sees the bigger picture and possibilities and can locate the institute's situation and potential within those.
- Professional, diplomatic style that garners trust and confidence, portrays high integrity, and demonstrated personal commitment to the achievement of CISI's objectives.



# TERMS OF APPOINTMENT

## REMUNERATION

Circa £130,000 per annum. More may be available for an exceptional candidate. Starting salary will be dependent on experience.

## CONTRACT

This role is offered on a full-time permanent basis.

## LOCATION

The role is based at CISI's offices at Fenchurch Street, London. Following successful completion of the probationary period, our expectation is that the postholder will be in the office for a minimum of three days per week.

## BENEFITS

CISI offers a wide range of benefits, and full details are available [here](#).

From day one we offer:

- life and income protection insurances (subject to the rules of the schemes), and
- 27 days annual leave, plus 3 days between Christmas and New Year, plus England bank holidays.

After probation period has been confirmed we offer:

- pension 7.5% employers and 1.5% employees via salary exchange
- travel and London office allowance – value £2,500 per annum, and
- Executive Medical.

After 12 months service we offer:

- private medical insurance cover, from the first of the following month, and
- private annual travel insurance, from the first of the following month.



# HOW TO APPLY AND TIMESCALES

We hope you will consider making an application to become our next Director of Learning. To make an application, please go to <https://starfishsearch.com/jobs/gdl-cisi/> and click on the apply now button, with the following prepared:

- a CV (no more than two sides)
- a covering letter explaining your personal motivation for applying to join CISI, and what you believe you can bring to the role as per the criteria set out in Part One of the person specification (no more than two sides)
- please tell us if there are any dates during the selection process (outlined below) when you would not be available to participate.

We would also be grateful if you would also complete the Equality and Diversity monitoring form on the online application process. This form is for monitoring purposes only and is not treated as part of your application.

The closing date is **Monday 17th July 2023**.

## SELECTION TIMETABLE

First stage discussions for selected applicants will take place throughout August 2023.

Agreement of the final shortlist, and candidate notification, will be by Monday 11th September 2023.

Final stage interviews for selected candidates will take place in w/c 11th September 2023.

