



## CANDIDATE PACK

# ASSISTANT DIRECTOR STRATEGIC PARTNERSHIPS AND MEMBERSHIP ENGAGEMENT

# WELCOME

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Dear Applicant

Thank you for your interest in joining the Chartered Institute for Securities & Investment (CISI) as Assistant Director, Strategic Partnerships and Membership Engagement. 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.

This new role at the heart of our Business Development directorate presents a fantastic opportunity to drive and build, on behalf of CISI, all our strategic partnerships around the world. These include relationships with government, regulation, and with distribution partners, other professional bodies, training partners and educational bodies.

We are looking forward to receiving a diverse range of applications, reflecting current interest in, and the importance of strategic partnership management in ensuring our work has real impact globally, now and in the future.

This role requires highly effective alliance and relationship building skills, along with a commercial mindset and an ability to think about opportunities across the breadth of our organisation. You will also demonstrate exceptional customer engagement skills, be a first-class negotiator, and have a robust track record of delivering tangible results.

You may come from an organisation within financial services, or from professional services or regulation. Wherever you are, you will possess drive and energy along with a real passion for getting things done. Your superb strategic influencing skills, strong interpersonal abilities and reputation for making it happen will mean you are our go-to person for all partnership related projects.

We at CISI must stay ahead of the curve in a rapidly evolving professional and industry context. This role presents an unrivalled opportunity for a true partnerships professional to cultivate and leverage the high quality alliances and trust we need in a modern and rapidly changing world and to underpin CISI's growth.



**Kevin Moore**  
**Director Global Business Development**



# 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 DESCRIPTION

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## JOB TITLE

Assistant Director, Strategic Partnerships and Membership Engagement

## REPORTS TO

Kevin Moore, Executive Director of Membership and Business Development

## DIRECT REPORTS

A small team

## ROLE PURPOSE

As a key member of the senior leadership team within CISI, this is an exciting opportunity to be part of fast-growing global organisation.

The role will be pivotal in shaping our strategic partnerships. It requires a commercial mindset, ability to think about opportunities across the breadth of the organisation and exceptional customer engagement skills. A proven track record of delivering tangible results is essential.

The successful candidate will be responsible for initiating, managing, and nurturing strategic partnerships globally with a wide range of bodies including government bodies, regulators, distribution partners, other professional bodies, training partners and educational bodies.

## MAIN RESPONSIBILITIES

### 1. STRATEGIC PARTNERSHIP MANAGEMENT:

- Identify, evaluate, and initiate strategic partnerships that align with the organisation's mission and objectives.
- Cultivate and nurture relationships with existing partners to maximise mutual benefits and drive long-term collaboration.
- Negotiate partnership agreements and contracts, ensuring favourable terms and outcomes for the organisation.

### 2. VISION AND STRATEGY:

- Contribute to the development and delivery of the organisation's strategic vision and goals.
- Translate strategic objectives into actionable plans and initiatives within the strategic partnerships.
- Conduct horizon scanning and monitor industry trends, market dynamics, and competitor activities to inform strategic decision-making.

### 3. LEADERSHIP AND COLLABORATION:

- Support CISI's values of innovation, customer service, inclusion and working as one team.
- Lead a high-performing team, providing guidance, mentorship, and support to achieve departmental and CISI objectives.
- Collaborate effectively with internal and external stakeholders.
- Represent CISI at conferences, seminars, and networking events to raise awareness, establish partnerships, and promote the CISI's work.

# PERSON SPECIFICATION

## PART ONE

### KNOWLEDGE AND EXPERIENCE

- Substantial experience of strategic partnership management or business development (direct experience gained within a membership organisation would be an asset).
- Track record of success in driving results, achieving targets, and exceeding expectations.
- Strong experience of managing and nurturing a broad range of business-critical partnerships and alliances simultaneously and during periods of sector change.
- Strong experience of leading, managing and developing high-performing teams.
- Experience of working within the financial services sector, underpinned by a thorough understanding of the current landscape and future trends, will be a significant advantage.

## PART TWO

### SKILLS, ABILITIES AND PERSONAL BEHAVIOURS

- Sharp commercial acumen with the ability to identify and capitalise on business opportunities.
- Able to work as part of a cohesive corporate leadership team.
- Excellent communication and interpersonal skills with the ability to build relationships with stakeholders at various levels.
- Professional, diplomatic style that garners trust and confidence, portrays high integrity, and demonstrates personal commitment to the achievement of CISI's objectives.
- Ability to plan and manage complex projects and relationships working collaboratively across a variety of internal and external stakeholders
- A strategic thinker with the ability to translate vision into actionable plans, comfortable with complexity.
- Able to prioritise tasks and deliver to tight deadlines while demonstrating excellent decision-making and judgement.



# TERMS OF APPOINTMENT

## REMUNERATION

This role offers a competitive remuneration package, which includes a basic salary of circa £90,000 per annum. In addition, benefits offered by CISI include:

- 7½% company pension contribution into a personal pension, in addition to your own contribution of 1½% via salary exchange
- Life insurance and income protection insurance
- A Wellness Allowance of up to £30 a month
- A travel allowance of £2,500 per annum after passing probation

## LOCATION

This role is based in the City of London and a hybrid working arrangement is possible, after probation.

## ANNUAL LEAVE

29 days leave per annum (which includes the institute closing for three days between Christmas and New Year).

## CANDIDATE ADJUSTMENTS

At CISI we encourage applications from a neurodiverse workforce so please reach out to [Szymon.Podgorski@starfishsearch.co.uk](mailto:Szymon.Podgorski@starfishsearch.co.uk) to discuss reasonable adjustments if required.

CISI's London office is open plan with agile desk booking; however, we are able to arrange reasonable adjustments for candidates that require a fixed working space.

*We value the contribution that employees with different views and experience bring to the Institute and are committed to promoting equality, inclusion and diversity. We hope to receive applications from a wide range of talented people irrespective of their race, religion or belief, gender, age, gender identity, neurodiversity, disability, sexual orientation, ethnic origin, political belief, social class, relationship status or caring responsibilities.*



# HOW TO APPLY

We hope you will consider making an application to become our Assistant Director Strategic Partnerships and Membership Engagement. To make an application, please go to <https://starfishsearch.com/jobs/cisi-ad-spme/> and click on the apply now button, with the following prepared:

- Your CV (no more than three sides).
- A supporting statement (no more than two sides) that sets out why you think this role is the right move for you and how you meet the knowledge and experience criteria.

We would also be grateful if you would 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.

**Closing date is Friday 26th July 2024**

## RECRUITMENT TIMESCALES

Closing date:	Friday 26th July 2024
Preliminary interviews:	w/c 12th August 2024
Final Panel interviews:	w/c 26th August 2024

