**ROLE DESCRIPTION  
EDUCATION SECRETARY/OFFICER (CPD)**

Every local institute must elect an education secretary/officer to manage its CPD programme at its Annual General Meeting to hold office for the ensuing twelve months.

All local institutes provide relevant CPD activity to members through a programme of lectures which is organised by the Education Secretary, as well as offering advice to those making enquiries about CII qualifications, potential paths of study and post qualification activities. It is also important to ensure that your council are kept up to date with developments to qualifications, as these may influence the focus or topics of future CPD programmes.

Remember, the role of the local institute is primarily to adopt the objectives of the CII, as defined in its Charter and Bye-laws, for the benefit of your local members, prospective members, students and the local insurance and financial services community.

Consequently, the education secretary/officer should develop a close working relationship with the CII at Aldermanbury and also with the Regional Membership Manager for the region.

**Main responsibilities**

The role will involve, but may not be limited to the following:

* Agreeing the number of lectures to host for the year's programme and confirming the dates.

* Agreeing the CPD programme budget to be adhered to, unless council otherwise agree.
* Sourcing and confirming suitable venues and audio visual equipment which meet the requirements of the Health and Safety policy and CII's CPD Accreditation requirements.
* Identifying and, in conjunction with the president and council, agreeing suitable topics for lectures and sourcing suitable speakers.
* Liaising with the venue and speaker in advance of an event to ensure all prepared (including room layout, presentation, refreshments, payment).
* Ensure that feedback forms are printed, handed out, filled in, collected and then analysed with the results shared with council.
* Advising council on developments to examinations and qualifications.
* Answering ad hoc queries from members or council on potential paths of study and directing them to the appropriate person for further information.

**Additional notes**

1. The role of education secretary will normally be undertaken for a term of one year although the constitution of the local institute allows for a longer period.
2. All CPD lectures need to be advertised, this may be your responsibility or be that of another council member. Advertising CPD lectures by email, website or post to the members must include the following information:
   * Event title
   * Venue - full name and address including postcode
   * Start time, finish time
   * Cost
   * How to book
   * Target audience
   * Event overview between 50 and 150 words
   * Learning objectives which are usually 3-6 bullet points which complete the sentence 'by the end of this lecture, delegates will be able to identify:'
   * Speaker profile of maximum 100 words
   * Details of any refreshments
   * Request for dietary or access requirements.