Training Relationship Coordinator Job Description

Philanthropy Impact (www.philanthropy-impact.org) is a charitable organisation whose mission is to increase philanthropic giving and social investment and to encourage impact/ESG investment. We work with professional advisors to (U) HNWI (ultra-high net worth and high net worth individuals) to grow and enhance the quality of the support they give to their clients, the UK's wealthiest individuals, around philanthropy and social impact investment.

We are a membership organisation for private client advisors, wealth management, private banking, independent financial advice, tax and legal sectors; as well as individual philanthropists and social investors, trusts and foundations, charities and social enterprises. Our network is extensive and is represented by respected leaders in the philanthropy, social investment and impacting investing space.

We act as a knowledge hub and centre of excellence offering:

- Knowledge and resources covering best practice philanthropy, social investment and impact/ESG investment
- Learning event, seminars and specialised training
- Voluntary standards
- Networking
- Reports and analysis
- Advocacy, campaigning and government liaison

The Training Relationship Coordinator's purpose is to support the achievement of Philanthropy Impact's vision to increase philanthropy, social investment and impact/ESG investment – more and better. This post is a vital role for Philanthropy Impact in our move towards being a self-sustaining social enterprise and the post holder will have the opportunity to grow the role with the development of the training programme.

Our advisor training programme is a core pillar designed to enable us to achieve our mission. The Training Relationship Coordinator is responsible for successful relationship development, implementation of the business strategy and income growth specific to our advisor training programme. This position is responsible to the Director, Membership and Development, working in close collaboration with other members of the team enabling cohesive relationship management across our work streams, and will feed into the overarching communications and marketing strategy.

The Training Relationship Coordinator is responsible for preparing professional advisors to meet their changing client needs, including supporting:

- Marketing and sales related to the advisor training courses and activities with a focus on identifying and generating new business.
- The development and evaluation of the training programme, its curriculum, content; training delivery; recruitment and training of trainers; keeping the handbook to support professional

advisors up to date; long term support of delegates and roll out a comprehensive training course aimed at professional advisors across the UK and other countries.

Some national and international travel will be necessary as well as evening work when the organisation runs events and other activities. Current home working due to Pandemic with a return to an office environment when possible. Flexible working is available within the constraints of the delivery of the training.

Duties and Responsibilities:

1. This position is responsible for supporting the development and implemention of an effective strategy for delivering specialised training courses for professional advisors; and for the marketing and sales of the training programmes to professional advisors and to professional advisory firms including planning, designing the marketing materials and the use of social media.
2. This includes working closely with the Communication and Events Manager to develop and maintaining targeted marketing and communications strategies (including social media) for raising general awareness for the organisation across the professional advisory services market; and, from time to time, determine market conditions, conduct and evaluate research, implement and adjust marketing plan elements as needed.
3. The Training Relationship Coordinator will also contribute to advertising and promotional activities including advertising and sponsorship sales.
4. They will also attend conferences and seminars to increase understanding of training and support the development and maintainance of relationships with professional trade associations, networks and other relevant institutions and organisations.
5. More specifically, responsibilites include:
    a. Targeted marketing and sales of the training programme to professional advisors and to professional advisory firms; including identifying leads, creating engagement plans, planning and designing the marketing materials and the use of social media, and recruiting sponsors for training programme in close collaboration with team.
    b. Manage the day-to-day development and delivery of the training programme, including acting as a central point of contact for all things training related and coordinating the programme dates.
    c. Oversee the trainers to deliver the 'live online' components.
    d. Oversee the delivery of the self-study online components.
    e. Monitor candidate attendance and use of online course materials.
    f. Be the main point of contact for training candidates.
    g. Oversee the development and renewal of course content.
    h. Client relations/management, including creating bespoke training opportunities to meet Philanthropy Impact client and member needs.
    i. Managing the delivery of the professional advisor training.
    j. Responsible for reporting and impact evaluation for the training programme and adjusting as appropriate.
    k. Supporting the recruitment and training trainers to expand the programme.
    l. Overseeing the budget and operations related to training.
6. Develop strategic partnerships that help promote the organisation and its vision/mission as well as helping with revenue generation.
7. Working with Philanthropy Impact staff, Board Committees and Board as appropriate.
8. Additional duties assigned from time to time.

Person Specification:

- Appropriate educational qualifications or equivalent experiential knowledge and learning.
- Previous experience in delivering training programmes, events or other complex logistical projects.
- Demonstrable experience and skills in long-term relationship management.
- Ability to support the development and implementation of organisational strategy, adjusting as necessary and delivering results, reporting and evaluation of impact.
- Strong communications skills and attention to detail with an intuitive ability to meet stakeholder needs.
- Experience in communications including social media/digital technology, preferably the use of LinkedIn to network.
- Demonstrable ability and willingness to work independently to tight deadlines, travel as required, manage own time and prioritise effectively whilst also working as part of a team.
- Sound IT skills (Microsoft Office), including use of technology for communication with a dispersed team and an understanding of online content development and delivery.
- Experienced in using a cloud based CRM tool (Beacon or equivalent provider) to manage relationships, budgets and planning.
- Minimum of 3 years' experience of direct-marketing and sales (desirable).
- Knowledge of the UK and European philanthropy and social investment and of the advisory sectors (desirable).
- A passion for inspiring philanthropy, social investment and impact/ESG investment to create a better society for all.

Salary £25,000 – £28,000 depending on experience.