



## Accreditation Programme:

### Accreditation and Training Manager Job Description

Philanthropy Impact ([www.philanthropy-impact.org](http://www.philanthropy-impact.org)) is a charitable organisation whose mission is to increase philanthropic giving and social investment and to encourage impact 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.

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

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

The Accreditation and Training Manager's purpose is to support the achievement of Philanthropy Impact's vision to increase philanthropy and social investment – more and better.

The Accreditation and Training Manager is responsible for the successful development, implementation, and growth of the accreditation programme and the ongoing implementation and growth of our advisor training programme. This position is responsible to the Chief Executive, working in close collaboration with the Director of Membership and Development and Communications and Event manager to feed into the overarching business development strategy and maintain holistic relationship management through member and stakeholder's journeys and for their firms.

The Manager is responsible for providing the training opportunities for professional advisors to meet their changing client needs and to provide continual professional development, including:

- Overseeing the continued development and launch of our accreditation programme, including detailed curriculum development, development of course tools and materials (including for online delivery), identification of a bank of tutors and assessors, rolling out and overseeing delivery of the accreditation programme.
- Further developing and testing the training programme, its curriculum, content; training delivery; marketing and sales; recruitment and training of trainers; keeping the handbook to support professional advisors up to date; and roll out a comprehensive training course aimed at professional advisors across the UK and other countries.
- Marketing and sales related to the accreditation programme and our other advisor training courses and activities.

Some national and international travel will be necessary as well as evening work when the organisation runs events and other activities.

**Duties and Responsibilities:**

1. This position is directly responsible for developing and implementing an effective strategy for delivering the accreditation programme and specialised training courses for advisors; working closely with the Director of Membership and Development to create a marketing and sales strategy, with a focus on the accreditation and training programmes as part of membership for advisors and firms including, client focus relationship management and tracking, prospecting and networking, designing marketing materials and the use of social media.
2. This includes working closely with the Administration, Communication and Events Officer developing and maintaining 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 Accreditation and Training Manager, working in close collaboration with the Philanthropy Impact team, will also oversee advertising and promotional activities for the accreditation programme and for training including advertising and sponsorship sales.
4. Where appropriate and in close coordination team members, they will also attend conferences and seminars to increase understanding of accreditation and training and initiate, develop and maintain relationships with professional trade associations, networks and other relevant institutions and organisations.
5. They will liaise closely with the Director of Membership and Development to promote continual professional development of member firms, promote membership to training delegates and to create a prospect pool of new leads in firms and individual advisors.
6. More specifically, responsibilities include:
  - a. Manage the day-to-day development and delivery of the accreditation programme, including acting as a central point of contact for all things accreditation and training related.
  - b. Oversee the trainers to deliver the 'live online' components.
  - c. Oversee the delivery of the self-study online components.
  - d. Liaise with the Accreditation Panels as required.
  - e. Monitor candidate attendance and use of online course materials.
  - f. Be the main point of contact for accreditation candidates.
  - g. Oversee the development and renewal of course content.
  - h. Liaise with the British Accreditation Council (BAC) for initial course accreditation and ongoing reviews of the accreditation programme.
  - i. Marketing and sales of the accreditation and training programme to professional advisors and to professional advisory firms; including planning, designing the marketing materials and the use of social media, and recruiting sponsors for training events and programme.
  - j. Client relations/management, including creating bespoke accreditation and training opportunities and creating and maintaining a sales prospect pool of new firms and advisors to engage with Philanthropy Impact to meet Philanthropy Impact's client and member existing and emerging needs.
  - k. Managing the delivery of the accreditation programme and professional advisor training.
  - l. Creating and maintaining a sales prospect pool of new firms to engage with Philanthropy Impact to meet their existing and emerging client needs.

- m. Responsible for reporting and impact evaluation for the accreditation and training programme and adjusting as appropriate.
  - n. Recruiting and training trainers to expand the programme.
  - o. Overseeing the budget and operations related to accreditation and training.
- 7. Develop strategic partnerships that help promote the organisation and its vision/mission as well as helping with revenue generation.
- 8. Working with Philanthropy Impact staff, Board Committees and Board as appropriate.
- 9. Additional duties assigned from time to time.