

Training Co-ordinator, Membership and Enterprises

Reporting to: Head of Training and Events

Salary: £35,000-40,000 depending on experience

Date: August 2024

The Investment Association

“At the IA, we are committed to serving our members, embracing new ideas and striving for excellence. We are inclusive, considerate and act with integrity in all we do.”

We are the trade body and industry voice for UK investment managers. We champion the investment management industry.

The UK investment management industry plays a major role in the economy, helping millions of individuals and families achieve their life goals by helping grow their investments (mainly through workplace pensions). In fact, 75% of UK households use an investment manager’s services (knowingly or unknowingly). The industry also invests, billions of pounds in companies and the financing of transport networks, hospitals, schools, and housing projects. The industry supports 126,400 jobs in the UK, including 13,800 in Scotland. It’s the largest industry of its kind in Europe, and the second largest in the world, after America.

Our members range from small, independent UK investment firms to Europe-wide and global players. Collectively, they manage over £9.1 trillion of assets on behalf of their clients in the UK and around the world. That is over 11% of the £81 trillion global assets under management. We act as their voice and represent their interests to policymakers and regulators and help explain to the wider world what the industry does. We help our member firms become better businesses.

We want our members to achieve the best results for their customers, both in the UK and internationally. To do this, we lead learning, training, and development initiatives to ensure compliance with the law and industry best practice – all while attracting a more diverse workforce into the industry. We also consult widely with members on issues affecting the industry, such as market trends, new technology, and data use.

About the Membership & Enterprise (M&E) Team

The Membership & Enterprise team is a combination of the Membership, Events and Training divisions. As the commercial arm of the Investment Association, we work closely with our members and affiliated firms to develop programmes and offerings which support the dynamic needs of our sector.

We focus on retention and growth of the IA membership by working with all internal and external stakeholders supporting on regulatory, policy, compliance, governance, and operational matters.

The Investment Association

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Overview of the Role

Reporting to the Head of Events and Training, the Training Co-ordinator will assist in the delivery of the training course portfolio for the Investment Association (IA), its members, associates, and other key stakeholders such as regulators and policymakers.

The aim is to raise industry standards of professional development through an evolving CPD programme, including both virtual and classroom-based courses and workshops, in-house training, and e-Learning. Our portfolio of training products and services serves to offer necessary regulatory and compliance-based training content for employees throughout the investment management eco system, at any stage of their career, from new recruits into the industry through to Board Members and CEO's.

The right person will either have some experience of working in a Learning and Development function, or experience within an administrative function looking for their first role in Learning & Development.

Main duties in this role include:

- Manage the full training life-cycle delivery, from the scheduling of the courses, setting up the training room on delivery day, to requesting delegate feedback post course
- Support and facilitate the smooth delivery of training sessions, including introducing the session and running through any 'Health and safety' and 'Housekeeping'
- Assist members with ad hoc training queries for both open courses and in-house
- Manage the relationship with professional third-party training providers and other stakeholders
- Manage and respond to queries through the shared IA Training and IA Enterprise inboxes
- Create accurate dashboards and reports (delegate lists, marketing success, weekly booking reports including revenues)
- Work with IA teams to assist in the creation of marketing materials, content on the IA website and associated social media
- Frequently review and maintain accurate training materials, such as new content from training providers and/or new images for the marketing
- Update our IA Learning platform, ensuring content is accurate and banners are changed to promote relevant upcoming events/training
- Support other Membership and Enterprise team activities when required

Skills and experience:

- Attention to detail is essential
- Plan and prioritise important tasks and work to deadlines with accuracy
- Ability to write well, with excellent spelling and grammar
- Articulate ideas well, with confidence to engage with others
- Able to build and maintain strong working relationships with stakeholders
- A desire to learn from others
- Comfortable working with data and reporting, previous system (HR or LMS) use would be beneficial
- Problem solving skills
- Creative and forward thinking with a 'can do' mindset
- Innovative, willing to suggest improvements to processes
- The ability to work collaboratively within a small team and to contribute to the wider work of the Investment Association

We welcome applications from all qualified candidates regardless of their ethnicity, race, gender, religious beliefs, sexual orientation, age, marital status or whether or not they have a disability.