DEFINING OUR PURPOSE

Role Title:  Senior Relationship Development Officer – Global

Reports to:  Head of Relationship Development

Mission:
To deliver our global engagement strategy, actively building and managing new and existing business relationships with ICAEW, international firms and businesses and other global business and city networks. Delivering opportunities to connect and support past and present ICAEW members, ACA students and their families across the globe.

What is the job’s core purpose?

Manage existing and develop new relationships with key stakeholders with international firms, businesses, business networks and city groups through our strategic partnership with ICAEW in order to deliver against our strategy.

Gather intelligence to improve our understanding of the needs amongst ICAEW Global members, whilst being aware of sensitive and cultural differences.

Interpret data packs from each country in order to provide an effective wrap around service.

Ensure effective and efficient delivery against the Relationship Development – Global engagement operational plan, ensuring it is aligned to our strategic priorities.

Identify and ensure delivery of opportunities that increase the depth of understanding and raise credibility with past and present ICAEW members, staff, ACA students and their families across all our global channels.

Develop and ensure delivery of a consistent yet bespoke, creative offering across all global platforms to maximise our potential reach and credibility.

Work collaboratively with other channels to ensure consistent working and processes; ensuring best practice is embedded across all departmental processes with the end user’s journey in mind.

Develop and implement effective relationship development reporting, monitoring and evaluation across all activities.

Be an advocate for continuous improvement within the organisation.

Own and lead on ad-hoc key strategic projects, as assigned by the Head of Relationship Development.
What constitutes success in this role?

A strategically co-ordinated approach to our global activity, based on information gathered independently and through relationships nurtured with key stakeholders.

Increased engagement with key stakeholders to increase their understanding of how CABA can support past and present ICAEW members, staff, ACA students and their families across the globe.

Increased number of global events and initiatives attended in partnership with ICAEW and independently, enabling us to engage with more ICAEW members, staff, ACA students and their families.

Increased awareness and understanding from our target audiences with evidence from our beneficiaries that they know what we do and how relevant our offer is to their particular life stage.

An increase in enquiries from ICAEW members living outside the UK.

Increased ROI through all our global activities.

All activities delivered in a timely fashion to a professional standard with a strong call to action.

Improved cross team and departmental collaboration to increase the consistency across all our developing channels.

Effective reporting mechanisms in place, highlighting all opportunities created and subsequent measures of success, reporting regularly to the SMT and Board.

What improvements in performance and productivity are intended by this?

To increase and strengthen our strategic relationships with international firms, businesses, business networks and city groups.

An improved partnership with ICAEW global team; offering a mutually beneficial and consistent offering that meets our charitable objectives.

More individuals are aware of CABA and how we can support them and their families throughout their lives.

Demonstrable, ROI on all delivered activities.

What are the implications of not having the role filled?

Being seen as a UK based organisation, for UK members only.

The number of global ICAEW members helped would decrease as would the number of global visitors to our website.

Less effective engagement with key stakeholders, resulting in fewer opportunities to engage with past and present ICAEW member, staff and their families outside of the UK.
A lack of deeper understanding with our key stakeholders, resulting in misunderstandings and miscommunication around the services and support we offer outside the UK.

New opportunities for engagement not identified or progressed allowing other providers to engage with the chartered accountancy community in areas where we could support.

Key stakeholders seeing CABA as a benevolent organisation for those in financial distress only.
### Outcomes
What this person needs to accomplish in their role in order of importance and how this will be measured. *(Note that most roles at whatever level should have between 3 – 8 outcomes)*

<table>
<thead>
<tr>
<th>Key outcomes for the role</th>
<th>Measures</th>
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</table>
| To strengthen our strategic partnership with ICAEW in order to gain access to the maximum number of ICAEW members during the membership and employment cycle and beyond who live outside the UK | ✓ Increased number of global ICAEW members who actively engage with CABA which can be measured and where impact can be evidenced  
✓ Increased number of global ICAEW members who actively engage with CABA through our online engagement tools and platforms  
✓ Continued presence in global ICAEW communications to member groups  
✓ Continued presence at relevant ICAEW global events and local activities  
✓ Increased number of enquiries received through ICAEW global engagement activities  
✓ Maintaining an equal partnership with ICAEW where we are seen as a credible provider and resource for their members |
| To strengthen our existing strategic partnerships with international firms, develop new relationships with additional firms, businesses, city groups and other business networks, as defined | ✓ Continue nurturing relationships with key stakeholders in line with our long-term strategy  
✓ Develop new contacts to build our credibility and extend our reach in line with our long-term strategy  
✓ Increased number of global ICAEW members who actively engage with CABA which can be measured and where impact can be evidenced  
✓ Increased number of global ICAEW members who actively engage with CABA through our online engagement tools and platforms, evidenced through these channels  
✓ Presence at relevant global events and local activities, evidenced through these channels  
✓ Increased number of enquiries received through global engagement activities  
✓ Develop an equal partnership with all channels worked with to ensure we are seen and treated as a credible partner of choice and not a service provider or sponsor  
✓ Evidence of delivering creative and credible sessions to raise awareness of the services and support offered through joint global objectives and agreed measures |
| Effective delivery of the Relationship Development annual operational business plans | ✓ Plans delivered within agreed timeframes and budget  
✓ Increased engagement opportunities delivered |
Builds and supports an effective team of Global champions that enables us to have an ‘on the ground presence’ in key countries identified

- Increased ROI on all delivered activities
- Increased access and use of our services, reviewed quarterly

- Positive feedback from overseas interactions
- Increased enquiries from overseas members
- Increased opted ins from overseas members

Work effectively and collaboratively with internal colleagues to drive forward new ideas

- Internal buy-in achieved
- Embedded "best-practice" partnership development practice within CABA

Skills
Define the context of the skills and how they will be used

E – Essential:  A - Advantageous

<table>
<thead>
<tr>
<th>Skills Required</th>
<th>How they will be used</th>
<th>E /A</th>
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<tbody>
<tr>
<td>Job knowledge and Experience</td>
<td>Experience of working in the not for profit or charity sector/professional bodies</td>
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<td>Educated to degree level</td>
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<td></td>
<td>Knowledge of wellbeing issues</td>
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<td>Supervisory skills</td>
<td>Experience of supervising staff</td>
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<td></td>
<td>Ability to manage staff’s day to day work flow</td>
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<td></td>
<td>Experience of managing a volunteer’s program</td>
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<td></td>
<td>Excellent planning and project management skills</td>
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<td>Experience of working towards an agreed strategy, involving others in the team and</td>
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<td></td>
<td>across the organisation</td>
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<td>Ability to identify and prioritise streams of work and assign accordingly</td>
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<td>IT and technical skills</td>
<td>Proficient in Microsoft Outlook, Word, Excel and PowerPoint</td>
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<td>Good working knowledge of CRM systems</td>
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<td>Proven ability to export and manipulate data for reporting purposes</td>
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<td>Proven ability to work with relevant department to ensure reporting mechanisms are</td>
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<td></td>
<td>fit for purpose</td>
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<td>Communications skills</td>
<td>Confident and professional communication skills; able to communicate at all levels</td>
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<td>with internal and external stakeholders in person, by telephone and in writing</td>
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<td></td>
<td>Excellent standard of English with good written and verbal communication skills</td>
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<td>Meticulous and methodical, with strong attention to detail</td>
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<td>Confident to present to Stakeholder groups with clear messaging</td>
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**Stakeholder engagement**
- Experience of developing and managing strategic relationships at early stages
- Demonstrable, excellent stakeholder management skills

**Numeracy**
- Ability to scope out, plan and deliver projects/events to budget
- Experience of owning and managing own budget
- Ability to manipulate data for reporting purposes, providing comparisons from previous reporting periods

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**Competencies/Talents/Behaviours**

The way in which someone does something and why they do it that way. This is important when matching to the skills above and for cultural fit.

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<thead>
<tr>
<th>Competencies/Behaviours / Talents</th>
<th>How these will be demonstrated</th>
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<tr>
<td><strong>Passion</strong></td>
<td>Proactive, positive and enthusiastic individual who shows clear commitment to the role</td>
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<td>Has a good work ethic</td>
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<td>Committed to personal development</td>
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<td>Driven, with a clear sense of personal accountability</td>
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<td>Ambitious, innovative, self-motivated and goal oriented</td>
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<td><strong>Integrity</strong></td>
<td>Demonstrates confidentiality, professionalism, compassion, trust, honesty</td>
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<td>A clear understanding of right and wrong, always taking an ethical approach</td>
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<td>Leads by example, living the CABA values</td>
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<td><strong>Respect</strong></td>
<td>Respects colleagues opinions and attempts to integrate these into working practices</td>
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<td>Gives and receives feedback objectively</td>
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<td>Operates excellent customer service skills</td>
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<td><strong>Teamwork</strong></td>
<td>A project owner that is effective in collaborating with other internal and external functions to achieve our charitable objectives</td>
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<td>Team orientated and focused on joint goals not just individual success</td>
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<td>Works effectively within a team, with an ability to build cross departmental relationships</td>
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<td><strong>Flexibility and adaptability</strong></td>
<td>Influences and negotiates at an appropriate level</td>
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<td>Enjoys generating and responding to ideas and opportunity</td>
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<td>Responsive, able to explore and deliver new ideas and projects within tight deadlines</td>
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<td>Works on a variety of tasks simultaneously</td>
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- Demonstrates an ability to work flexibly and autonomously to achieve success
- Willing to travel within the UK to attend stakeholder meetings and to represent CABA at events. There is the potential for occasional evenings and weekend work
- Willing to travel overseas (not extensively; it is anticipated to be three – five times a year) to attend stakeholder meetings and to represent CABA at events and meetings.

Judgement and Decision Making
- Comfortable working to agreed objectives
- Ability to make decisions within defined procedures and use initiative
- Ability to prioritise work and competing demands
- Identifies innovative and creative solutions to problems
- Ability to research, monitor, analyse and interpret trends
- Ability to gather intel

Interpersonal Skills
- Strong interpersonal and relationship building skills with the ability to network, motivate and inspire individuals at all levels
- Competent presenter with the ability to network at all levels
- Self-motivated, proactive, with commitment to working as part of a team

Inspirational
- Inspires, influences and persuades others in all externally facing interactions

Commitment
- Positive, can-do attitude
- Committed to own personal development
- Good attendance and timekeeping
- Ability to demonstrate and implement CABA values across all working

CABA values

**Passion:** We are passionate about improving the wellbeing of Chartered Accountants and actively seek creative and innovative solutions.

**Integrity:** We act in a professional confidential manner at all times, being open, honest and trustworthy.

**Respect:** We respect the organisation and the roles, values and opinions of each other and treat our stakeholders with dignity and compassion.

**Teamwork:** We work together for the good of the Chartered Accountant Community and CABA, taking responsibility for our own actions and challenging each other in an empowering and supportive way.