Job Posting: Events & Programming Coordinator

CFA Society New York (CFA NY) has been a leading forum for the investment community since 1937. The mission is to serve all members and investment professionals’ needs and educate the investing public. We provide the premier forum for exchanging information among investment professionals, corporate management, and other interested members and strive to maintain an active leadership development program, career assistance, and continuing education. We encourage the pursuit of high standards of ethics and professional conduct and promote integrity and professionalism. Today, with a community of more than 12,000 members, CFA NY is the largest of the 150+ societies that comprise CFA Institute worldwide.

CFA NY has planned for 76 events in 2022, with a similar number of events anticipated in 2023. 50% of our 2022 events have been successfully completed to date. We are moving towards a hybrid model with both in-person and virtual events. These events anchor the Society’s engagement with our members and constituents in the investment management community.

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This role is responsible for liaising with volunteer organizers to coordinate and implement all logistics for the Society’s events and group meetings, overseeing multiple events and projects simultaneously. This position will report directly to the Director, Content & Strategic Relations and will also work closely with all departments of the CFA Society New York team.

The successful candidate must have a demonstrated ability and passion for planning and managing events that provide high value to attendees.

## **Accountabilities and Expectations:**

1. Oversee all aspects of planning, management and follow-up for assigned CFA Society New York events.
   * The Coordinator is accountable for the quality planning and execution of Society events. This includes timely and complete pre-event planning; ensuring that the events themselves run smoothly and successfully; and event follow-up activities are completed in a timely and high-quality manner.
   * The Coordinator is expected to work proactively with event organizers, and to provide the volunteer leaders positive and consistent support for their events. The Coordinator is further expected to provide high-quality customer service to event guests.
2. Coordinate and support Society Interest Group meetings.
   * The Coordinator is accountable for managing logistics for Interest Group meetings, and for supporting Interest Group leaders in planning and management of these meetings.
   * The Coordinator is expected to act as the primary client service representative to Interest Group leaders. The Coordinator is further expected to share learnings and needs from Interest Group meetings with Society leadership, and to help identify opportunities for improvement in the Society’s events and programs based on these insights.
3. Work collaboratively across all departments within the Society.
   * The Coordinator is accountable for collaborating with other departments within the Society to ensure that events are meetings are promoted effectively, and to optimize event registrations in support of Society budget goals.
   * The Coordinator is expected to work with other teams within the Society to ensure that events and programming integrate effectively with other Society offerings to provide value to members and constituents.

## **Essential Functions:**

* Work with all departments including Programming/Events, Membership, Marketing, Media, and Finance to provide excellent customer service to members and event registrants.
* Manage logistics for interest group meetings including registration, communication with registrants and virtual/onsite meeting coverage when necessary (most meetings are in the evenings, so occasional late-night coverage will be required).
* Support event organizers in the logistics of volunteer driven events.
* Work collaboratively with key departments (Marketing, Media, Finance) on the creation, marketing and implementation of events.
* Oversee all pre-event responsibilities including but not limited to:
  + coordinating logistics with the event organizers
  + liaising with speakers on speaker deliverables, pre-event meetings and day-of logistics
  + communicating event details with marketing team for event page creation and marketing efforts
  + creating event registration page and event management through Cvent
* Assist with virtual and onsite event logistics including but not limited to:
  + creating the run of show
  + managing registration lists
  + creating badges and signage
  + coordinating A/V support and room set-up
  + event check-in and day-of event support
* Compile, manage and circulate conference documents including program agendas, participation agreements, post-event reports and attendee surveys.
* Respond to calls and emails regarding programming and assist with event registration and other guest needs.
* Serve as the client service representative for interest group activities, including group meetings and events.
* Schedule, track, and communicate the group meeting and events calendar to staff and members.
* Maintain and update shared forms and files in a timely and consistent manner.
* Travel up to 15% may be required for this position.
* This position description should not be construed to contain every function/responsibility that may be required to be performed by an incumbent in this job. Incumbents are required to perform other functions as assigned. This position description may be updated as needed to reflect changes to accountabilities, expectations, essential functions and required experience or attributes.

## **Candidate Experience and Attributes:**

* One to two+ years’ experience in planning and managing successful business events. Must have strong event and project management skills.
* High School degree required; preferred Associates degree or higher.
* Self-accountable and self-motivated with the ability to work collaboratively across multiple teams.
* Superior customer service and interpersonal skills.
* Must be extremely proactive and reliable.
* Outstanding oral and written communication skills. Must possess excellent email etiquette.
* Must possess extraordinary attention to detail with the ability to work on several projects simultaneously and deadline driven.
* Ability to work flexible hours including long shifts, early mornings, evenings, and overtime as necessary.
* Must thrive in a fast-paced environment with the ability to meet multiple tight deadlines.
* Microsoft Office proficient; knowledge of and Cvent and Salesforce a plus.

**Physical Requirements:**

The physical demands described herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Requests for reasonable accommodations will be considered where an accommodation would enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is frequently required to: sit, walk, occasionally required to reach with hands and arms, continually required to talk or hear, occasionally required to bend, lift, or climb, frequently required to lift and carry light weights (25-50 pounds).

**Additional Requirements:**

This position is subject to CFA NY’s policy of requiring proof of Covid-19 vaccination among its employees; applicants who are unable to be vaccinated due to a medical or religious reason may request an exemption from the vaccination policy, which will be considered on a case-by-case basis. Position will be attending onsite and offsite events with travel as needed.

If you are interested in applying but do not come from the non-profit events space, please include a summary of your experience in other areas that might position you for success to be considered for this position.

**Compensation:**

* Base Salary Range $55K-$58K
* Performance bonus potential
* Excellent benefits package including medical, dental, and vision; 401k plan; and 4 weeks PTO

**Please submit a cover letter, resume / CV, LinkedIn profile link, writing sample and compensation expectations to: jobresumes@cfany.org and reference the job title in the subject line.**

CFANY is an equal opportunity employer. All qualified applicants are considered for positions without regard to race, color, religion, sex, national origin, age, physical or mental disability, genetic information, sexual orientation, gender identity or expression, veteran or uniformed service member status, or any other category protected by applicable federal, state, or local laws.

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This position description in no way states or implies that these are the only duties to be performed by the employee occupying this position. Employees will be required to perform any additional tasks or other job-related duties as requested by their supervisor. This document does not create an employment contract, implied or otherwise, other than an ‘at-will’ relationship.

To apply, please send a cover letter, resume / CV, LinkedIn profile link to: [jobresumes@cfany.org](mailto:jobresumes@cfany.org)