**Member and Volunteer Engagement Manager**

**Job Summary:**

The Member and Volunteer Engagement Manager is a relationship management, mission critical and revenue building role. The Member and Volunteer Engagement Manager is a key member of CFA Society New York’s team and will serve as a main point of contact for members and volunteers. This role oversees and facilitates group meetings in addition to helping to curate and manage Society events.

The successful candidate will elevate the overall volunteer experience. The Society places a strong value on providing an exceptional volunteer experience and it is the job of the Member and Volunteer Engagement Manager to ensure that we support our volunteers with a high degree of excellence. We want our volunteers and members to have pride in their association with the CFA Society New York and to be actively engaged.

**Job Responsibilities**

* Collaborate with members and volunteers to initiate programming efforts
* Demonstrate positive leadership abilities to work together with staff to plan, direct and execute all programming efforts
* Understand the importance of member’s, leader’s organizer’s and attendee’s time through delivery of high quality and proactive service
* Manage a comprehensive range of annual events and activities that advance the mission of the CFA Society New York
* Facilitate the work of volunteers involved in the event planning process (i.e., committee chairs, vice chairs, actively involved members) to reach appropriate goals
* Support volunteer engagement and member outreach by directly participating in phone, email and in-person cultivation and solicitation
* Facilitate and attend interest group meetings and events
* Be a solution provider for scheduled meetings
* Participate in planning meetings, accept special assignments, assist colleagues and provide support for all ongoing programs and operations as needed
* Document, analyze, track and report the outcome of each key interaction with constituents
* Produce post event analyses/after action reports
* Participate in other departmental initiatives as required

**Skills & Requirements:**

* The successful candidate must be knowledgeable in the financial industry and be a reliable resource of relevant industry information and trends
* Display a passion for CFA Society New York and the future of the financial industry
* Nonprofit and volunteer experience is a plus
* Ability to attract and maintain a dynamic group of volunteer leaders
* Strategic thinker and organized task master
* Self-starter who is energetic and able to manage multiple priorities
* Excellent written, oral and interpersonal skills
* Discretion and ability to interact with high profile members, attendees, speakers
* Ability to prioritize and effectively manage multiple projects
* Experience in volunteer engagement or relationship management
* Team Oriented and ability to work with various levels of management and staff
* Demonstrated proficiency with Microsoft Office programs and relationship management tools
* Familiarity with Association Anywhere, Salesforce, iMIS, SharePoint, Freedcamp, River or Slack, is a plus
* Financial industry experience is a plus
* Experience in event planning desirable but not mandatory
* 3-5 years of experience in a similar role

**Education:**

* Bachelor's degree required

**About CFA Society New York:**

CFA Society New York has been a leading forum for the investment community since 1937, founded by Benjamin Graham, the “father of securities analysis” and one of the most influential people in the history of finance. Today, with over 10,000 members, CFA Society New York is the largest of the 142+ societies that comprise CFA Institute worldwide. Through generations of investment professionals, CFA Society New York remains steady as a leading forum for the investment community since 1937.