

Position Specification

# **Global Risk Institute in Financial Services**

**Manager, Member Services**

March 2021

## POSITION SPECIFICATION

<b>Position</b>	Manager, Member Services
<b>Company</b>	Global Risk Institute in Financial Services
<b>Location</b>	55 University Avenue, Suite 1801 Toronto, Ontario M5J 2H7
<b>Reporting Relationship</b>	Chief Operating Officer
<b>For more information</b>	info@globalriskinstitute.org

### COMPANY BACKGROUND/CULTURE

The Global Risk Institute (GRI) is a premier organization that defines thought leadership in risk management for the financial industry. GRI brings together leaders from industry, academia, and government to draw actionable insights on risks globally.

The organization was founded in 2010 as a result of efforts by the financial industry, the Bank of Canada and the provincial and federal governments to build capacity to manage and prevent risks within Canada's financial institutions and to build a global profile for the industry. There were 16 founding financial institutions, with the Governments of Canada, Ontario, TD Bank Group and Manulife Financial acting as core sponsors.

Through engagement activities with its member institutions, GRI builds integrated risk management capacity for private and public sector professionals. It also acts as a hub, stimulating evidence-based debate among regulators, practitioners and academics engaged in risk. GRI's objectives are to:

- Build risk management capacity in the financial services industry
- Leverage our convening capability to foster effective conversations among the public and private financial sectors
- Deepen and broaden our collective understanding of financial industry risks through research, education, and events
- Continue to expand our financial industry membership reach and engagement, while building our brand in risk management

GRI has become the leading forum for ideas, engagement and emerging trends in risk management in the financial services sector and is well positioned for the future. Through ongoing growth in its partnerships, membership and programming, GRI continues to build strong connections, provide critical research, education and events for risk leaders globally.

## KEY RESPONSIBILITIES

GRI is a member services organization. Key to its success is a member relations strategy that will ensure:

1. Satisfaction of GRI's existing members at the most senior levels (i.e. C-suite, Board);
2. Target and develop new members

In consultation with the President and CEO and COO, the Manager, Member Services is primarily responsible for creating and implementing a plan for the recruitment of new members and the retention of current members. The Manager, Member Services must identify and evaluate the changing needs of members and work with the senior leadership team to evolve the member programs, such as education and events, to support these needs.

The Manager, Member Services will report to the Chief Operating Officer.

### Specific responsibilities include:

- Lead the development of member relations plan by reviewing the GRI business and strategic plan, and discussions with GRI's CEO and Senior Management Team
- Through on ongoing dialogue, ensure that this plan remains current in light of events and changing circumstances within the financial service sector
- Coordinate and drive the pipeline, and help achieve the targets for potential new members
- Build, maintain, and enhance relationships with members and stakeholders (i.e. financial services executives, government officials, etc.) to understand their needs and opportunities
- Lead a members survey process to assess that GRI members are satisfied with GRI programs and communications. Identifying needs, address requests and concerns, and proactively communicating with members
- Working with Senior Leadership team, build marketing collaterals to highlight GRI's value proposition to current and prospective members
- Be the owner/overseer of the master contact list for GRI members, working with the communications team to ensure that mailing and event invitation lists are maintained.
- Working with the Events and Education Director, determine the target invitation list for events, ensure that member attendance is monitored and that proper coverage is achieved.
- Working with the Communications and Marketing Director, ensure that the communications strategy supports the retention of members and attraction of prospective members.
- Work with the Communications and Marketing team to prepare quarterly and annual member engagement reports

### 1<sup>st</sup> year key success factors

1. Develop the member relations plan, execute the agreed to activities with the CEO and COO
2. Coordinate and execute the method which will be used to keep and maintain member contact information
3. Develop and execute the member acquisition plan
4. Develop the action plan from the Members Satisfaction Survey

### PROFESSIONAL EXPERIENCE/QUALIFICATIONS

Success in the role of Manager, Member Services will require:

- A strong communicator with the ability to clearly, logically, convincingly, diplomatically, and effectively express himself/herself, both verbally and in writing
- Proven relationship building skills and the ability to deal credibly with senior business leaders
- Multi-purpose writing and strong presentation skills
- Ability to exercise sound judgment in highly complex situations, build consensus around competing priorities
- Strong team player
- Experience working in a Member Relations function, Communications and/or Public Affairs function in the financial services industry with a clear track record of success
- Experience at the management level in a dynamic organization, including specific involvement in strategic planning processes and activities
- Knowledge of relevant public sector institutions, public policy-making processes, and risk management would be an asset

### EDUCATION

Bachelor's degree and at least 5 - 10 years of Business Experience in the Financial Sector.

### COMPENSATION

A competitive compensation package.