Professional Development Meeting Program Manager
Job Description

The Financial Planning Association® (FPA®) is the principal professional organization for CERTIFIED FINANCIAL PLANNER™ (CFP®) professionals, educators, financial services providers and students who seek advancement in a growing, dynamic profession. Our focus on quality professional development for our members is one of the reasons that FPA is an indispensable force in the careers of today’s CFPs.

The Professional Development Meeting Program Manager is key to designing, managing and executing four or more high-quality national meetings and events for FPA per year, including the Business and Education Annual Conference, Retreat Conference, NexGen Gathering meeting and Chapter Leaders Conference. This role is responsible for collaborating and leading staff and volunteers from site selection, program inception to completion, developing and managing the goals and objectives of the program, driving efficiencies, monitoring cost controls and keeping within budget. The Meeting Program Manager will work closely with the Director of Professional Development to define and execute a long-term strategy for FPA’s national events and meetings aligned with FPA’s strategic direction and business plan.

Key duties and responsibilities include the following:

- Consult with advisory groups, stakeholders, and subject-matter experts to determine the needs, scope, content and design of our national events that will best serve FPA members
- Establish goals and objectives; develop them, agenda and program component recommendations, in conjunction with other staff and the volunteer task force, to support the goals and objectives.
- Provide creativity and participant history feedback to all program elements.
- Coordinate SOW, convention center and hotel contract negotiation, prepare meeting specifications details and other paperwork including program change documents. Develop, manage and maintain budgets for each program from inception through post-event.
- Build and maintain relationships with FPA staff, volunteers and all vendors. Develop and manage timelines of each program to meet planning deadlines.
• Communicate all logistical details and changes with internal staff and all vendors, when applicable.
• Supervise production of printed materials and mailings.
• Manage the profitability of the program. Develop new business whenever possible.
• Project manage and create internal planning processes and timelines including post event reconciliation.
• Hold post-event debrief meetings and maintain a list for improvements for future programs and strategic planning.

Requirements and attributes include:
• Excellent project management skills with ability to multi-task extensively in a fast paced environment.
• At least 5 years of event management experience, significant destination knowledge beneficial.
• Excellent communication skills, with an ability to tailor messages, understand the perspectives of others, share information readily, and the ability to listen as well as give feedback in a respectful and diplomatic way.
• Ability to work closely with staff and volunteer members with a focus on driving collaboration and operational efficiency.
• Ability to make quick judgment decision utilizing program knowledge and experience.
• Utilize strong organizational and time management skills.
• Willingness to travel as needed.
• Willingness to locate in Denver is required.