

Senior Manager, Operations

Do you enjoy working in a highly professional environment where you can play a pivotal role in bringing together industry executives on common issues, who are dedicated to delivering meaningful choice to their consumers? Have you been searching for an opportunity to grow your career in a high impact industry with a motivating leadership team, dedicated to fostering your professional progress and success?

CAFII is the exciting intersection of high level executives in the Finance and Insurance industries, with government officials and regulating bodies. CAFII's intimate team works in a fully remote environment between in-person events.

CAFII is a not-for-profit industry Association celebrating over 25 years as a key stakeholder in Canada's life and health insurance sector. We bring together tremendous competitors and find common ground.

Our mission is to deliver a united voice for financial institutions involved in selling insurance through a variety of distribution channels. CAFII believes that consumers are best served when they have meaningful choice in the purchase of insurance products and services. Our members offer credit protection, travel, life, health, and property and casualty insurance across Canada through client contact centres, agents and brokers, travel agents, direct mail, branches of financial institutions, and the internet. CAFII's members are Canada's leading banks, credit unions, and insurers.

Reporting to the Executive Director, CAFII is seeking a Senior Manager, Operations to collaborate with the Executive Director and lead the Association's key operational and process matters.

Location and Nature of Position

As is the case for all CAFII team members, the Senior Manager, Operations will work almost exclusively from their home office. CAFII has always endorsed a remote work model. The Senior Manager, Operations position is a full-time, 35 hours per week role.

Key Responsibilities and Accountabilities

The incumbent will be responsible to ensure vigilant leadership to best manage the Association's affairs.

Reporting to the Executive Director, the Senior Manager, Operations will have the following responsibilities and accountabilities:

Operations, Processes, and Project Management

- Assess current state and develop and deploy required policies and processes with the goal of regrouping under a Policies & Procedures manual the details on all processes, outputs, projects, and initiatives. Ensure enforcement, and regular audit;
- Ensure compliance of all relevant rules and regulations for CAFII Policies and Procedures;
- Provide continuous leadership in streamlining processes, seek efficiencies and cost effectiveness for CAFII, its administration and operations;

- Assist with review and negotiation of new contracts and renewals with suppliers and vendors while fostering strong relationships;
- Give direction to our 3rd party vendor regarding the ongoing development and enhancement of the back-end member portal (the “intranet”);
- Organize and execute electronic voting of the Board as required;
- Review, assess and optimize CAFII’s annual Operating Budget as per Executive Director and board direction on identified focusses; managing monthly financial statement and forecast-to-fiscal-year-end updates to the EOC and Board; and managing the annual audited financial statements process and related relationship with external auditor;
- Managing the annual commercial insurance renewal process, including reviewing and assessing costs, and recommendations to the Executive Director for go to market;
- Administration of the annual Member and Associate dues invoicing and collection process;
- Oversight of CAFII’s electronic accounts payable process, in conjunction with the Association’s Controller/Accountant;
- Onboarding new EOC, Board, and Committee members, including setting up one-hour meetings to brief new members on CAFII, and working with our partner Managing Matters to keep CAFII’s orientation package up to date, including identifying and implementing the most efficient way of maintaining an up-to-date orientation package for new members; and
- Collaborate with Executive Director to organize and execute Executive Operations Committee (EOC) meetings and sub-committee meetings, Board of Directors meetings, and the Annual Meeting of Members (AGM), including the preparation of agendas and minutes, preparing related material, and tracking action items;
- Plan a diversity of Association’s events by allocating and managing budgets and managing efforts of our 3rd party provider and the Event Coordinator to ensure Board, Associate and Member satisfaction.

Events

- Plan, and execute post-Board meeting Reception Events;
- Oversight and delivery of the Annual Members and Associates Luncheon;
- Oversight and delivery of the EOC Annual Appreciation Dinner;
- As per general directives, execute annual tour schedule, travel and accommodations for CAFII team to connect with insurance regulators and policymakers in person (typically one per year to either Western Canada (four provinces); or Atlantic Canada (four provinces));
- Responsible for organizing and producing side bar meetings with regulators and policymakers in conjunction with the annual CLHIA Consumer and Complaints Conference, (usually held in May in a major Canadian city);
- Develop and deliver the Annual Liaison Lunch and Industry Issues Dialogue with Autorité des marchés financiers staff executives in Quebec (Montreal or Quebec City), followed by an immediately ensuing CAFII Board meeting;
- Coordinate in-person, virtual, or hybrid meetings with executives from the Financial Services Regulatory Authority of Ontario (FSRA), other provincial/territorial insurance regulators and policy-makers, the Canadian Council of Insurance Regulators (CCIR), the Canadian Insurance Services Regulatory Organisations (CISRO), the Financial Consumer Agency of Canada (FCAC), the Office of the Superintendent of Financial Institutions (OSFI), or from allied industry Associations, as requested by the Executive Director;

- Assist in the planning/organization of six to eight CAFII webinars per year; and
- Other Operations, Events, and Association Governance duties, as may be assigned by the Executive Director from time-to-time.

Key Skills, Experience, and Attributes

- 8-10 years' experience with growing responsibilities in the Associations sector, business, or government, with a focus on operations, process, project management, and events;
- Strong project management skills;
- Demonstrated business acumen;
- Self-starter with demonstrated abilities to focus on multiple, often concurrent, events and processes;
- Thrives in a fast-paced and complex environment combined with a wide span and variety of responsibilities;
- Quick study for new concepts and grasping the vernacular and subtleties of life and health insurance;
- Fluent bilingualism (English and French) is a valuable asset.

Travel

This position will entail occasional travel within Canada, and the need to travel to downtown Toronto offices of CAFII member companies and other industry organizations a few times per month.

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