CFA Institute

# APPENDIX 2: SOCIETY ROLES

## (FROM THE SOCIETY OPERATING MODEL)

We anticipate that most Impact Funding approvals will align with activities that "Fewer" societies would be able to execute. Note that the examples listed for "Most" societies typically align with "business-as-usual" activities that would generally be funded through Operational Funding or other operating revenue.

Most Societies ↓ Few Societies

| Strategy | Shape the Future of the Industry and the Profession | | | Build a Diverse Portfolio of Learning Products | | Modernize and Grow the CFA Program | | | Develop Exceptional Customer Experiences | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Value Drivers** | Localized Efforts, Direct Input, Co-Creation, Delivery Channel | | | Direct Input, Co-Creation, Delivery Channel, Demand Generation | | Demand Generation, Delivery Channel, Localized Support | | | Localized Support & Delivery Channel | | |
| | Advocacy | Research | Standards | Creation | Distribution | CFA Program | IR/Employers | Universities | Employers | Candidates | Members & Volunteers |
| | **Promote CFA Institute policy advocacy positions** to members, institutions, regulators<br><br>**Introductions** to and engagement with regulators and policymakers<br><br>**Drive policy** by responding to regulatory consultation papers | **Promote CFA Institute's research** and thought leadership<br><br>**Contribute local insights** into CFA Institute's research and thought leadership<br><br>**Convene local Influencers** on key themes<br><br>**Author** original research or localize CFA Institute research | **Promote awareness** of standards among membership<br><br>**Promote adoption of our industry standards** by engaging directly with regulators, firms, and industry representatives<br><br>**Drive input from members and local thought leaders** into new standards development | **Deliver educational programming and CE** opportunities to members<br><br>**Deliver local Professional Learning** content and programs<br><br>**Collaborate across network** on programming<br><br>**Contribute content** to CFA Institute PL portfolio<br><br>**Localize** CFA Institute products for local relevance<br><br>**Gain volunteer expertise** into learning and research | **Represent and promote** CFA Institute learning products to members and institutions<br><br>**Drive demand** amongst local constituents and employers<br><br>**Package and share quality learning content** with network and/or CFA Institute<br><br>Deliver **Ethics Training** | **Support Local Candidates** with exam prep, study groups, mentorship<br><br>**Participate in Demand Generation** campaigns<br><br>**Build local brand awareness**<br><br>Contribute to **Practice Analysis** | **Initiate local employer and university relations** and host CFA Program information sessions<br><br>**Partner with Institutional Relations** on local B2B strategy<br><br>**Directly promote and distribute** products<br><br>Establish and support **ambassador programs or networks** | **Promote** Scholarship Programs to grow awareness and demand<br><br>**Host & Onboard Universities** to the Research Challenge<br><br>**Host/Deliver** Ethics Challenge<br><br>**Build relationships** with prestigious universities and academics | **Initiate and maintain** local employer relationships, including sponsorship opportunities<br><br>**Identify employer needs:** products, professional learning, research, ethics & standards<br><br>Promote the **Career Center** | **Recognize new Charterholders**<br><br>**Provide networking and career services** to candidates<br><br>**Localize and amplify CFA Institute messaging** (e.g. Candidate Exam Comms)<br><br>**Assist with local candidate inquiries**<br><br>**Provide Prep Services**<br><br>**Invite candidates into membership** (local or Affiliate) | **Grow membership** through Recruitment and Renewal Campaigns<br><br>**Deliver networking opportunities**<br><br>**Engage, manage, and recognize** volunteers and committees<br><br>**Measure engagement** and solicit member sentiment and actionable feedback<br><br>**Create contribution opportunities** for members and volunteers |