

### POSITION DESCRIPTION

<b>NAME</b>	[Employee Name]	<b>DEPARTMENT:</b>	Administration
<b>TITLE</b>	Event Coordinator	<b>STATUS:</b>	Full-Time
<b>REPORTS TO:</b>	President, Retirement Plans	<b>CLASSIFICATION</b>	Exempt

**JOB SUMMARY/ORGANIZATIONAL IMPACT:** The Event Coordinator (“EC”) reports directly to the President, Retirement Plans, and will have the responsibility of managing events for the organization. The EC oversees all aspects of event planning, including internal and external events. Key responsibilities for this position include meeting with vendors, scouting and booking locations, food, entertainment, staff and cleanup.

**RESPONSIBILITIES/ ESSENTIAL FUNCTIONS:**

- Event planning for company seminars including but not limited to researching of vendors and venues, obtaining and comparing costs, and keeping records of all expenses and communication.
- Understand parameters laid out for each event while asking questions when needed. Obtain information regarding how many guests are attending event and prepare and execute a detailed outline of the event needs.
- Work with team to plan event themes, presenters, sponsors, and setup style.
- Work closely with the Marketing Department regarding events, social media, and internal and external advertisement and communication.
- Assist in the utilization of Summit’s CRM (Client Relationship Manager) system to send out invitations, event information, and follow-up regarding sent information accordingly.
- Coordinate with catering company regarding needs for event including but not limited to confirming order was received, arranging a time for arrival or pick-up, and obtaining receipts for cost reconciliation.
- Work with outside vendors on an on-going basis to ensure all details are adhered to.
- Manage and oversee events on the day of, including problem-solving, welcoming guests, directing event set-up, communicating with staff, organizing vendors, and managing set up and take-down.
- Follow-up with guests after event if any materials or presentations were requested.
- File and maintain electronic records in CRM relating to event planning efforts and costs.
- Recognize areas of weakness, provide suggestions, and update documentation for process improvement.
- Perform general and administrative duties as assigned.

## REQUIRED QUALIFICATIONS

<p><b>Knowledge</b></p> <ul style="list-style-type: none"> <li>• <b>Administration and Management.</b> Knowledge of business and management principles involved in strategic planning, resource allocation, human resources modeling, leadership technique, production methods, and coordination of people and resources.</li> <li>• <b>Customer and Personal Service.</b> Knowledge of principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.</li> <li>• <b>Clerical.</b> Knowledge of administrative and clerical procedures and systems such as word processing, managing files and records, stenography and transcription, designing forms, and other office procedures and terminology.</li> </ul> <p><b>Skills</b></p> <ul style="list-style-type: none"> <li>• <b>Active Listening.</b> Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.</li> <li>• <b>Creativity and Innovation.</b> Develops new insights, questions conventional approaches, and provides alternative solutions and approaches to problems.</li> <li>• <b>Speaking.</b> Talking to others to convey information effectively.</li> <li>• <b>Service Orientation.</b> Actively looking for ways to help people</li> <li>• <b>Critical Thinking.</b> Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.</li> <li>• <b>Flexibility.</b> Ability to adapt to new information and embrace changing conditions and unexpected obstacles.</li> <li>• <b>Organization.</b> Balancing multiple tasks with different deadlines.</li> </ul>	<p><b>Abilities</b></p> <ul style="list-style-type: none"> <li>• <b>Oral Expression.</b> The ability to communicate information and ideas in speaking so others will understand.</li> <li>• <b>Judgment and Decision Making.</b> The ability to use ethical principles and sound judgment when faced with making difficult decisions.</li> <li>• <b>Team Player.</b> The ability to work cooperatively and effectively in a team environment to accomplish group goals.</li> <li>• <b>Speech Clarity.</b> The ability to speak clearly so others can understand you.</li> <li>• <b>Problem Sensitivity.</b> The ability to tell when something is wrong or is likely to go wrong. It does not involve solving the problem, only recognizing there is a problem.</li> <li>• <b>Written Expression.</b> The ability to communicate information and ideas in writing so others will understand.</li> </ul> <p><b>Experience:</b></p> <ul style="list-style-type: none"> <li>• 2 years of work-related experience preferred</li> <li>• Experience using Microsoft Office Suite; Experience using Microsoft Office 365; Outlook, OneDrive, SharePoint, and Dynamics preferred.</li> </ul> <p><b>Education Required:</b></p> <ul style="list-style-type: none"> <li>• Bachelor's degree in Marketing or Hospitality Management preferred.</li> </ul> <p><b>Certifications/Licenses:</b></p>
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### **AUTHORITY**

This position does not have the authority; neither express nor implied, to legally bind the Company to any contract without documented consent of an Officer of the Company.

### **SPECIAL JOB DIMENSIONS:**

Position must be willing to travel on occasion for seminars and internal or external events.

### **ATTENDANCE:**

Employee must have the ability to comply with the company's attendance policy documented in the Employee Manual.

### **PHYSICAL REQUIREMENTS AND WORK ENVIRONMENT**

While performing the duties of this job, the employee is regularly required to sit for long periods of time and must have the dexterity of hands and fingers to operate a computer keyboard, mouse, and other office equipment. The employee must have visual acuity to read and draft reports, memos, letters, etc. Specific vision abilities required by this job include vision adequate for the incumbent to perform the responsibilities and functions of the job efficiently. Must be able to hear, speak and communicate clearly.

The employee will work in smoke-free office surrounding; noise level is quiet to moderate.

The qualifications, physical demands and work environment described herein are representative of those an employee will encounter and must meet to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The requirements listed in this document are the minimum levels of knowledge, skills and abilities.

***This document does not create an employment contract, implied or otherwise, other than an "at will" relationship.***