

Draft Classification Standards – Rev. 3/29/2024
Events and Conference Planner Series

Class Title	Class Code	Issue Date	FLSA
<i>Events and Conference Planner I</i>	XXXX	XXXX	<i>Non-Exempt</i>
<i>Events and Conference Planner II</i>	XXXX	XXXX	<i>Exempt*</i>
<i>Events and Conference Planner III</i>	XXXX	XXXX	<i>Exempt*</i>

OVERVIEW:

Positions classified within the Events and Conference Planner series are directly responsible for executing the planning and management of events and conferences. They coordinate with internal and external stakeholders to plan, organize, schedule, and execute event details including location scouting and booking, speaker identification and management, invitations/registration, catering, entertainment, technology, equipment, staffing, and other relevant activities.

Positions are assigned to classifications within the series based on the scope and complexity of events and conference planning and management activities; degree of independence and judgement; experience, knowledge, skill, and ability required; degree of planning, analysis, and execution required by the position; impact and risk to the university; and nature of supervision received.

Positions perform tasks that may include, but are not limited to, planning, coordinating, publicizing, and implementing special events, including social events, employee recognition celebrations, conferences, and meetings. Higher levels within the series build upon and include the knowledge and skill requirements and work assignments of lower levels.

Events and Conference Planner I – Entry-level professional who applies basic professional concepts to resolve problems of limited technical scope and complexity. Normally operates under detailed guidelines and standard processes; analytical work may be reviewed for accuracy. Assignments may be routine in nature and involve performing various duties related to planning, coordinating, and executing of events and conferences. Follows standard practices and procedures. Resolves less complex problems and situations where answers can be derived from policy or collection of data. Routinely interacts with vendors or stakeholders to plan and execute events.

Events and Conference Planner II – Professional who applies acquired job skills and knowledge of events planning and management best practices, policies, and procedures to complete significant assignments. Fully manages less complex events by completing non-routine tasks of moderate technical scope. Draws from prior experience and knowledge of event planning techniques and concepts to exercise judgment while planning and managing event components and logistics including venue selection, catering, vendor management, and event promotion. Provides input for new event or conference program ideas. Works with stakeholders to ensure proper implementation of events and programs by providing significant guidance and instruction.

* This classification as outlined in this document meets the duties test of the Administrative Exemption. An employee's actual exemption status may differ based on salary rate and actual duties performed.

Events and Conference Planner III – Professional who applies advanced job skills, in-depth organizational and stakeholder acumen, and project management to complete substantive assignments, complex and/or large events or programs, and related work of significant scope and complexity. Exercises advanced discernment and in-depth knowledge of event and conference planning and management to determine appropriate action. May require the development of new approaches, techniques, and innovation to address issues. Utilizes persuasion when working with vendors and stakeholders to ensure proper event or conference implementation.

TYPICAL PROGRAMS, ACTIVITIES, AND CORE FUNCTIONS/DISCIPLINES (May include but are not limited to):

- **Event Planning and Coordination** – Plans and coordinates events and conferences, including logistics, facilities, equipment, scheduling, event components and speakers, and vendor management. Collaborates with event stakeholders to determine event objectives, themes, and target audiences. Develops event timelines, budgets, and work plans to ensure successful execution.
- **Vendor and Stakeholder Management** – Identifies, selects, and manages vendors and suppliers, assists with facilitating contracts and ensures excellent customer service and professionalism. Fosters positive relationships with vendors, sponsors, and partners by anticipating and resolving issues/needs to enhance event experiences and ensure seamless event operations. Liaise with internal and external stakeholders, including campus departments, faculty, staff, students, and community partners, to coordinate event details and requirements.
- **Registration and Event Management** – Develops and implements event registration processes including online registration systems. Manages attendee databases and provides timely and accurate event-related information to participants. Coordinates speaker and attendee logistics, including accommodations, transportation, and special requirements. Provides on-site coordination during events, ensuring a positive experience for attendees and addressing any issues or concerns.
- **Marketing and Promotion** – Develops and implements event marketing and promotion strategies. Coordinates the creation and distribution of event materials such as, invitations, programs, and directional signage. Collaborates with marketing and communications teams to promote event through various communications channels. Monitors and analyzes marketing/promotion metrics to evaluate the effectiveness of marketing efforts.
- **Budget and Financial** – Manages event budgets, in compliance with financial guidelines and objectives. Tracks event expenses, processes invoices, and reconciles financial records. Provides regular budget updates. Identifies cost-saving opportunities and/or negotiates favorable pricing with vendors and suppliers.
- **Event Evaluation and Reporting** – Conduct post-event evaluations, gathering feedback from attendees, stakeholders, and staff. Analyzes feedback, event data and metrics to assess event success and identify areas for improvement. Prepare post-event reports. Makes recommendations for enhancements and adjustments to future events based on evaluation findings.

EVENTS AND CONFERENCE PLANNER I

Under direct supervision, performs entry-level professional duties utilizing basic concepts and practices within the event planning and management field. May assist more advanced event and conference professionals. Performs less complex assignments by independently following established procedures and protocols. Analytical and professional work is reviewed for understanding of professional concepts and following policies and procedures.

Work assignments typically include some or all of the following:

- ◆ Prepares and coordinates the distribution of event and promotional materials (programs, signage, invitations, communications, feedback surveys and promotion). Includes use of various communication channels, such as websites, social media, and email campaigns. May create straight forward communications.
- ◆ Prepares/completes appropriate paperwork (invoices, work orders, and requisitions).
- ◆ Gathers and analyzes data to support the development and management of budgets; selection of vendors or venues; development of complex schedules, and related event planning.
- ◆ Utilizes and maintains event management databases and scheduling systems.
- ◆ Follows established guidelines, policies, and practices to respond to questions and determine actions.
- ◆ Coordinates event staffing, equipment, and facilities. Includes managing setup and tear-down and other logistical components such as vendor management, security, and parking.
- ◆ Provides work direction to volunteers, student employees, and team members.
- ◆ Consults with more senior events and conference professionals to respond to complex or more difficult questions and situations.
- ◆ Develops comprehensive knowledge and understanding of the standard practices and terminology of events and conference management including any related policies.

MINIMUM QUALIFICATIONS:

Knowledge and Skill:

- ◆ General professional knowledge of events and conference planning and management.
- ◆ Demonstrated communication and interpersonal skills to collaborate effectively with internal and external stakeholders and event attendees.
- ◆ Skill in following guidelines and providing input and feedback as required and applicable.
- ◆ Ability to work both independently as well as part of a team, with a customer and stakeholder service-oriented approach.
- ◆ Flexibility to adapt to changing priorities and deadlines.
- ◆ Analytical and math skills to complete research and coordinate and reconcile financial accounts.
- ◆ Organizational skills to plan, organize, and prioritize work.
- ◆ Computer skills to appropriately use technology and relevant software packages as required.

Experience and Education:

Equivalent to a bachelor's degree in a related field. Relevant education and/or experience which demonstrates acquired and successfully applied knowledge and abilities shown above may be substituted for the required education on a year-for-year basis.

EVENTS AND CONFERENCE PLANNER II

Under general supervision, administers events and conference programs and policies. Responsibilities cover all aspects of event planning and execution. Work is reviewed for soundness to ensure the successful execution of events and conferences. Applies professional level knowledge of subject, which may include knowledge of a specialty area. Decision-making requires interpretation and knowledge of event planning best practices and procedures; event program or contract guidelines; and organization policies and protocols. Evaluates and recommends policy and practice changes. Works independently on most day-to-day assignments with general supervision on new assignments or projects to ensure alignment with objectives. Handles multiple work priorities and is accountable for own work results.

In addition to duties performed by the Events and Conference Planner I, the Events and Conference Planner II typically performs the following duties:

- ◆ Manages less complex events with full accountability for results or manages components of complex events and conference programs. Less complex events are often relatively straightforward in terms of planning, execution, and follow-through than their more complex event counterparts.
- ◆ Interprets regulations, guidelines, and program details for multiple events and conferences.
- ◆ Creates detailed event plans and schedules.
- ◆ Determines or recommends venues and vendors.
- ◆ Oversees event logistics.
- ◆ Creates correspondence and promotional materials such as invitations, thank you notes, printed programs, and post-event analysis reports.
- ◆ Provides lead work direction, and trains volunteers, student employees, and less experienced staff.
- ◆ Manages relationships with external stakeholders such as clients, project sponsors, vendors, and internal departments such as security and parking.
- ◆ Completes event related budgets and accounts reconciliation.
- ◆ Recommends improvements in processes, designs, procedures, and planning.
- ◆ Consults with more advanced events and conference professionals to respond to highly unusual or complex situations.

MINIMUM QUALIFICATIONS:

In addition to Events and Conference Planner I knowledge and skill requirements, work assignments typically require:

- ◆ Working knowledge and understanding of event and conference planning and management principles and current best practices.
- ◆ Demonstrates competence in independently applying judgment to resolve non-standard problems and issues. Includes interpretation of applicable regulations, standards, and guidelines.

- ◆ Strong analytical and organizational skills to plan, organize, prioritize, and manage the successful completion of events/conferences within time and budget constraints.
- ◆ Strong communication and interpersonal skills to effectively manage multiple stakeholder relationships and guide the development of appropriate communication and promotional materials.
- ◆ Ability to effectively lead and train other professionals, less experienced staff, student employees, and volunteers.
- ◆ Knowledge of procurement, budgeting and accounting principles and processes.
- ◆ Proficiency in using event planning software and financial systems.

Experience and Education:

Bachelor's degree in a related field and two years of relevant experience. Additional experience which demonstrates acquired and successfully applied knowledge and abilities shown above may be substituted for the required education on a year-for-year basis. An advanced degree in a related field may be substituted for the required experience on a year-for-year basis.

EVENTS AND CONFERENCE PLANNER III

Working independently under general supervision, performs advanced events and conference planning while managing and exercising authority over large and/or complex events and conferences. Demonstrates advanced discernment in determining appropriate plans and methods to achieve event and/or conference goals and while ensuring compliance with laws, regulations and organizational policies. In collaboration with management, assesses, formulates, and evaluates programs, policies, and procedures. Decision-making is based on event planning best practices; substantial event planning experience; advanced knowledge of relevant federal, state, and local regulations; event program or contract guidelines; and university policies and protocols. Work is performed with minimal oversight focused on ensuring alignment with overall objectives. Handles multiple work priorities and may provide lead work direction with accountability for results.

In addition to duties performed by the Events and Conference Planner II, the Events and Conference Planner III typically performs the following duties:

- ◆ Develops, implements, and manages large and/or complex events and conference programs. More complex events are typically not routine in nature, may be located in a large venue, and require coordination between multiple stakeholders including, but not limited to, campus security, facilities services, internal and external vendors, and food services. These events typically demand a high level of oversight to ensure success.
- ◆ Utilizes specialized in-depth expertise to coordinate and administer unique events requiring the development of new methodologies and processes.
- ◆ Performs a broad spectrum of work that includes the ability to identify and align program details to strategic goals or priorities.
- ◆ Creates and adjusts methodologies to meet changing policies and organizational focus areas.
- ◆ In collaboration with management, develops new and recommends improvements to event and conference program management policies, processes, and procedures.
- ◆ Develops and monitors complex budgets and performance metrics.
- ◆ Assists with facilitating contracts for conferences and events with significant financial and reputational impact.

- ◆ Provides lead work direction and mentoring to volunteers, student employees, staff, and vendors and is accountable for work results to ensure objectives and goals are achieved.

MINIMUM QUALIFICATIONS:

In addition to Events and Conference Planner II knowledge and skill requirements, work assignments typically require:

- ◆ Advanced knowledge and understanding of event and conference planning and management principles, concepts, and best practices.
- ◆ Demonstrates competence in independently applying advanced judgment to resolve difficult and complex problems and issues.
- ◆ Advanced analytical and organizational skills to organize, prioritize and manage the successful completion of large or complex events/conferences within budget constraints.
- ◆ Advanced communication and interpersonal skills, including political acumen to build partnerships and communicate effectively across a large array of stakeholders. Ability to effectively present ideas and successfully facilitate contract agreements.
- ◆ Ability to effectively lead, train, and mentor the work of others.
- ◆ Advanced knowledge of event planning and management current best practices,
- ◆ Advanced skill to appropriately use technology and relevant event planning and management tools.

Experience and Education:

Equivalent to a bachelor's degree in a related area and four years of relevant experience. Additional experience which demonstrates acquired and successfully applied knowledge and abilities shown above may be substituted for the required education on a year-for-year basis. An advanced degree in a related field may be substituted on a year-for-year basis.