



MILWAUKEE
JEWISH FEDERATION

EVENT PLANNER JOB DESCRIPTION

Position Summary/Objective

The Event Planner will be responsible for planning, supervising, attending and reporting for events, luncheons and meetings – primarily, but not limited to the Financial Resource Development department.

Essential Functions:

- Coordinate and plan meetings, events, luncheons and parlor meetings – approximately 20-30 total per year with a high level of excellence and professionalism.
 - Participate on event committees with staff and volunteers.
 - Coordinate facilities reservations, caterers, other vendors, equipment and physical setup, and all other event details.
 - Assist lead staff in developing programming.
 - Work with the marketing department to coordinate invitations, marketing materials and ads for each event on an as needed basis.
 - Manage seating, nametags, day of event logistics, set up and staffing.
 - Ensure overall participant satisfaction during events.
 - Conduct post event follow up – debrief and report on each event, to include metrics, attendance and other data.
 - Prepare and track a budget for each event.
 - When appropriate, create and run audiovisual materials at events.
- Research potential speakers. Plan all logistics for speakers including itinerary, travel, hotel and individual speaker needs.
- Enter and maintain speaker, vendor and venue information in the CRM database.
- Enter all events into the CRM database, including RSVPs, payments and budget tracking. Create and update event queries. Pull mailing and attendance lists as needed.
- Ensure that all invoices are coded correctly and submitted to the Business Services department for payment. Collect W9s and applicable information from vendors.
- When appropriate, plan events and logistics for visiting delegations from Israel.
- Maintain paper and electronic files for all marketing collateral for events.
- Attend and participate in all appropriate department meetings and events.
- Assist other departments with event outreach efforts when required.
- Develop and maintain relationships with volunteers and outside vendors.

Qualifications

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The Event Planner must be able to staff events or attend meetings occasionally on evenings and weekends.

Required Education/Credentials/Experience

- Bachelor's degree preferred, but a combination of education, training and experience may be adequate.
- 2-3 years administrative experience preferred

Required Skills/Abilities

- Strong oral, written and interpersonal skills; ability to communicate professionally to a diverse audience
- Extreme accuracy with above average attention to detail
- Highly organized self-starter with ability to prioritize workload while meeting both short and long-term deadlines
- Ability to work evenings and weekends when necessary
- Reliable transportation for off-site meetings, some of which are unplanned, and to transport event materials

Required Computer Skills

- To perform this job successfully, an individual should be proficient with Microsoft 365 (especially Excel and Power Point), formal document preparation, Internet applications, and database management.
- Experience operating audiovisual equipment is ideal.

Supervisory Responsibility

This position has no supervisory responsibility.

Work Environment

- This position operates in a professional office environment. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines.

- On occasion the position will require work during non-traditional office hours to assist/attend programs, meetings and events.

Physical Demands

This is largely a sedentary role; however, some filing is required. This would require the ability to lift files, open filing cabinets and bend or stand as necessary. On occasion may also help transport and carry meeting and event supplies. On occasion it may be necessary to lift and/or move up to 15-20 pounds, usually waist high.

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required to perform the job. Duties, responsibilities and activities may change at any time with or without notice.

About the Milwaukee Jewish Federation

Since 1902, the Milwaukee Jewish Federation has been dedicated to caring for the needs of the Jewish people and building a vibrant Jewish community in Milwaukee, in Israel and around the world. We distributed \$20 million last year to Jewish and non-Jewish organizations and manage \$190 million through our Jewish Community Foundation.

The Milwaukee Jewish Federation provides equal employment opportunities (EEO) to all employees and applicants for employment without regard to race, color, religion, gender, sexual orientation, gender identity, national origin, age, disability, genetic information, marital status, amnesty or status as a covered veteran in accordance with applicable federal, state and local laws.

To apply, please send a cover letter and resume to HR@MilwaukeeJewish.org with “Event Planner” as the subject line.