## Job Series Matrix

### Job Series: Events Planner

**Job Purpose:**
Plan and execute Stanford events, such as seminars, conferences, sports or alumni events, and other university related events. Coordinate logistics, including registration and attendee tracking, presentation and materials support and pre and post event evaluations. Procure and coordinate vendor services. Coordinate facility, exhibit set-up, equipment and catering requirements. Provide on-site event support. May research potential event locations and evaluate alternatives.

**Core Duties:**
- Design, plan, implement, and coordinate customized events.
- Evaluate and select vendors and providers of services considering stakeholder requests and requirements.
- Serve as a member of an events team, and contribute in a wide variety of functional areas including decisions around budget allocation, event logistics and facilities.
- Consult with stakeholders to determine objectives and requirements.
- Inspect event facilities to ensure they conform to event standards.
- Manage accounting operations relating to registration, including daily accounting procedures and reports, final monetary summaries, and/or account transfers.
- May serve as project leader on smaller scale events, coordinating teams that plan, implement, and manage event operations.

**Additional jobs in this series on following pages:**

<table>
<thead>
<tr>
<th>Job Title</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Events Coordinator</td>
<td>Events Planner 1</td>
<td>Events Planner 2</td>
<td>Events Planner 3</td>
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<tr>
<td>Grade: E</td>
<td>Grade: F</td>
<td>Grade: G</td>
<td>Grade: I</td>
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<tr>
<td>Exemption: Non-exempt</td>
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**Job Purpose:**
- Plan and execute Stanford events, such as seminars, conferences, sports or alumni events, and other university related events. Consult with stakeholders and plan logistics, including registration and attendee tracking, presentation and materials support, and pre- and post-event evaluations.

**Core Duties:**
- Oversee registration strategy and logistics.
- Build and maintain relationships with internal and external partners.
- Procure and coordinate vendor services. Negotiate vendor contracts to minimize liability and risks.
- Research and provide recommendations for potential event locations, and evaluate alternatives.

**Job Purpose:**
- Assist in the planning and execution of Stanford events, such as seminars, conferences, sports or alumni events, and other university related events. Coordinate logistics, including registration and attendee tracking, presentation and materials support, and pre- and post-event evaluations.

**Core Duties:**
- Support the design, planning, implementation, and coordination of Stanford events.
- Contribute to vendor and site selection, arrangements, and scheduling.
- Coordinate event registration and confirmations.
- Process purchase requisitions and invoices; track event expenses.
- Provide general administrative assistance for department; handle phone calls, emails, and other correspondence relating to event(s).
- Liaise with donors, alumni, senior staff, faculty, trustees, and other staff.
- Coordinate facility, exhibit set-up, equipment, and catering requirements. Provide on-site support, such as check-ins, directions, equipment set-up, and event parking.
- Run database lists, and communicate registration status, reports, and data.

**Core Duties:**
- Operate as account manager on deliverables, departmentally to prepare and manage specific projects.
- Lead and manage event teams charged with producing high-quality events. Serve as project leader on complex, large-scale events, including responsibility for financial management. Provide training and guidance to colleagues.
- Build and maintain relationships with internal and external university partners.
- Act as department representative at cross-departmental project meetings.
- Operate as account manager on deliverables, program metrics, and status reports.
- Work cross-departmentally to prepare and manage complex program budgets.
- Recommend and schedule events into appropriate off-campus and on-campus venues.
- Oversee registration strategy and logistics.
**Job Series Matrix**

<table>
<thead>
<tr>
<th>Required or combination of education and relevant experience.</th>
<th>Minimum Knowledge, Skills and Abilities Required</th>
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<tr>
<td><strong>Minimum Education and Experience Required</strong></td>
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<tr>
<td>Associate degree and two years of relevant experience or combination of education and relevant experience.</td>
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<tr>
<td><strong>Knowledge of supporting events.</strong></td>
<td><strong>Demonstrated success planning events.</strong></td>
<td><strong>Demonstrated success managing event teams and planning, developing budgets, and meeting budget goals.</strong></td>
<td><strong>Superior project and event management skills.</strong></td>
<td><strong>Ability to manage a diverse team of staff and contingent labor, holding them to deadlines and the highest quality output.</strong></td>
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<tr>
<td><strong>Ability to manage shifting priorities and handle numerous time-sensitive projects with multiple deadlines.</strong></td>
<td><strong>Ability to work both independently and as part of a team.</strong></td>
<td><strong>Excellent project management skills, and the ability to manage complex timelines and multiple projects.</strong></td>
<td><strong>Demonstrated experience with financial management of complex event budgets requiring excellent analytical skills.</strong></td>
<td><strong>Ability to prioritize and manage complex workflows.</strong></td>
</tr>
<tr>
<td><strong>Ability to work independently and be self-motivated.</strong></td>
<td><strong>Ability to establish priorities, manage shifting priorities, and handle numerous time-sensitive projects with multiple deadlines.</strong></td>
<td><strong>Ability to work both independently and as part of a team.</strong></td>
<td><strong>Extreme attention to detail and deadlines; ability to prioritize and manage complex workflows.</strong></td>
<td><strong>Excellent communication, time management, and customer service skills.</strong></td>
</tr>
<tr>
<td><strong>Demonstrated ability in problem solving, taking initiative, judgment, and decision-making.</strong></td>
<td><strong>Demonstrated creativity, problem solving skills, taking initiative, judgment, and decision-making skills.</strong></td>
<td><strong>Excellent interpersonal, communication, time management, and customer service skills. Must be well organized and detailed oriented.</strong></td>
<td><strong>Exceptional customer service skills with the ability to cultivate partnerships.</strong></td>
<td><strong>Ability to accomplish goals working through formal and informal channels, with diplomacy and tactfulness.</strong></td>
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<tr>
<td><strong>Excellent interpersonal, communication, time management, and customer service skills. Must be well organized and detailed oriented.</strong></td>
<td><strong>Ability to accomplish goals working through formal and informal channels, with diplomacy and tactfulness.</strong></td>
<td><strong>Demonstrated high level of confidence in making strategic decisions, good judgment, and innovative and creative problem-solving skills.</strong></td>
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<tr>
<td><strong>Knowledge of Microsoft Office suite and other online documents, such as Google Docs.</strong></td>
<td><strong>Excellent interpersonal, communication, time management, and customer service skills. Must be well organized and detailed oriented.</strong></td>
<td><strong>Knowledge of Microsoft Office suite, File Maker Pro and knowledge of cloud applications such as Google Docs and Forms.</strong></td>
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<tr>
<td><strong>Ability to interact with a broad spectrum of customers.</strong></td>
<td><strong>Knowledge of Microsoft Office suite and other online documents, such as Google Docs.</strong></td>
<td><strong>Ability to interact and successfully collaborate with a broad spectrum of contributing groups and customers.</strong></td>
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</tr>
</tbody>
</table>

- Required
- Associate degree and three years of relevant experience or combination of education and relevant experience.
- Bachelor’s degree and three years of relevant experience or combination of education and relevant experience.
- Bachelor’s degree and five years of relevant experience or combination of education and relevant experience.
### Work Standards

- **Interpersonal Skills:** Demonstrates the ability to work well with Stanford colleagues and clients and with external organizations.
- **Promote Culture of Safety:** Demonstrates commitment to personal responsibility and value for safety; communicates safety concerns; uses and promotes safe behaviors based on training and lessons learned.
- **Subject to and expected to comply with all applicable University policies and procedures, including but not limited to the personnel policies and other policies found in the University’s Administrative Guide, [http://adminguide.stanford.edu/](http://adminguide.stanford.edu/).**

- **When conducting university business, must comply with the California Vehicle Code and Stanford University driving requirements.**
- **Interpersonal Skills:** Demonstrates the ability to work well with Stanford colleagues and clients and with external organizations.
- **Promote Culture of Safety:** Demonstrates commitment to personal responsibility and value for safety; communicates safety concerns; uses and promotes safe behaviors based on training and lessons learned.
- **Subject to and expected to comply with all applicable University policies and procedures, including but not limited to the personnel policies and other policies found in the University’s Administrative Guide, [http://adminguide.stanford.edu/](http://adminguide.stanford.edu/).**

### Working Conditions

- **May require some travel and working evenings and weekends.**
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### Physical Requirements

- **Frequently stand/walk, sit, perform desk-based computer tasks, and use a telephone.**
- **Occasionally kneel/crawl, twist/bend/stoop/squat, grasp lightly/fine manipulation, and grasp forcefully, lift/carry/push/pull objects that weigh 21-40 pounds.**
- **Ability to maintain a California Non-commercial Class license and drive day or night.**
- **Ability to maintain a California Non-commercial Class license and drive day or night.**

### Certificates and Licenses Required

- **Valid Non-Commercial Class California Driver’s License.**
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**Manager Levels on next page**
Job Purpose

Provide leadership and direction for new and current event programs and projects for a department/unit. Contribute to the development of strategic plans and long-term objectives. Communicate organizational mission to staff, including student workers and volunteers, to maximize effectiveness and university exposure. Develop and mentor staff, providing opportunities for professional growth and ensuring the efficient operation of events.

Core Duties

- Manage staff in the day-to-day operations for functional area(s) of responsibility. Responsible for hiring and retaining staff, career coaching, personal development for direct reports and accountable for the performance of employees. Ensure work completion within schedule and constraints.
- Provide strategic leadership for the creation, development, and execution of events.
- Build effective and focused event planning teams; create strong morale and team spirit.
- Oversee the management of event teams and/or production consultants to produce quality, multi-faceted events and productions.
- Work cross-departmentally to prepare and manage complex program budgets and ROI proposals.
- Delegate both routine and important tasks and decisions, while assuming final responsibility for event logistics through effective team management.
- Frequently interact with subordinate supervisors, customers, and/or functional peer group managers, normally involving matters between functional areas or other schools, departments/units.
- Analyze successes and failures and implement improvements; marshal resources to accomplish goals.
- Direct staff and provide leadership to achieve goals and vision of the organization and the day-to-day operations. Responsible for hiring and retaining staff, career coaching, personal development for direct reports and accountable for the performance of employees.
- Provide strategic leadership for the creation, development, and execution of events.
- Build effective and focused event planning teams; create strong morale and team spirit.
- Oversee the management of event teams and/or production consultants to produce quality, multi-faceted events and productions.
- Work cross-departmentally to prepare and manage complex program budgets and ROI proposals.
- Delegate both routine and important tasks and decisions, while assuming final responsibility for event logistics, through effective team management.
- Interact with senior management across the university in support of event strategy and planning processes of high impact (major) Stanford and university community events/programs.
- Oversee the management of event teams and/or production consultants to produce quality, multi-faceted events and productions.
- Work cross-departmentally to prepare and manage complex program budgets and ROI proposals.
- Delegate both routine and important tasks and decisions, while assuming final responsibility for event logistics, through effective team management.
- Interact with senior management across the university in support of event planning goals for a school, unit or VP area.
- Analyze successes and failures and implement improvements; marshal resources to accomplish goals.
- Oversee the scope and difficulty of tasks, projects, and events; help team break down work into process steps. Identify opportunities for synergy and integration.

Job Purpose

Provide leadership, direction, and vision on new and current event programs and projects for multiple departments and/or a school/VP area. Develop strategic plans and long-term objectives for department in collaboration with other senior managers. Communicate organizational mission to staff, including student workers and volunteers, to maximize effectiveness and university exposure. Develop and mentor staff, providing opportunities for professional growth and ensuring the efficient operation of events.

Core Duties

- Direct staff and provide leadership to achieve goals and vision of the organization and the day-to-day operations. Responsible for hiring and retaining staff, career coaching, personal development for direct reports and accountable for the performance of employees.
- Provide strategic leadership for the creation, development, and execution of events.
- Build effective and focused event planning teams; create strong morale and team spirit.
- Oversee the management of event teams and/or production consultants to produce quality, multi-faceted events and productions.
- Work cross-departmentally to prepare and manage complex program budgets and ROI proposals.

Job Purpose

Produce and provide counsel on highly complex, high profile university-wide events that attract thousands of attendees. Has ultimate responsibility for the vision, strategy and execution of all aspects of event planning and production, creating policies and overseeing procedures, mitigating risk and liability, creating and overseeing marketing techniques/strategies for the highest visibility university-wide events/programs. These events may include, Commencement Weekend, Parent’s Weekend, New Student Orientation, and Reunion Homecoming. Provide oversight for significant events, such as visiting dignitaries, heads-of-state, building groundbreakings and dedications; and events hosted by the president, provost, and other high-level academic officials. This is a leadership position that typically reports to a cabinet member of the university.

Core Duties

- Oversee the management of areas of responsibility. Direct staff and provide leadership to achieve goals and vision of the organization. Responsible for hiring and retaining staff, career coaching, personal development for direct reports and accountable for the performance of employees.
- Provide vision, strategic leadership and oversight for all aspects of the operation.
- Participate in university leadership circles as a key member in the event strategy and planning processes of high impact (major) Stanford and university president’s events.
- Forge, manage and grow partnerships within and outside the university community. Engage with university faculty and their staff in planning events as well as student groups and outside professional organizations.
- Analyze, guide and promote best practices in event planning. Analyze successes and failures and implement improvements; marshal resources to accomplish goals.
- Create and present event policies and procedures through education and marketing initiatives.
- Foster and advance university event collaborations with faculty, student leaders, alumni and donors.
### Minimum Education and Experience Required

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<thead>
<tr>
<th>Position 1</th>
<th>Position 2</th>
<th>Position 3</th>
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<tbody>
<tr>
<td>Bachelor’s degree and eight years of relevant experience or combination of education and relevant experience.</td>
<td>Bachelor’s degree and ten years of relevant experience or combination of education and relevant experience.</td>
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### Minimum Knowledge, Skills and Abilities Required

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<tr>
<td>Demonstrated history in creating innovative event planning strategies and successful event collaborations.</td>
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<td>Strong commitment to further the mission and goals of Stanford University.</td>
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<tr>
<td>Excellent judgment and decisiveness, high integrity, enthusiasm, diplomacy, and tact.</td>
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<td>Demonstrated expertise in strategic planning and overseeing implementation of strategy, creativity, self-confidence, vision, and leadership.</td>
</tr>
<tr>
<td>A collaborative leader who engages and empowers an organized team of event planning professionals, fostering a strong, cohesive team environment.</td>
<td>A collaborative leader who engages and empowers an organized team of event planning professionals, fostering a strong, cohesive team environment.</td>
<td>Successful track record of collaboration and use of diplomacy in a complex political and social university environment. Exceptional customer service skills with the ability to cultivate professional business partnerships.</td>
</tr>
<tr>
<td>Superior verbal and written communication skills.</td>
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<td>Demonstrated history in creating innovative event planning strategies and successful event collaborations.</td>
</tr>
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<td>Skilled at developing a staff of professionals and support personnel. Includes selection, motivation, and leadership of staff, as well as evaluation and development.</td>
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<td>A collaborative leader who engages and empowers an organized team of event planning professionals, fostering a strong, cohesive team environment.</td>
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<td>Demonstrated competency in budget management, cost accounting and vendor contract relationships.</td>
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<td>Excellent facility for overseeing numerous polices and understanding their relationships to one another when analyzing events and promoting best practices.</td>
</tr>
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<td>Exceptional customer service skills with the ability to cultivate professional business partnerships.</td>
<td>Exceptional customer service skills with the ability to cultivate professional business partnerships.</td>
<td>Excellent communication and writing skills and the ability to develop long-term working relationships with faculty, staff, donors, alumni, students, and others outside of Stanford.</td>
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### Certificates and Licenses Required

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## Physical Requirements
- Frequently stand/walk, sit, perform desk-based computer tasks, and use a telephone.
- Occasionally kneel/crawl, twist/bend/stoop/squat, grasp lightly/line manipulation, and grasp forcefully, lift/carry/push/pull objects that weigh 21-40 pounds.
- Ability to obtain and maintain a California Class C license and drive day or night.
- Frequently stand/walk, sit, perform desk-based computer tasks, and use a telephone.
- Occasionally kneel/crawl, twist/bend/stoop/squat, grasp lightly/line manipulation, and grasp forcefully, lift/carry/push/pull objects that weigh 21-40 pounds.
- Ability to obtain and maintain a California Class C license and drive day or night.

## Working Conditions
- May require some travel and working evenings and weekends.
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## Work Standards
- When conducting university business, must comply with the California Vehicle Code and Stanford University driving requirements.
- Interpersonal Skills: Demonstrates the ability to work well with Stanford colleagues and clients and with external organizations.
- Promote Culture of Safety: Demonstrates commitment to personal responsibility and value for safety; communicates safety concerns; uses and promotes safe behaviors based on training and lessons learned.
- Subject to and expected to comply with all applicable University policies and procedures, including but not limited to the personnel policies and other policies found in the University’s Administrative Guide, http://adminguide.stanford.edu/.
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