

## POSITION DESCRIPTION

**Title:** Meeting Planner (vacant)

**Reports to:** Director of Meeting Services

### **Scope of Responsibilities**

Responsible for all aspects of meeting planning functions for assigned continuing education seminars and related Society events. The Meeting Planner serves as a staff liaison for support of the following committees that fall under the Vice-President, Professional Education: Enterprise Risk Management Symposium (Organizing), Professional Education Policy, Program Planning, Professionalism Education, and Reinsurance Seminars.

### **Basic Duties**

1. Coordinate the site selection and contract negotiation process with hotels/meeting facilities (for Executive Director approval) for all assigned seminars and events, making necessary logistical arrangements. Make site inspection visits to hotels for CAS meetings and seminars when appropriate.
2. Negotiate contracts with hotels/meeting facilities for all assigned events, making all necessary arrangements for meetings, lodging, meals, entertainment, etc.
3. Develop plans to handle meeting room and all other logistical needs consistent with the program content and attendance for assigned events.
4. Prepare budgets for all assigned events for input to the annual CAS budget. Coordinate with Director of Meeting Services as appropriate for consistent planning factors.
5. Attend assigned meetings, seminars, and other meetings to support onsite logistics.
6. Provide staff support for designated committees to include input to programs, logistics, etc. Coordinate the creation of announcements, preparation and distribution of minutes and speaker correspondence, and respond to other administrative tasks as assigned by the committee chairperson while ensuring plans are progressing within time and budget constraints.
7. Mail informational letter to speakers prior to each assigned event, to include agenda, required materials, shipping information, expense reimbursement procedures, etc.
8. Work directly with designated committees, internal marketing committee, and the Desktop Publisher to produce and implement the marketing plans for assigned events, to include registration brochures and onsite programs.
9. For all assigned events, review and approve hotel bills and other meeting planning invoices.

10. For assigned events complete/delegate all administrative meeting services tasks, including:
  - a. Receive and enter event registrations into database
  - b. Prepare name badges, tickets, attendee lists, and reports as required
  - c. Send confirmation letters to registrants
  - d. Assemble and coordinate mailing of event materials as required, including all onsite materials
  - e. Create evaluation forms and compile results and reports
  - f. Issue invoices for balances due
  - g. Prepare reproduction and mailing forecasts for the Operations Assistant to facilitate mailroom support for the event
  - h. Maintain files for assigned events
  - i. Select and purchase speaker gifts for assigned events
  
11. Ensure that all necessary information for all assigned events is posted on the CAS Web Site. This includes the preliminary programs with registration information, links to local CVB and/or hotel or resort, attendance lists, handouts, etc.
  
12. Plan and support the following events:
  - a. Annual Meeting
  - b. Seminar on Reinsurance
  - c. Enterprise Risk Management Symposium
  - d. Leadership Meeting
  - e. September Board MeetingAlso includes other meetings as assigned.
  
13. Maintain and distribute periodic attendance figures and room block fulfillment to Executive Director, VP-Professional Education, Meeting Services Department, and event planning committee for assigned events.
  
14. Provide guidance and direction to Assistant Meeting Planner in the daily operations of the Meeting Services Department, including a focus on continuing professional development.
  
15. Assist Director of Meeting Services and Assistant Meeting Planner as dictated by cyclical workload; assist other operating areas of the CAS Office as needed.
  
16. Complete special projects as requested by supported committees, Executive Director, or by the Director of Meeting Services

## **Qualifications**

1. Fully accredited Bachelor's degree with course work relevant to scope of responsibilities.
2. Experience/ability to accomplish all assigned meeting planning functions.
3. Certified Meeting Professional (CMP) designation/qualifications preferred; Event Management coursework also preferred.
4. Excellent organizational, communication, multi-tasking, and problem-solving skills.
5. Proficient in Microsoft Office; full use of Internet; database experience.

## **Measure of Accountability**

Meeting/Seminar planning committees and assigned meetings/seminars receive effective and responsive staff support. Facilities selected meet the needs of the assigned meetings/seminars and the attendees. Assigned meetings/seminars conducted in cost-effective manner and within budgets. Registrations, evaluations and other administrative tasks accomplished effectively. Negotiation of favorable contract terms for assigned meetings/seminars. Special projects completed within criteria. Continuation of professional development.