

JOB DESCRIPTION

Program & Office Coordinator

Classification: exempt

Reports to Executive Director and Medical Director; **Date** 05.13.2015

Summary

The program and events coordinator provides operations and administrative support for the team including coordinating training events, fulfilling product orders, processing of payments, and delivering high quality customer service and information to our network. This position serves as a liaison between departments to ensure accuracy and streamlined processes.

In addition to typing and scheduling, performs duties such as financial record keeping; report writing; computer record updates in a Customer Relationship Management (CRM) program; coordination of meetings, travel, and conferences; answering phone calls; responding to emails and sorting email communication; creating high-quality email responses; obtaining supplies; preparing email marketing campaigns; preparing for webinars, taking meeting minutes; and working on special projects: both project management and marketing related projects. Also, answers non-routine correspondence and assembles information. Deals with a diverse group of important external callers and email correspondence that is sensitive and confidential. Independent judgment is required to plan, prioritize and organize diversified workload. Recommendations for changes in office practices or procedures are welcomed.

Essential Functions

Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Office Management:

1. Schedules, arranges, and organizes training events, meetings, travel, conferences and activities for all senior members of the organization.
2. Data: Maintains and updates a customer relationship management system (CRM) accurately. Retrieves information when needed.
3. Manages and updates a Microsoft Excel spreadsheet; importing, and exporting as needed.
4. Organizes and prioritizes large volumes of information and calls.
5. Supports in maintenance of the finances. Activities include: sending requests for invoices, monitoring invoices for payment, handling payable travel reimbursement, documenting corporate credit card expenses, tracking income and outstanding accounts receivable.
6. Help with website and social media updates.

Communication:

7. Sorts and distributes e-mail and phone messages. Drafts detail-oriented written responses or replies by phone or e-mail when necessary.
8. Responds to regularly occurring requests for information. Uses judgement to delegate.
9. Answers phones. Takes messages or fields/answers all routine and non-routine questions.
10. Acts as a liaison with other departments and outside agencies, including high-level staff such as CEOs and presidents. Handles confidential and non-routine information.

Project Management:

11. Works independently and within a team on special nonrecurring and ongoing projects.
12. Acts as project manager for special projects, which may include: planning and coordinating multiple presentations, disseminating information, coordinating meeting handouts, and managing promotions.
13. Creates and designs general correspondences, agendas, charts, tables, graphs, etc. Proofreads copy for spelling, grammar and layout, making appropriate changes. Responsible for accuracy and clarity of final copy.
14. Coordinates the development of contracts and all aspects of live and online training events.

Meeting Management and Organization:

15. Manages action items to ensure tasks and projects are completed in a timely manner.
16. Helps lead large group meetings taking meeting minutes and keeping meeting on track.
17. Responsible for ensuring other staff are following the editorial calendar and other routine tasks.

Customer Service:

18. Following up with potential clients and monitoring when additional information is needed.
19. Answering client questions or connecting them to staff with the answers.
20. Batch and process applications and reports: both programmatic reports and basic financial reports.
21. Provide accurate and quality customer service and information for all sales and inquiries via phone, mail or e-mail. MUST be comfortable on the phone.
22. Provide a timely response to all requests and inquiries.

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

Competencies

1. **Technical Capacity:** Excellent Microsoft office PC skills (Word, Excel, PowerPoint, and Publisher) at an intermediate level: must know basic keyboard shortcuts (e.g. Control+C). Must be excellent with Internet searches and proactive in quickly learning new technology. Experience with CRM and/or minor updates in WordPress websites a major plus!
2. **Time Management and Organization**
3. **Thoroughness and attention to detail**
5. **Communication Proficiency**
6. **Flexibility:** comfortable in an environment that is growing and improving its systems.

Position Type and Expected Hours of Work

This is a full-time position. Days and hours are Monday through Friday, plus a few weekends/year.

Minimum Education and Experience

1. Associate's degree; (prefer Bachelor's Degree)
2. Minimum of two years of related experience.