

Conference Planning Checklist

<p style="text-align: center;">9 months prior to Conference:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Seek co-sponsorship w/ other clubs <input type="checkbox"/> Select faculty advisor (if necessary) <input type="checkbox"/> Prepare a planning calendar <input type="checkbox"/> Recruit volunteers <input type="checkbox"/> Consult with Amy Hornstein & Kate Tobias, re: keynote speakers, marketing & sponsorship (Amy will refer you to Marketing, Alumni and Development offices) <input type="checkbox"/> Review fundraising guidelines on the MBA Program Website <input type="checkbox"/> Request shared server space <input type="checkbox"/> If conference already has shared server space, review archived materials <input type="checkbox"/> If you do not have a checking account for the conference, consider opening one 	<p style="text-align: center;">6 months prior to Conference:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Send target sponsorship list to Todd Ewing & the appropriate Career Services Account Manager for approval <input type="checkbox"/> Begin sponsorship outreach process with a tracking system in place <input type="checkbox"/> Send "Save the Date" to Dean/VIP/Senior Administrators <input type="checkbox"/> Discuss logistics with Amy Hornstein or Kate Tobias <input type="checkbox"/> Notify Dana Lund in Media Services of preliminary plans <input type="checkbox"/> Write a message platform <input type="checkbox"/> Continue working with Marketing, Development, Alumni & Student Services, re: potential speakers/panelists and sponsorship
<p style="text-align: center;">5 months prior to Conference:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Consider meeting with Career Services, re: networking opportunities <input type="checkbox"/> Continue fundraising <input type="checkbox"/> Work with Amy Hornstein to obtain and create a website <input type="checkbox"/> Work with Kate Tobias, re: catering, rentals & special needs <input type="checkbox"/> Consult Admission, re: prospective student involvement 	<p style="text-align: center;">4 months prior to Conference:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Set an invitation deadline <input type="checkbox"/> Confirm moderators & speakers <ul style="list-style-type: none"> -request biographies -have them sign Video Release Form
<p style="text-align: center;">3 months prior to Conference:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Update website <input type="checkbox"/> Work on invitations and publicity materials <input type="checkbox"/> Send save the date 	<p style="text-align: center;">2 months prior to Conference:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Design a printed program <input type="checkbox"/> Update website/registration/payment information <input type="checkbox"/> Order gifts/awards <input type="checkbox"/> Contact Dana Lund, re: Media Services details
<p style="text-align: center;">1 month prior to Conference:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Utilize MBA Alert, Haas Alert & HaasWeek to publicize <input type="checkbox"/> Send announcement to Faculty <input type="checkbox"/> Invite alums <input type="checkbox"/> Finalize printed materials & website <input type="checkbox"/> Prepare Conference Committee Schedule <input type="checkbox"/> Notify speakers of allotted time <input type="checkbox"/> Prepare student introductions & speaking points <input type="checkbox"/> Invite senior administrators to conference <input type="checkbox"/> Finalize media, equipment & catering needs <input type="checkbox"/> Send email invitations <input type="checkbox"/> Ensure that Alcohol, Food & BBQ permits have been approved 	<p style="text-align: center;">3 weeks prior to Conference:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Finalize method of payment for vendors <input type="checkbox"/> Finalize ordering equipment <input type="checkbox"/> Coordinate clean-up/custodial work orders/facilities <input type="checkbox"/> Print program

<p style="text-align: center;">2 weeks prior to Conference:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Finalize set-up times & specifics with Media Services <input type="checkbox"/> Final email reminders <input type="checkbox"/> Prepare all gifts & cards <input type="checkbox"/> Send “Thank you for agreeing to participate” letters <input type="checkbox"/> Schedule promotional item/gift pick-up with Alumni office <input type="checkbox"/> Contact Ute Frey, re: Media Advisory 	<p style="text-align: center;">1 weeks prior to Conference:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Provide copies of the program to the Dean’s Council <input type="checkbox"/> Provide the Dean with talking points and bios <input type="checkbox"/> Finalize the Conference Committee Schedule <input type="checkbox"/> Finalize computer registration list <input type="checkbox"/> Provide details to speakers and VIP guests <ul style="list-style-type: none"> -parking & directions -student hosts
<p style="text-align: center;">Week of the Conference:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Final committee meeting to review schedule <input type="checkbox"/> Meet with Media Services <input type="checkbox"/> Finalize logistical details for speakers (parking permits, directions) <input type="checkbox"/> Create nameplates for panelists <input type="checkbox"/> Print nametags for all registrants <input type="checkbox"/> Create signage <input type="checkbox"/> Final advertising push <input type="checkbox"/> Adjust catering numbers <input type="checkbox"/> Confirm that all speakers/panelists have signed video release 	<p style="text-align: center;">Day of the Conference:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Arrive at least two hours prior to the conference <input type="checkbox"/> Set up registration table <input type="checkbox"/> Drape club or Haas banner on registration table <input type="checkbox"/> Give registration volunteers check-in procedures <input type="checkbox"/> Post easels and signage directing guests to event location <input type="checkbox"/> Check media in each room <input type="checkbox"/> Check room set-ups <input type="checkbox"/> Have greeters at key locations <input type="checkbox"/> Escort all speakers throughout the day
<p style="text-align: center;">Post Conference:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Send thank you notes <input type="checkbox"/> Save all documents to shared drive <input type="checkbox"/> Set up a debrief meeting with Amy Hornstein (within 1 month) <input type="checkbox"/> Provide Alumni Relations, Marketing & Communications and Career Services with final list of alumni & recruiter attendees <input type="checkbox"/> Provide Todd Ewing with final sponsorship list <input type="checkbox"/> Reconcile budget <input type="checkbox"/> Take website off-line or update <input type="checkbox"/> Select new conference chairs and provide new contacts to Amy Hornstein <input type="checkbox"/> Be sure to sign over checking account to new conference leaders 	

Important Contacts:

Initial Contacts for all other conferences:

Amy Hornstein (amyh@haas.berkeley.edu) 642-1408

Julia Hwang (julia_hwang@haas.berkeley.edu) 642-1407

Kate Tobias (ktobias@haas.berkeley.edu) 642-6134

Marketing & Communications:

Rich Kurovsky (kurovsky@haas.berkeley.edu) 642-5939

Ute Frey (frey@haas.berkeley.edu) 642-0342

Alumni Relations:

Meg Roundy (meg@haas.berkeley.edu) 643-5086

Fundraising Guidelines:

<http://www.haas.berkeley.edu/MBA/student/fundraising-guidelines.html>

Corporate Sponsorship:

Todd Ewing (todd_ewing@haas.berkeley.edu) 642-1907

Contact with the Dean & Senior Administrators:

Marco Lindsey (marco@haas.berkeley.edu) 643-2027

Susie Jordan (sjordan@haas.berkeley.edu) 643-8782

Venue, Catering, Equipment Rental:

Amy Hornstein (amyh@haas.berkeley.edu) 642-1408

Kate Tobias (Tobias@haas.berkeley.edu) 642-6134

Media Services:

Dana Lund (dlund@haas.berkeley.edu) 643-8330

On-campus Room Reservations:

Kendall Dockham (roomres@haas.berkeley.edu) 643-0475

Facilities:

Gerardo Campos (gcampos@haas.berkeley.edu) 642-4617

Central Campus/Off-Campus Reservations:

Amy Hornstein (amyh@haas.berkeley.edu) 642-1408

Kate Tobias (Tobias@haas.berkeley.edu) 642-6134

Website:

helpdesk@haas.berkeley.edu