

How to Plan a Conference

The student chairs for the ABC and WIL conferences should contact Faye Lawson, lawson@haas.berkeley.edu, to begin planning their events. All other conference chairs should contact the MBA Program staff, Amy Hornstein, amyh@haas.berkeley.edu and Kate Blumberg, blumberg@haas.berkeley.edu and follow the guidelines below.

Key Areas to Consider

Please note that these roles and responsibilities may be assigned differently for each conference. Some conferences may have a single leader for each of the following areas, while others may have leaders responsible for specific details in each area.

Conference Chair

- Theme and date
 - Consult Executive Director of MBA Program (Julia Hwang) & Director of Student Affairs (Amy Hornstein) to discuss theme and availability of resources.
- Recruit a committee
 - Decide what areas you need leadership in and charge volunteers with responsibilities.
 - Create a conference committee schedule for Conference Day.
- Shared server space
 - For a new conference, request shared server space from Director of Student Affairs (Amy Hornstein) and archive all conference planning materials here.
 - For an existing conference, get access to, and consult the shared server space.
- Calendar
 - Prepare a planning calendar with target dates and deadlines.
- Invitation
 - Invite the Dean by contacting his assistant (Marco Lindsey) and Ccing the Dean's Analyst (Susie Jordan.)
 - Get a list of Senior Administrators you might wish to invite from Director of Student Affairs (Amy Hornstein.)
- Message platform
 - Write a message platform that includes:
 - who/what/when/where details
 - sponsor information
 - purpose of the event
 - context of the event
- Checking account
 - Will you be using your club checking account or is a new account needed for the conference? If a new account is needed, the Director of Student Affairs will provide you with a letter of introduction for the Credit Union.

- Make sure that those authorized to sign checks last year are removed from the account and new finance people are added.

Sponsorship

- Co-sponsorship
 - Ask other clubs for co-sponsorship.
- Fundraising
 - Review the fundraising guidelines online at <http://www.haas.berkeley.edu/MBA/student/fundraising-guidelines.html>
- Corporate Sponsorship
 - Contact Associate Director of Corporate & Foundation Relations (Halina Avery) to begin targeting potential sponsors.
 - Contact the appropriate Account Manager in CSO for recruiters' contacts.
 - Provide Associate Director of Corporate & Foundation Relations (Halina Avery) with a final sponsorship list after the event.

Speakers

- Keynote speakers & panelists
 - Contact Associate Director of Student & Alumni Relations (Meg Roundy) and Executive Director of Marketing & Communication (Rich Kurovsky) for potential keynote speakers and panelists.
 - If needed, compose invitation for keynote speakers for Dean's signature. Route through his assistant (Marco Lindsey.)
 - Notify speakers of allotted time, including Q&A.
 - Prepare introductions.
 - Create nameplates for panelists.
- Gifts for speakers
 - Chocolates, wine, gift cards or customized gifts (HaasGear, Alumni Relations may be able to help) are suggested.
- Video Recording
 - Have all speakers and panelists sign the video release form which can be found at <http://groups.haas.berkeley.edu/media/word/HMS%20Filming%20Rights%20Contract.doc>

Marketing

- Marketing plan
 - Contact Executive Director of Marketing & Communications (Rich Kurovsky) and Associate Director (Ute Frey) to discuss your marketing plan.
- Publicity

- Review publicity guidelines at <http://www.haas.berkeley.edu/MBA/student/publicity-tips.html>
- Contact Associate Director of Marketing & Communications (Ute Frey) to discuss publicity, conference logo approval and possible media coverage.
- Utilize MBA Alert, Haas NewsWire and HaasWeek for publicity.
- Research and contact local professional organizations in your industry.
- Invitation
 - Create invitation letters.
 - Request a letter of support from the Dean, encouraging those you invite to participate, through Executive Director of Marketing & Communication (Rich Kurovsky) if needed.
 - Contact Associate Director of Student & Alumni Relations (Meg Roundy) to coordinate alumni invitations. Be sure to capture Alumni information.
 - Send email invitations.
- Website
 - Contact helpdesk@haas to obtain a website.
- Photographer
 - Contact Marketing & Communications
 - for recommendations
 - to find out if they will be sending a photographer on behalf of Haas
- Program
 - Campus Copy or FedEx Kinko's are recommended.
 - If your program includes a welcome from the Dean, Executive Director of Marketing & Communications (Rich Kurovsky) must review it.
- Signage/Banners
 - Campus Copy or FedEx Kinko's are recommended.
 - Meet with Facilities Coordinator (Gerardo Campos) to discuss hanging banners.
 - Easels to hang signage can be borrowed from Media Services.
- Vendors
 - Director of Student Affairs (Amy Hornstein) or Student Services Coordinator (Kate Blumberg) can provide a list of other recommended vendors of balloons, gift bags, banners etc.

Logistics

- Room reservation
 - Contact Director of Student Affairs (Amy Hornstein) or Student Services Coordinator (Kate Blumberg) for on and off-campus room reservations.
- Parking

- Contact Director of Student Affairs (Amy Hornstein) or Student Services Coordinator (Kate Blumberg) to reserve campus parking lots and to discuss how and when participants will pay for parking.
- Permits
 - Contact Director of Student Affairs (Amy Hornstein) or Student Services Coordinator (Kate Blumberg) to complete alcohol, food and fire permits if needed.
- Catering
 - Caterers must have insurance on file. Contact Director of Student Affairs (Amy Hornstein) or Student Services Coordinator (Kate Blumberg) for a list of already insured caterers. They can also advise you on requesting insurance information from new caterers.
- Facilities
 - Meet with Facilities Manager to review facilities needs and any special requests.
- Equipment/Bus Rental
 - Contact Director of Student Affairs (Amy Hornstein) or Student Services Coordinator (Kate Blumberg) for table, chair, canopy, bus or any other rental needs.
- Security
 - Contact Director of Student Affairs (Amy Hornstein) or Student Services Coordinator (Kate Blumberg) to reserve security guards.
 - You may want to consider hiring a security guard if you will be leaving equipment at your conference place overnight.
- Custodial Service
 - Contact Director of Student Affairs (Amy Hornstein) or Student Services Coordinator (Kate Blumberg) to coordinate clean-up throughout the day and after the conference.
- Media Services
 - Contact Director of Media Services (Dana Lund) to discuss media needs at least two months before the conference.
- Registration
 - Print nametags for all participants.
 - Have programs, alphabetized nametags, extra blank nametags, promo items, pens, paper, tape, scissors and business card holder on registration table.

Post Conference

- Send thank you notes to speakers, panelists and volunteers.
- Save all documents to shared drive.
- Complete budget reconciliation.

- Select new conference chairs if you will be having the conference again and notify Student Services.
- Make sure that those authorized to sign checks are updated.
- Set up a debrief meeting with Director of Student Affairs with one month (Amy Hornstein.)
- Update Alumni Relations, Marketing & Communications and Career Services with a final list of alumni and recruiter attendees.
- Update Associate Director of Corporation & Foundation Relations (Halina Avery) with final sponsorship list.
- Take website off-line or update the information.