

## *How to Plan a Conference*

The student chairs for the ABC and WIL conferences should contact Faye Lawson, [lawson@haas.berkeley.edu](mailto: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](mailto:amyh@haas.berkeley.edu) and Kate Blumberg, [blumberg@haas.berkeley.edu](mailto: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 (Melissa Raz) to begin targeting potential sponsors.
  - Contact the appropriate Account Manager in CSO for recruiters' contacts.
  - Provide Associate Director of Corporate & Foundation Relations (Melissa Raz) 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 Assistant Director of Student Affairs (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 Assistant Director of Student Affairs (Kate Blumberg) for on and off-campus room reservations.
- Parking

- Contact Director of Student Affairs (Amy Hornstein) or Assistant Director of Student Affairs (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 Assistant Director of Student Affairs (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 Assistant Director of Student Affairs (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 Assistant Director of Student Affairs (Kate Blumberg) for table, chair, canopy, bus or any other rental needs.
- Security
  - Contact Director of Student Affairs (Amy Hornstein) or Assistant Director of Student Affairs (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 Assistant Director of Student Affairs (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 (Melissa Raz) with final sponsorship list.
- Take website off-line or update the information.