

Conference Planning Checklist

<p style="text-align: center;">9 months prior to Conference:</p> <ul style="list-style-type: none"> ○ Seek co-sponsorship w/ other clubs ○ Prepare a planning calendar ○ Recruit volunteers ○ Consult with Amy Hornstein & Kate Tobias, re: keynote speakers, marketing & sponsorship (they will refer you to Marketing, Alumni and Development offices) ○ Review fundraising guidelines on the MBA Program Website ○ Review archived materials and conference debrief from last year's conference ○ If you do not have a checking account for the conference, consider opening one. Consult with Amy and Kate for assistance 	<p style="text-align: center;">6 months prior to Conference:</p> <ul style="list-style-type: none"> ○ Send target sponsorship list to Kate Tobias & Amy Hornstein & the appropriate Career Management Account Manager for approval ○ Begin sponsorship outreach process with a tracking system in place ○ Send "Save the Date" to Dean/VIP/Senior Administrators ○ Discuss logistics with Amy Hornstein or Kate Tobias ○ Notify Dana Lund in Media Services of preliminary plans ○ Write a message platform or conference theme ○ 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"> ○ Consider meeting with Career Management, re: networking opportunities ○ Continue fundraising ○ Create a website (consult with Kate Tobias & Amy Hornstein if needed) ○ Work with Kate Tobias, re: catering, rentals & special needs ○ Consult Admission, re: prospective student involvement 	<p style="text-align: center;">4 months prior to Conference:</p> <ul style="list-style-type: none"> ○ Set an invitation deadline ○ 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"> ○ Update website ○ Work on invitations and publicity materials ○ Send save the date to potential attendees 	<p style="text-align: center;">2 months prior to Conference:</p> <ul style="list-style-type: none"> ○ Design a printed program or program app ○ Update website/registration/payment information and launch registration ○ Order gifts for speakers ○ Contact Dana Lund, re: Media Services details ○ Confirm conference is on the Dean's calendar
<p style="text-align: center;">1 month prior to Conference:</p> <ul style="list-style-type: none"> ○ Utilize MBA Alert and other Haas newsletters to publicize ○ Send announcement to Faculty ○ Invite alums ○ Finalize printed materials & website ○ Prepare Conference Committee Schedule ○ Notify speakers of allotted time and preferred talking points ○ Prepare student introductions & speaking points ○ Invite senior administrators to conference ○ Finalize media, equipment & catering needs ○ Send email invitations ○ 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"> ○ Finalize method of payment for vendors ○ Finalize ordering equipment ○ Coordinate clean-up/custodial work orders/facilities with Kate Tobias ○ Print program or launch program app

<p style="text-align: center;">2 weeks prior to Conference:</p> <ul style="list-style-type: none"> ○ Finalize set-up times & specifics with Media Services ○ Final email reminders ○ Prepare all gifts & cards ○ Schedule promotional item/gift pick-up with Alumni office ○ Contact Ute Frey, re: Media Advisory 	<p style="text-align: center;">1 weeks prior to Conference:</p> <ul style="list-style-type: none"> ○ Provide the Dean with talking points and bios ○ Finalize the Conference Committee Schedule ○ Finalize registration list ○ 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"> ○ Final committee meeting to review schedule ○ Meet with Media Services ○ Finalize logistical details for speakers (parking permits, directions) ○ Create table tents for panelists ○ Print nametags for all registrants ○ Create signage ○ Final advertising push ○ Adjust catering numbers ○ 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"> ○ Arrive at least two hours prior to the conference ○ Set up registration table ○ Drape club or Haas banner on registration table ○ Give registration volunteers check-in procedures ○ Post easels and signage directing guests to event location and parking ○ Check media in each room ○ Check room set-ups ○ Have greeters at key locations ○ Escort all speakers throughout the day
<p style="text-align: center;">Post Conference:</p> <ul style="list-style-type: none"> ○ Send thank you notes ○ Save all documents for next year's team ○ Set up a debrief meeting with Amy Hornstein & Kate Tobias (within 1 month) ○ Provide Alumni Relations, Marketing & Communications and Career Services with final list of alumni & recruiter attendees ○ Provide Kate Tobias and CMG with final sponsorship list ○ Reconcile budget ○ Take website off-line or update ○ Select new conference chairs and provide new contacts to Amy Hornstein & Kate Tobias ○ 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>

Contact with the Dean & Senior Administrators:

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

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:

Sherrell Gordon (sherrell@haas.berkeley.edu) 642-9106

Central Campus/Off-Campus Reservations:

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