



## Conference Guide

### 1. Set-up Your Conference Team

For best results, students should **start planning a minimum of 8-12 months in advance**. Having dynamic and important speakers can make your conference a huge success! With this in mind, **high-profile speakers tend to book their schedules 6 to 12 months in advance**. Additionally, venue selection is likely to be limited if you wait, so make sure you find the best location early!

The key to a successful conference is assembling a strong executive committee comprised of dedicated, hardworking people. Select the VPs right away and ask the VPs to choose their team immediately thereafter. **Don't forget to recruit Wharton undergraduates!** Wharton undergraduates often have amazing contacts, are very helpful in marketing the conference to a wider audience and are a tremendous source of talented and energetic labor.

Possible offices (and subcommittees) that you may wish to fill include:

- **Marketing**
  - **Director of Student Relations:** Motivates students to attend the conference. Duties include stuffing mail folders with announcements, sending e-mails to the Wharton community, affixing posters around Wharton, and publicizing the conference to local and regional universities.
  - **Director of University Relations:** Encourages involvement among Penn constituencies by placing ads in the Daily Pennsylvanian, contacting other graduate schools, GAPSA, etc.
  - **Director of Community Relations:** Contacts local groups outside the University community, such as the Philadelphia Chamber of Commerce, business councils, consulates, local businesses, etc.
  - **Director of Alumni Relations:** Liaises with Alumni Affairs to encourage alumni to participate as speakers, panelists and attendees.
  - **Director of Public Relations:** Liaises with the Wharton Communications Office to encourage media coverage. Writes articles for the Wharton Journal and other Penn publications.
  - **Director of Website Development:** Oversees the design, development and maintenance of the website, including on-line registration.
  - **Director of Promotional Materials:** Oversees design and production of programs, posters and flyers.
  - **Director of Sales:** Oversees ticket sales including recruitment and scheduling of volunteers to sell tickets and reserving space to sell tickets.
- **Corporate Relations:** Secures and monitors sponsorships commitments until all have been confirmed and collected. Also responsible for confirming names of sponsor attendees, obtaining sponsors' logos, banners, posters and giveaways, and for sending out thank-you letters.
- **Treasurer:** Creates conference budget, handles all deposits and vendor payments and keeps chair informed of conference's financial status.
- **Logistics:** Coordinates all pre-event and on-site services at venue (including food and beverage, audio visual, registration, name tags, name tents, speaker gifts, and clean-up after the conference such as mailing back collateral materials to companies, etc.).
- **Content:** Supervises selection of panel topics and oversees the work of the panel directors.
  - **Panel Directors:** Act as the point persons between the speaker and the conference; request speaker photos and bios; coordinate all travel arrangements with speaker; and send written thank-you notes.

### 2. Create a WebCafe and Schedule Regular Planning Meetings

In light of the large number of people and tremendous amount of work involved in organizing a conference, you may want to use webCafe to facilitate communication among the organizers. **Meet with past conference organizers**

**ASAP to complete the transfer of all useful information and documents from the prior conference.** There is most likely a WebCafe from the previous conference – make sure you get access to all of this information!

### 3. Select a Date and Venue

Selecting a date and venue that does not compete with other Wharton conferences is integral to the success of your conference. Plan ahead with the Conference Coordinator to make sure that the date and venue you choose highlights the importance of your conference. Not competing with other conferences and avoiding a “bad” date will assure of this!



See *Inside Wharton*: [http://inside.wharton.upenn.edu/eventplanning/establish\\_location.html](http://inside.wharton.upenn.edu/eventplanning/establish_location.html)  
-This has .pdf's needed for security, catering, alcohol, etc.  
-Has a guide for finding a venue for your conference.

### 4. Budget and Contracts

Because all student conferences are held under the auspices of the WGA, which is an independently incorporated 501(c)(3), almost all the services you will pay for are tax-exempt. You can find the WGA's "Pennsylvania Exemption Certificate" form in the SPIKE conference .pdf files. We also suggest that you familiarize yourself with the "WGA Treasury FAQ".

Make sure that you **do not sign any contracts until they have been reviewed by the Conference Coordinator** (and Penn's Risk Department, especially if the contract specifies any insurance requirements).

**Food and audio visual expenses can cost much higher than you expect. Audio visual (AV) costs are very high, far more costly than you would ever imagine. The expense can easily run into the thousands of dollars.** Get several written quotes for all AV costs before your event so that you can get your best deal!



See *Inside Wharton*: <http://inside.wharton.upenn.edu/eventplanning/budget.html>  
-Has a budget checklist, template, guidelines for Alcohol/Food & AV.

### 5. Develop a Theme and Panel Topics

Select a theme that highlights the educational objective of the conference. This will make it possible for you to invite speakers appropriate to the theme of the conference and the particular panels. The Wharton School's high academic reputation should be reflected in the quality of the speakers and the depth of discourse that occurs during your conference. Your conference has the Wharton name behind it and therefore needs to reflect this positively!



### 6. Invite Speakers and Panelists

See *Inside Wharton*: [http://inside.wharton.upenn.edu/eventplanning/confirm\\_speakers.html](http://inside.wharton.upenn.edu/eventplanning/confirm_speakers.html)  
-Speaker, Deputy Dean & Dean request forms.  
-Tips for finding relevant speakers.

Once a speaker/panelist has been confirmed, request a bio and .jpg photo from the speaker. **Speaker bios should not exceed 150 words in length.**

Also remember to follow up with the speakers regularly regarding their needs, travel arrangements, etc! You do not want the speaker to feel that he/she has not been the most important part of the conference! Remember that speakers are extremely busy people who have taken the time out of their busy schedule to participate in your conference. **You will not only reflect The Wharton School, but future Wharton students that may want to work for the speaker's company down the road!**

### 7. Helpful Hints When Soliciting Funds

- Ask early. Many companies make their sponsorship decisions between May and July.
- Create an attractive list of benefits.
- Include any marketing materials, e.g. past brochures, articles, website addresses, etc., with your solicitation letter. Sell your conference as the hottest event on campus/in Philadelphia!
- **Leverage any student contacts that you may have.** Remember -- most sponsorship funds come from the company's recruiting budget. Ask second years to solicit funds from their summer employers – this usually is the most effective strategy to secure sponsorship monies!
- Follow up! Recruiters are very busy people and your request for funds is probably low on the totem pole. Companies are most likely interested in learning about sponsorship opportunities, but may need to be reminded that a response would be appreciated.

### **Working with Wharton Corporate and Foundation Relations (CFR)**

Wharton CFR's primary goal is to raise money for The Wharton School. However, CFR staff members will also be available to help guide conference chairs about fundraising and may be able to connect you with companies or organizations that have expressed interest in a certain area.

**100% of the sponsorship payments made directly (e.g., via check or wire) to the "Wharton Graduate Association--For the Benefit of (Conference Name)" will accrue to the conference. 80% of sponsorship payments made to your conference via the University of Pennsylvania or Wharton CFR will accrue to the conference.** This is because the University assesses a 20% overhead fee. (This is a fee charged by Penn to all schools on all funds. For example, Penn deducts 20% of your tuition fees before giving the rest to Wharton for its own budget.) Certain corporations, especially if they have a foundation, will direct a lump-sum amount to Wharton CFR with instructions about how they want the money divided up between various Wharton initiatives. This is the case for Merrill Lynch and Citigroup for example.

Sponsorship monies made directly to the WGA should be directed to:

Conference Coordinator  
 MBA Program Office  
 The Wharton School  
 University of Pennsylvania  
 300 Jon M. Huntsman Hall  
 3730 Walnut Street  
 Philadelphia, PA 19104-6340

### **Other Resources**

Don't forget to tap into university-allocated funds. The first stop is **GAPSA** (Graduate and Professional Student Assembly). This is the organization that represents all graduate students. Grants awarded range from \$500 to \$3,000. You can get more information and submit the grant request online at [www.gapsa.upenn.edu](http://www.gapsa.upenn.edu). Certain centers and institutes may also be interested in supporting your conference. For example, the Center for African Studies, Small Business and Development Center, etc. have partnered with Wharton conferences in the past.

## **8. Website**

Planning a conference entails designing a website, posters, flyers and a brochure. Having attractive, mistake-free marketing materials is essential to the successful branding of your conference. Therefore, it is imperative that publications be proofread very carefully to avoid mistakes. Have others read it over also!

### **Website Development**

The conference website is the easiest way for people to obtain information about your conference. Create a homepage as quickly as possible and add information to it as soon as that information becomes available. Links to past conferences' website are helpful in marketing the current year's event.

## **9. Online Registration and Ticket Services**

Most of your attendees will register online during the two weeks just prior to the conference.

- For on-line registration we suggest you use The WGA Store, 123signup.com or Acteva.com.

## 10. Marketing

See Inside Wharton: <http://inside.wharton.upenn.edu/eventplanning/publicity.html>

### Print Materials

The most time consuming project is creating the program. You will need to draft and/or edit panel descriptions, a welcome letter from the Dean and speaker bios. The legwork can be tremendous since you may have to contact speakers and sponsors several times. **Your goal should be to have the bulk of the program finalized a month in advance of the conference.** Most designers will be able to make changes, for a reasonable fee, as long as the layout of brochure isn't drastically altered. As for the print job, most printers can complete the job if given 7 –10 business days, however, there may be a premium fee placed on short turnaround jobs. Some things to keep in mind:

- All digital photos should be in .jpg format.
- Sponsor logos should be in .eps format.
- If you're unsure about additions to the program such as speaker bios, ask the designer to create placeholders for you. Creating placeholders is a lot cheaper than asking the designer to revamp the layout.
- Print cost depends on the cut of the brochure and the number of colors used. Black and white is the cheapest; 4 colors are the most expensive.
- Print cost also depends on turnaround time.
- Many of the costs related to printing are fixed. Hence there may only be a slight cost differential between printing 1,000 and 1,500 brochures. However, once a job is on press, there is no turning back...therefore, **proofread everything carefully before going to press.**
- Be sure to check on guidelines for the use of the Wharton Logo.

See Inside Wharton: <http://inside.wharton.upenn.edu/eventplanning/branding.html>

- Policies on branding your event.
- Branding kit details.

**Do not underestimate the amount of time required to design, compose, edit, proofread and print marketing materials.** Although you will retain a vendor to design the materials, you will still need to provide the designer with content and exchange proofs several times before the final draft is completed. **Keep in mind also that you will need to collect and edit speaker bios and sponsor ads from many sources.** Printing the materials usually takes 2 weeks. **Aim to have all content to the designer a minimum of one month prior to the conference date.**

## 11. Sponsors

Sponsors are your best friend! Honestly, they are financing your conference! Therefore, you need to make sure that you keep your sponsors happy. Here are items you should be sure to discuss with your sponsors.

- Request sponsor logos in .eps format immediately. You will need these files if you intend to place the sponsor's logos on the self-mailer, banner, program, t-shirts, etc. It is better to ask for them early on.
- Send the sponsors ad specifications for the program. Ask your designer for ad specs and for the format requirement, e.g. film, digital file, black/white or color etc.
- In most cases, sponsors request that a representative from their company participate in one of the panels in return for sponsorship. Confirm with the sponsors regarding company reps and make sure you obtain the rep's bio and photo. Also send them all pertinent information regarding agenda, hotel, logistics, etc. **Sponsors habitually complain that they are left in the dark until the last minute.**
- Ask the sponsor if they have a banner or poster they'd like to send.
- **Ask the sponsors if they would like to give any promotional items away, e.g. folders, pens, bags, etc.**

### Final Steps

Visit the Inside Wharton website to look over a checklist, day-of & post-event guides.

See Inside Wharton: <http://inside.wharton.upenn.edu/eventplanning/>

**Good Luck! Do not hesitate to contact your Conference Coordinator for guidance or questions!**