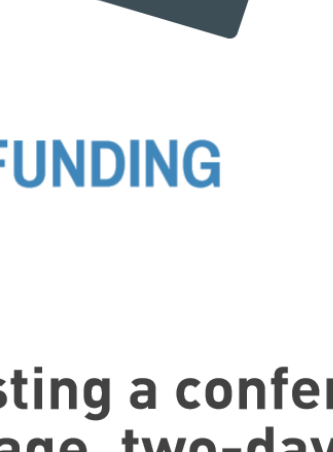


HOSTING A STUDENT CONFERENCE

Conferences at Penn: 101

If you are a student organization or a group of students (undergraduate or graduate) hoping to host a conference at the University of Pennsylvania, take some time to familiarize yourself with the essential components of making your conference a success. Conferences hosted by Academic departments should follow departmental processes though you are welcome to use this website as a resource in your planning. If you are a student organization associated with a school (e.g. Wharton, Engineering, Nursing or College), you should meet with a school staff member to discuss your conference plans. All student organizations are strongly encouraged to meet with a staff member in the Office of Student Affairs for guidance and support.

The Essentials



- ✓ Funding
- ✓ Conference Sponsor (For non-SAC funded or non-GAPSA funded groups)
- ✓ Venue
- ✓ Awareness of relevant University processes/policies
- ✓ Complete Conference Checklist

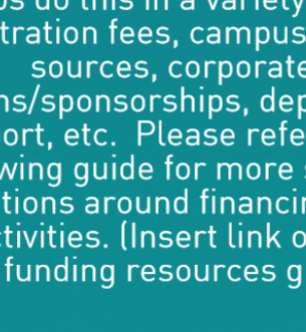
01 FUNDING

Hosting a conference is an expensive endeavor. On average, two-day, mid-sized (40-80 attendees) events planned with minimal expenses can cost organizations anywhere from \$10,000-\$15,000. This includes catering, venues, security, technology, etc. As such, this is not an endeavor that should be taken on lightly.

01 FUNDING

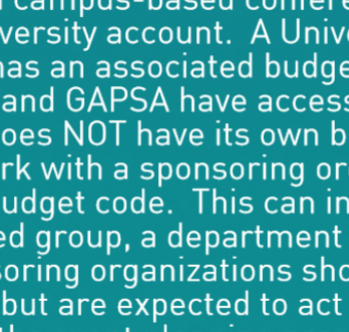
There are two primary components related to funding which greatly impact your conference:

SECURING FUNDS



Groups do this in a variety of ways: Registration fees, campus funding sources, corporate donations/sponsorships, departmental support, etc. Please refer to the following guide for more specific expectations around financing student group activities. (Insert link or hyperlink to funding resources guide)

DEPOSITING FUNDS



All funds for a campus-based conference need to be placed in a University account. A University Account is a fund which has an associated budget code. Groups funded by SAC and GAPSA have access to these codes. If your group does NOT have its own budget code, then you MUST work with a sponsoring organization who does have a budget code. This can include a SAC or GAPSA funded group, a department or a center on campus. Sponsoring organizations should not be added solely in name but are expected to act as true partners in the event planning process.

02 Info for Conference Sponsors/Sponsoring Organizations:



When student organizations or groups of students come together to host a conference, they can reach out to campus departments, centers and academic units for support. Often these requests are purely financial. As such, a group may ask you to serve as a Conference Sponsor. This role may include, but is not limited to, any of the following:

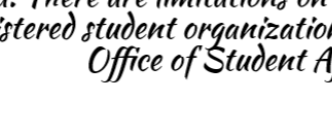
- Use of a University Budget Code associated with your unite. This includes supporting the business operations which flow through this account (paying honorariums, travel, catering, personal reimbursements, ticket sales, donations, etc)
- Regular meetings to discuss conference planning progress and to update on any relevant University policies affecting the conference. Guidance on this process can be found in the Office of Student Affairs.
- Being on site at the conference to serve as a professional resource.

To discuss the role further and any responsibilities & risks associated with it, please contact the Office of Student Affairs.

03 Venue

Space is limited on campus so before your group commits to hosting a conference, you must have a CONFIRMED space reservation for an appropriately sized campus venue. Campus venues are reserved through a variety of processes and each facility varies in what expenses it charges student organizations. If you need more guidance on this, please reach out to the Office of Student Affairs.

04 Relevant University Processes/Policies:



The specifics of these policies may vary based on the facility in which you are hosting the event, by the expectations of your Sponsoring Organization or by the school in which your organization is based. You are strongly encouraged to meet with a representative from the Office of Student Affairs to discuss the specifics of your conference and which policies you should follow:

- Events must have a demonstrated value to the University community. This may be in the form of education or community building. However, an event that is purely focused on participation from attendees outside of Penn may not be an appropriate fit as a student run conference.
- Use of University name & Insignia: There are limitations on how and who can use Penn's name. If you are not a campus department or registered student organization, you will need to discuss the further with the Office of Student Affairs.
- High profile speakers, government officials, and dignitaries often require additional University resources to ensure their visits are successful. You should be prepared to disclose the names of all speakers you are considering inviting PRIOR to issuing those invitations.
- Media invitations should be thoughtfully considered before they are issued. Not all attendees or speakers are comfortable with media presence.
- Political events on campus are guided by a special process as dictated by Penn's status as an educational non-profit institution. More info can be found on the OSA website.
- All funds secured for the conference (registration fees, donations, advertising sales, etc.) must be deposited in an University account. All expenses for the conference must also be accounted for through this same University account.
- Appropriate security (Determined in conjunction with the event facility and Public Safety) is required and the responsibility of the organizing group to finance.
- Penn students are responsible for their guests while on campus. If your conference requires students to host attendees (on or off campus), all hosts should be reminded of this responsibility.
- An event management meeting, with all facilities and event organizers, should be held two weeks in advance of the conference date. This should be organized by the student organizers of the conference.

The Conference Planning Checklist listed below is intended to provide guidance and structure to the process. Please set up a meeting with an OSA staff member to discuss expectations and clarify questions.

Conference Planning Checklist

Do

6+ Months in Advance

- ✓ Thoroughly read the Hosting a Student Conference web resource
- ✓ Identify the group of students who will be organizing and planning the event.
- ✓ Submit a reservation for preferred dates at preferred venues
- ✓ Create a budget including anticipated expenses and funding.
- ✓ Brainstorm a list of speakers, panelists, etc. you would like to invite.
- ✓ Determine if your group has access to its own budget code OR if you will need to work with another group, department, or center in order to facilitate financial transactions.
- ✓ Set up a meeting with an organizational advisor in your school or the Office of Student Affairs to discuss your conference proposal and plans.
- ✓ Begin securing funds to support the event.

Do

3-6 Months in Advance

- ✓ Should have confirmed the space reservation at this point.
- ✓ Define the roles and responsibilities of student planning committee.
- ✓ Begin promoting conference to constituency (assuming venue and funding sources are confirmed).
- ✓ If online registration is required, make sure all registrations are processed through a Penn-approved event site (OSA can recommend) and all monies go to appropriate University budget.
- ✓ Continue to update program partners/appropriate offices about any speak invitations which are have/been accepted.
- ✓ Continuously update budget reflecting quotes, expenses paid, income received, etc. Critically consider current budget vs. initial budget.
- ✓ Compile a list of technical needs for your event. (projector, screen, microphones, etc.)
- ✓ Begin to discuss the role of media at your event. Will non-Penn sources be present at your event.
- ✓ Begin to gather info regarding security requests of confirmed speakers, dignitaries, and/or government officials.
- ✓ Provide info to attendees about overnight accommodations if necessary (local hotels, campus housing, etc.)
- ✓ Gather quotes for any meals which will be catered on campus.
- ✓ Make sure any contracts which need to be signed are routed to the appropriate University office for signing. (Students should NEVER sign contracts.) OSA can provide assistance with this.

Do

1-2 months in Advance

- ✓ Confirm with venue what additional info they need/still need from you.
- ✓ Confirm with all vendors the location, dates, & times of the various events they are supporting. Determine what their needs are from you.
- ✓ Follow up on any committed funding which has not yet been transferred to your University account.
- ✓ Update any event partners/advising offices on status of the event. What questions do you have? Budget?
- ✓ All payment paperwork for food orders, promotional items, office supplies, apparel, etc. should be complete and submitted to your group's financial advisor/your supporting departments financial administrator.
- ✓ Confirm registration of attendees and provide reminders on relevant info. (schedule, attire, traveling to campus, last min cancellations, etc.)

Do

The Final Weeks

- ✓ Continue to follow up on any loose ends (money, contracts, etc.)
- ✓ Schedule a final meeting with all event partners to run through final event details.
- ✓ Confirm final list of all speakers and high profile attendees. Be prepared to share any security requests made by those individuals.
- ✓ Make advising office aware of any media which will be present.
- ✓ Continue to stay on top of budget, making adjustments where necessary.
- ✓ Have a final head count of participants (including your planning committee)

Do

Day of the Event

- ✓ Make sure all volunteers are clear about their roles and responsibilities.
- ✓ Share cell phone numbers of appropriate student planners with any vendors making deliveries, providing services, & speakers participating in event.
- ✓ Connect with any on site venue managers prior to start of event. Introduce yourself and be courteous when making requests for changes or additions to your event. Ensure they know who from your group to contact if they have questions.
- ✓ Have an easily identifiable area for conference check-in and questions from participants.
- ✓ If using multiple campus venues, make sure participants have info about how to navigate campus.

Do

Following the event

- ✓ Schedule an event debrief with planning committee and with any event partners (can be separate meetings) to learn what was successful and what can be improved.
- ✓ Determine what event expenses still need to be paid and what event funding still needs to be transferred to University account.
- ✓ Thank your planning committee/campus partners who assisted in making a successful event.
- ✓ Pull together all event planning documents and put them in a central location to be shared with next year's planning committee.



Resources/Guidelines for Funding

Common Funding Application (primarily for Undergraduate Organizations)

<http://pennusa.org/resources/common-funding-application/>

Graduate & Professional Student Association (GAPSA) funding for groups

<http://www.gapsa.upenn.edu/groupevent-funding>

Academic Theme Year Grants

<https://www.nso.upenn.edu/theme-year-2016-year-media/year-media-grants>

Fundraising Guidelines for all Student Groups:

<http://provost.upenn.edu/policies/pennbook/2013/10/17/fundraising-guidelines>



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