

# **New Club Officer Training**

## **Conference Planning**

**Spring 2011**

# Congratulations on your election!

You now have the opportunity and  
responsibility to shape student life  
at Columbia Business School.

# Who are Your Constituents?

- Your club members
- Columbia Business School alumni
- Corporate Partners
  - Sponsors
  - Speakers
  - Recruiters
- Professionals

# How Do I Leverage CBS Resources?

The Conference Advisement Team

[conferenceadvising@gsb.columbia.edu](mailto:conferenceadvising@gsb.columbia.edu)

- Student Affairs, Uris 105

Jilliann Rodriguez [jr2082@columbia.edu](mailto:jr2082@columbia.edu)

Jaime Wendel [jdjw2152@columbia.edu](mailto:jdjw2152@columbia.edu)

- Corporate Relations, Off campus

Casey Collier [coc2105@columbia.edu](mailto:coc2105@columbia.edu)

- Alumni Relations, Off campus

Jenn SanClements [js3605@columbia.edu](mailto:js3605@columbia.edu)

- Career Management, Uris 206

[Careermanagementcenter@gsb.columbia.edu](mailto:Careermanagementcenter@gsb.columbia.edu)

# What does OSA do?

## **Jilliann Rodriguez**

Director, Student Life  
212-854-5934

[jr2082@columbia.edu](mailto:jr2082@columbia.edu)

## **Jaime Wendel**

Student Affairs Officer  
212-854-5562

[jdw2152@columbia.edu](mailto:jdw2152@columbia.edu)

- Coordinate scheduling of conferences
- Logistical support
- Finances/budget review
- Recommended vendors
- University resources

**Always start with Student Affairs**

# What Does Corporate Relations do?

## **Casey Collier**

Associate Director, Corporate and Foundation Relations

212-851-4304

[coc2105@columbia.edu](mailto:coc2105@columbia.edu)

- Information on past sponsorship of your conference
- Samples of solicitation letters and pitch books
- Contact info for representatives at selected companies
- Can support you in managing Corporate Sponsors
  - Invoicing sponsors
  - Ensuring receipt of funds
- Please contact Casey before soliciting companies for sponsorship

# What Does Corporate Relations do?

## Corporate Partners Program

- Companies that have donated at least \$5,000 to the School
- Approximately 180 companies
- <http://www4.gsb.columbia.edu/corporate/partners/partners>

To contact **Corporate Partners** approval must be secured through External Relations (Casey Collier)

# What Does Alumni Relations Do?

## Jenn SanClements

Associate Director, Young Alumni Student Relations

212-854-4305

[js3605@columbia.edu](mailto:js3605@columbia.edu)

- Manages speaker approval process
- Helps student clubs identify potential keynotes/panelists
- Provides alumni contact lists
- Manages approval of letters/invitations/programs to alumni
- Coordinates conference marketing efforts to alumni

**Please contact the conference advising team before inviting keynotes or panelists**



# Selecting Keynotes and Panelists

- Provide conference details
- Request industry specific lists and keynote/panelist suggestions within required timeframe
- Keynote and panelist requests must be submitted to the Conference Advising Team at:  
[conferenceadvising@gsb.columbia.edu](mailto:conferenceadvising@gsb.columbia.edu)
- All keynote and panelist submissions must be submitted in the standard template (provided by conference advising)

# Keynote Approval Process

A conference keynote approval process has been developed to provide consistency to all conference organizers by having requests reviewed together

## Required

- Send 1 keynote request at a time per keynote slot.
- All invitation letters must be approved by Jenn (allow 72 hours for approval)
- Once approved, send communication via email or hard copy mail
- Notify the Conference Advisement Team when a keynote speaker has confirmed or denied invitation, or the club has moved on to next targeted speaker on approved list

# Potential speakers from the Board of Overseers

- Members of the Board of Overseers serve as an excellent source for keynote speakers
- To contact **Board of Overseers**, approval must be secured through External Relations (Jenn SanClements and Casey Collier)

## **Board of Overseers**

<https://www4.gsb.columbia.edu/about/board>

# Panelist Approval Process

A conference panelist approval process has been developed to provide consistency to all conference organizers by having requests reviewed together

## Required

- All invitation letters must be approved by Jenn (allow 72 hours for approval)
- Once approved, send communication via email or hard copy mail
- Notify the Conference Advisement Team when a panelist has confirmed or denied invitation, or the club has moved on to next targeted speaker on approved list

# Promoting your Conference to Alumni

- Alumni Relations helps promote conferences through the semi-monthly Event Round-up e-mails, alumni email lists and targeted e-mails
- Student conferences may also be promoted to alumni through social networking channels, including Facebook , LinkedIn and Twitter at the discretion of the Offices of Alumni Relations and Marketing and Communications

# Promoting your Conference to the Media

The Public Relations department represents the School to the press and is responsible for all external media coverage

- Your primary PR contact is **Keshia Mark**, Assistant Director  
212-854-7120; [klm74@columbia.edu](mailto:klm74@columbia.edu)

Keshia must also approve any branded merchandise that your club creates

- She can provide you with a high resolution logo for printed materials or merchandise

# Leverage Career Management

- Discuss ideas and industry trends for conference themes
- Brainstorm panel topics
- Educational Programming (panel moderator coaching)
- Help you reach out and maintain relationships with recruiters

Contact your club's VP of Careers or the CMC directly for your liaison's contact info

# Leverage Centers and Programs

- Remember to work directly with your center liaison on scheduling, content and outreach
- Although clubs are independent student organizations, it is in everyone's best interest to collaborate
- If you do not have this resource, remember to reach out to faculty



# Securing Conference Locations

## Lerner Hall (Roone Arledge Auditorium, Cinema, and breakout rooms)

- Advanced Calendaring *2 semesters before*
- Pre-Calendarng *1 semester before*

## Low Memorial Library

Both locations can be reserved through University Event Management ([lernerhall@columbia.edu](mailto:lernerhall@columbia.edu))

Jilliann Rodriguez and Jaime Wendel will sign off on the conference as an advisor. You must keep us in the loop during the date selection process.

# Securing Conference Location cont.

- Faculty House  
[fachouse@columbia.edu](mailto:fachouse@columbia.edu)
- Altschul Auditorium (SIPA)  
[Electronic Classroom Reservation](#)  
May require administrator assistance to book
- Casa Italiana  
Rick Whitaker ([rw2115@columbia.edu](mailto:rw2115@columbia.edu))
- Miller Theater  
[Theater Rental Form](#)

All of these event spaces charge rental fees

- Uris Hall/Warren Hall
- Off-campus locations, including local hotels

# Event Management System (EMS)

## **Courtney Hooper**

Assistant Director, Office of Student Affairs

212-854-0047

[clh2155@columbia.edu](mailto:clh2155@columbia.edu)

- Online instructions

<http://www4.gsb.columbia.edu/events/ems/instructions>

- All club officers have access through Groups Management

## **Important reminders:**

- Event approval and room assignment are two separate steps
- Even if your conference is outside of Uris, you still need to submit your event in EMS to be added to the school events calendar

# Conference Catering

## Exclusive Catering

Lerner Hall and  
Faculty House

[Columbia Catering](#)

Casa Italiana

[Sterling Affair](#)

(Peter Fazio)

## Choice of Catering

Low Library- *either use  
Columbia Catering or pay \$10 additional  
per person*

Uris Hall & Warren Hall

Any other CU Space

**Please see OSA for a list of catering vendors**

# Communication within CBS

- To promote an event to the student body use:  
[student-events@lists.gsb.columbia.edu](mailto:student-events@lists.gsb.columbia.edu)
- To request volunteers, make announcements and send other non-event email use:  
[student-bulletin@lists.gsb.columbia.edu](mailto:student-bulletin@lists.gsb.columbia.edu)
- To include the EMBA population use:  
[all-EMBA@bettyblue.gsb.columbia.edu](mailto:all-EMBA@bettyblue.gsb.columbia.edu)
- To email staff and faculty:  
[all-faculty@lists.gsb.columbia.edu](mailto:all-faculty@lists.gsb.columbia.edu)  
[all-staff@lists.gsb.columbia.edu](mailto:all-staff@lists.gsb.columbia.edu)
- Or submit an ad for the flat screens in the lobby
  - Email slides to [communications@gsb.columbia.edu](mailto:communications@gsb.columbia.edu)

# Alcohol Policy

- The Office of Student Affairs office must be notified if you intend to serve alcohol at your conference. This should be indicated in EMS, as well.
- You may only serve beer and wine at Business School events; no hard alcohol is permitted on or off campus. Student groups that wish to apply for exception must do so in writing to the Assistant Dean of Student Affairs, Nayla Bahri.
- Ample food and non-alcoholic beverages must be served and prominently displayed at any event where beer or wine is served
- All of your guests must be 21 years of age and must be able to produce identification of age if asked
- No alcohol may be served at an event that begins before 5:00 p.m.

# Requesting Dean's Office Representation

- Deans may be available to provide opening or closing remarks for your conference
- All requests for Dean's Office representation at your conference must go through the Office of Student Affairs
- Remarks Form for the Dean must be submitted two weeks (10 business days) before your conference
- Failure to submit the Remarks Form in a timely manner may jeopardize the Dean's participation in your conference for current and future years

# Conference Best Practices- Finances

- Help your VP of Finance out with the monthly account reconciliation by keeping her/him up-to-date
- Keep receipts and copies of everything
- Look in last year's club folder
- You never need to put your own cash forward if you use a pre-approved vendor or plan in advance
- Checks can take several weeks to be issued
- CU is tax exempt



# Conference Best Practices-General

- University regulations can be tricky; do your research
- NEVER sign a contract- OSA will do it on your behalf
- Follow OSA conference timelines; they will keep you on track with planning
- Create volunteer staffing sheets for conference day
- Have panel managers and a designated VIP greeter
- Make clear your attendee list sharing policy
- Green your conference

# Conference Policies

- All programs must be sent to the Conference Advisement Team for review one week prior to printing
- Clubs must have one standardized speaker request letter, approved by the Conference Advisement Team
- Conferences nametags must denote company name and alumni class years. Example: Joe Smith '09, Deloitte
- Work with Marketing and Communications to obtain written permission from speakers if you intend to videotape or post pictures of them online
- Any club officers who enter academic probation will need to step down from their role

# Conference Policies cont.

- Registration should include an option for attendees to opt out or share their contact information
- All registration pages must now include a Terms and Conditions section; registrants must indicate that they understand and accept the Terms and Conditions in order to register for the conference.
- Packages can only be stored in the Conference Storage Space for the week prior to a conference
- Items must be removed within one week of its conclusion

# Next Steps

## April

- Work with OSA to select a conference date and secure a location
- Make sure not to book against other conferences, or coordinate conference overlaps to minimize audience conflict
- Begin forming your conference team and dividing responsibilities
- Hold brainstorming sessions to conference theme, panel topics and generate a speaker wish list
- Request alumni industry lists
- Draft and seek approval for sponsorship packet and sponsorship outreach letter

# Next Steps cont.

## May and June

- Schedule meetings with External Relations and Development to learn more about the speaker and sponsorship process
- Work with Corporate Relations to send out sponsorship letters
- Begin speaker outreach
- Reach out to moderators
- Formulate a marketing plan
- Update your conference Web site as soon as details are available

# How to Program Effectively?

- TRANSITION
- GET advice
- SUBMIT conference date and secure location
- SEEK approval from administration
  - Alumni Relations for alumni participation
  - Corporate Relations for sponsorship or outreach to Board of Overseers and Corporate Partners
- EXECUTE
- FOLLOW-UP

# Questions?

The conference advising team is here to support you throughout the process

Remember to use the Club Resources site which includes an entire section for conference planning

<http://www4.gsb.columbia.edu/students/mba/beyond/resources/conferences>

Use the following e-mail to communicate with the Conference Advising team:

[conferenceadvising@gsb.columbia.edu](mailto:conferenceadvising@gsb.columbia.edu)