



**Wharton**  
UNIVERSITY *of* PENNSYLVANIA

**UNDERGRADUATE DIVISION**

# Student Conference Planning Guide

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## PRE-PLANNING

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What to consider when planning your conference and writing your proposal:

- What is the conference's purpose and why are you hosting it?
- Are there any other student organizations or departments that might want to co-sponsor the conference?
- How many speakers you will need for your event? Will you be having a keynote, a panel, and/or multiple/concurrent workshops?
- Who will your audience be? Will the conference be open to just Wharton undergraduates or will it be open to MBAs, Penn undergraduates, Penn community, general public, etc.?
- How many people might realistically attend?
- Have you researched costs, and do you have sufficient funding for the event? If not, how do you plan to raise funds?
- When choosing your date, have you considered holidays and other campus events? Be sure to check the University calendar as well as the calendar on [MyWharton](#).
- Where do you want to hold the event? What are your space needs for the conference? Do you need a rain location, audio-visual or any other set-up requirements?
- Will you be serving a meal to your conference attendees? If so, where will your meals take place?
- Do you have a realistic timeline for planning the event?

Please note that only Wharton Council-recognized student clubs and Wharton Undergraduate Division-sponsored student organizations may sponsor conferences.

## CONFERENCE PROPOSAL

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Clubs must submit a [conference proposal](#) to the director of student life for approval at *least one semester prior to the proposed event*. The director of student life will meet with the club's conference planning committee to review the proposal and discuss next steps.

## SELECTING A VENUE

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When booking your venue, be sure to inquire about estimated pricing for room rentals, housekeeping, security, technology, furniture, etc. It is recommended that you also reserve a back-up venue until your primary venue is confirmed.

### Wharton Venues

To reserve space in Jon M. Huntsman Hall, Steinberg-Dietrich Hall, and Vance Hall, review the information on the [Special Event Reservation Process](#) page and [submit a room reservation request](#). Space requests for Wharton buildings can be submitted starting on November 15 for the spring semester and April 15 for the fall semester.

After you have received a confirmation email with a Request ID number from Wharton Operations it will be time to schedule a meeting with Wharton Operations staff to review the details of your event, including room setup, classroom technology, security, catering, and housekeeping. Student clubs should designate one member to be the event host who will communicate all details to Wharton Operations.

If your event requires classroom technology, you will also need to contact the [director of student life](#) after you have met with Wharton Operations.

#### *Housekeeping policies*

- Events that meet any of the following criteria will be subject to housekeeping charges:
  - Has more than 25 attendees
  - Has food served
  - Requires special pre- or post-cleaning
  - Takes place during evening or weekend hours (when University housekeeping is not available)
- The client and/or vendors are responsible for disposing of all food, service items, and unused materials from the room prior to the end time stated on the room confirmation. Additional charges could result if the facility is not returned to its proper condition at the conclusion of the event. These charges will be billed to the budget code on the initial room request form.
- Housekeeping rates vary according to the day and time of the shift.

#### *Security policies*

- Security charges may apply for events that
  - Have more than 50 attendees
  - Occur outside of normal building hours
  - Are held on the 8<sup>th</sup> floor of Jon M. Huntsman Hall
- If an event occurs outside of normal building hours and non-Penn guests will be in attendance, you are required to submit a list of these attendees to the special events manager no later than three (3) business days before your event. Any non-Penn guest whose name does not appear on the list will not be permitted to enter the building. (Note: Per University public safety policy, all non-PennCard holders must exit all University buildings by 10:00pm regardless of whether their name appears on the list).

#### **Non-Wharton Venues**

- [Perelman Quadrangle Facilities](#), which includes Houston Hall, Irvine, The ARCH, College Hall
- [Annenberg Center](#)
- [Inn at Penn](#)
- [Sheraton University City](#)

*Note:* Students are not permitted to sign contracts; any contracts should be sent to the director of student life for signature at least one month before your conference.

#### **INVITING SPEAKERS**

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To invite any non-Wharton/Penn individuals, including alumni, to speak at your conference, you must submit your list of proposed speakers via the online [speaker request management system](#). This needs to be done *before* you send any speaker invitations out and *at least two months before* the event. Once you have been notified that your speakers have been approved, you may invite those individuals to speak at your conference.

*Note:* If you intend to invite the media to your event or capture the event in any medium (e.g., photography or video), please get approval from your speakers in advance using the [Media Release Form](#) and be sure to review the [media relations guidelines](#) before sending out any press releases.

## Inviting the Dean

You must meet with the [director of student life](#) to submit a formal request *at least two months before* your event if you would like the Dean to attend or speak. The request will then be submitted to the Dean's Office for review and confirmation. Requests will be reviewed on a first-come, first-served basis per semester.

## Speaker Gifts

Due to tax laws and University policy, you may only present your speaker with Wharton- or Penn-branded gifts for speaking at your conference (gift cards and gift certificates are not permitted). The [director of student life](#) can provide Wharton-branded pen/pencil sets for your speaker gifts.

## SELECTING A CATERER

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If you are using any Wharton buildings, you will need to use an [approved caterer](#).

If you are using a non-Wharton venue, please contact the respective facilities office or hotel event manager to inquire about catering requirements or restrictions (e.g., approved caterers) *before* you contact any caterers.

Once you determine your caterer and your catering needs, please forward all catering contracts to the [director of student life](#) who will submit the contracts to the Penn Purchasing Department for signature. Students may NOT sign contracts. You will then need to submit a purchase order request for your catering via the online PO request system *at least two weeks* before the event.

*Things to consider:* Do your guests have any dietary restrictions/needs?

## RENTING EQUIPMENT

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Will you need to rent tables, chairs, linens, or a tent for your event?

- If you are using a Wharton building, you will need to use a company from the [approved vendors list](#) (if your event is on the 8<sup>th</sup> floor of Huntsman Hall, Wharton Operations will provide tables). Also note that the Undergraduate Division has a limited number of tables and some additional equipment available for student use. See the [Equipment Request Form](#) for more information.
- If you are using a non-Wharton building, please contact the respective facilities office or hotel event manager to inquire about approved vendors.

## CREATING PROMOTIONAL ITEMS/GIVEAWAYS

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Will you be giving your attendees a memento from the event? Wharton and Penn work with many vendors that produce Wharton- and Penn-branded promotional items such as clothing, portfolios, water bottles, bags, umbrellas, key chains, etc. These vendors can also produce club-branded items. Please consult with the [director of student life](#) about these specific vendors and to discuss giveaway options.

*Note:* Vendors typically need a minimum of 2-3 weeks to produce most items. If the vendor is on the Penn Purchase Order System, you will need to submit the PO request for your giveaway purchase *at least two weeks* before the event.

## REQUESTING A/V TECHNOLOGY

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Check with your speakers to see if they have any special A/V needs for their presentations, e.g., a podium, lavalier or hand-held microphone, PowerPoint access. If you are using a Wharton venue, you will need to meet with the director of student life *at least two weeks prior* to the event to submit a request for classroom technology. If using a non-Wharton venue, contact the respective facility office or manager to secure any technology needs.

## SOLICITING CORPORATE SPONSORSHIP

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Wharton permits its student-run clubs to solicit companies for corporate sponsorship. All corporate solicitation packages must be sent to the director of student life for approval *at least three months before* any company is asked for funding.

## SIGNING CONTRACTS

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Due to University policy, *students may not sign any contracts*, e.g., hotels, catering, speakers. Please send any contracts to the director of student life for signature *at least one month prior* to the date of the conference. The director of student life will then submit the contracts to the Penn Purchasing Department for signature.

## PAYING FOR CONFERENCE EXPENSES

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There are several ways in which the Wharton Undergraduate Division can assist you with your conference payments.

**Purchase orders:** If a company or vendor is on the purchase order system within Penn, the only method of payment is a purchase order. Requesting reimbursements with any of these vendors is not permitted. Please send the contract to the director of student life *at least one month before the event so that the contract can be signed. You will then need to submit a PO request for this purchase two weeks before the event date.*

**Checks:** If a vendor requires a check, please submit the invoice and contract to the director of student life *at least one month prior to the required payment date.* Rush checks will not be provided.

**Budget codes:** If you are using an on-campus venue or vendor and they require a budget code, please send the invoice, the vendor staff member's name and email address to the director of student life, who will then email the vendor the club budget code for payment.

**Reimbursements:** If you pay for an expense out of pocket, please follow the [reimbursement instructions](#). Please note that you must file a reimbursement request *within five business days* from the date of purchase and that no reimbursements are permitted for any vendors who are in the purchase order system.

**Campus Copy:** Please request a Campus Copy code from the director of student life *at least three business days in advance.* Campus Copy can provide printing and copying services for your conference.

## SELLING TICKETS

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If you are charging for tickets to attend the conference, be sure to determine your pricing menu for Wharton/Penn students, community, etc. Within five business days after the conference, you will need to submit

all ticket revenue to the director of student life so that the revenue can be deposited into the club account within the Wharton Undergraduate Division. Please note:

- If conference attendees are writing a check for their ticket, all checks must be made payable to “The Trustees of the University of Pennsylvania.”
- If you are using an online ticket service like EventBrite, you will need to set this up through a student’s checking account. Then, once the ticket revenue has been deposited into the student’s account, that student will need to provide documentation of the deposit (e.g., an email from the ticket vendor showing the amount deposited into the student account) to the director of student life, and then submit a check in the same amount to the Trustees of the University of Pennsylvania.

## MARKETING

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You have many marketing channels available to advertise your conference:

- [Life at Wharton monitors](#) in Wharton buildings
- *Flyers, posters, and signage*
  - Flyers may be handed out on Locust Walk.
  - Nothing may be glued, taped or affixed in any way to walls, room number signs, doors, floors or ceilings.
  - All directional signage within any Wharton building hallway or lobby must use a single-base sign holder. Easels are **not** permitted
- [Daily Pennsylvanian](#) advertisement
- *Press releases/inviting the media:* Wharton Communications can help you promote your event to the media. For more information, please review the [media relations guidelines](#).

*Things to consider:* Be sure to determine what you can afford and what the best channels are for your conference. Develop a marketing plan for your conference. Also, be aware that Wharton and Penn have very strict [branding guidelines and policies](#). Please review them to ensure compliance.

## PHOTOGRAPHY

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Take photos and capture the event throughout the day, but make sure to include a media release sign at the registration table. Please ask the [director of student life](#) for a copy of this sign. Be sure to ask for permission in advance from your speakers/VIPs before you take pictures of them. Also, ask for their permission to use photos of them for future conference materials, etc.

## ALCOHOL

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Wharton undergraduate student clubs may *not* serve alcohol at events.

## SAMPLE CONFERENCE PLANNING TIMELINE

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Task	Deadline
Submit the <a href="#">conference proposal form</a> and meet with the director of student life.	One semester before
Review the <a href="#">Pre-Planning</a> section of this guide.	At least three months before
Review the University and MyWharton calendars and select a date for your event.	

Select a venue.	
Send your corporate solicitation package(s) to the director of student life.	
Submit speaker list via online <a href="#">speaker request management system</a> .	At least two months before
Meet with the <a href="#">director of student life</a> to invite the Dean to speak.	
Select a caterer.	At least one month before
Order promotional items.	
Submit any contracts to the <a href="#">director of student life</a> for signature.	
Notify your speakers if you intend to invite the media to your event.	
Collect completed <a href="#">Media Release Forms</a> from all speakers.	
Submit your draft press release to the Wharton Communications Office and the <a href="#">director of student life</a> .	
Conduct a walk-through of the venue with Wharton Operations.	At least two weeks before
Provide facilities/events manager with updated conference schedule and any delivery/pick-up needs. If the event is at an on campus venue, also provide a list of any non-Penn guests who will be attending.	
Obtain a media release sign from the director of student life if you plan to photograph your event.	
Submit all purchase order requests for your event, e.g., catering, giveaways.	
Provide all conference planners with an updated event schedule that includes room breakdown, speaker and vendor/catering contact information, set-up/clean-up times, and a list of volunteers/assignments.	Day of event
Take photos – be sure to capture the event throughout the day.	
Submit any ticket revenue to the director of student life for deposit into the club account.	Within five days after
Submit all reimbursement requests via <a href="#">Concur</a> .	
Send thank-you notes to your speakers, panelists, and VIP attendees.	
Hold a debrief meeting with your committee to determine your successes and improvement areas for next year. Make sure to keep good records for next year.	Within two weeks after

### **APPROVED CATERERS**

The Wharton Complex has approved caterers who are trained in the standards and procedures within all Wharton buildings. Only these caterers can provide food and beverage service for any event. Client is responsible for contacting caterers directly and handling all catering arrangements.



**APPROVED CATERERS**

<b>NAME</b>	<b>PHONE NUMBER</b>	<b>WEBSITE</b>
12th Street Catering	215 386-8595	<a href="http://www.12thstcatering.com">www.12thstcatering.com</a>
Aneu Catering & Events	610-251-9600	<a href="http://www.aneucateringandevents.com">www.aneucateringandevents.com</a>
Bon Appetit	215-573-0830	<a href="http://www.bonappetitupenn.catertrax.com">www.bonappetitupenn.catertrax.com</a>
Birchtree Catering	215-744-9489	<a href="http://birchtreecatering.com">birchtreecatering.com</a>
Catering By John Lowe	610-873-7229	<a href="http://www.cateringbyjl.com">www.cateringbyjl.com</a>
Chef's Table	215-925-8360	<a href="http://www.cateringphiladelphia.com">www.cateringphiladelphia.com</a>
Day By Day	215-564-5540	<a href="http://www.daybydaycatering.com">www.daybydaycatering.com</a>
DiAntonio's Catering	215-969-0656	<a href="http://www.diantonios.catertrax.com">www.diantonios.catertrax.com</a>
DiBruno Brothers	215-665-1659	<a href="http://www.dibruno.com/catering">www.dibruno.com/catering</a>
Feast Your Eyes Catering	215-634-3002	<a href="http://www.feastyoureyescatering.com">www.feastyoureyescatering.com</a>
FoodWerx/Hospitality Management	856-231-8886	<a href="http://www.foodwerx.com">www.foodwerx.com</a>
Garces Catering	215-670-2366	<a href="http://www.garcesevents.com">www.garcesevents.com</a>
Jeffrey A Miller	610-622-3700	<a href="http://www.jamcater.com">www.jamcater.com</a>
J. Scott Catering	610-725-9420	<a href="http://www.jscottcatering.com">www.jscottcatering.com</a>
Neumans Kitchen	215-709-0407	<a href="http://www.neumanskitchen.com">www.neumanskitchen.com</a>
Philadelphia Catering Co.	215-468-0518	<a href="http://www.philadelphiacatering.com">www.philadelphiacatering.com</a>
Pret A Manger	215-573-9106	<a href="http://cms.business-services.upenn.edu/dining/hours-locations-a-menus/retail-dining/pret-a-manger.html">cms.business-services.upenn.edu/dining/hours-locations-a-menus/retail-dining/pret-a-manger.html</a>
Restaurant Associates	212-613-5526	<a href="http://www.restaurantassociates.com">www.restaurantassociates.com</a>
Schulson Catering	215-330-6100	<a href="http://www.schulsoncatering.com">www.schulsoncatering.com</a>
Starr Events	267-886-1472	<a href="http://www.starrevents.com">www.starrevents.com</a>
Taste! Catering	267-265-2765	<a href="http://www.bytastecatering.net">www.bytastecatering.net</a>
Tasty Table	610-251-0265	<a href="http://tastytablecatering.com">tastytablecatering.com</a>

**SPECIALTY CATERERS**

<b>NAME</b>	<b>PHONE NUMBER</b>	<b>WEBSITE</b>
Beiler's Donuts	215-921-5874	<a href="http://www.beilersdoughnuts.com/">www.beilersdoughnuts.com/</a>
Deke's BBQ	215-588-7427	<a href="http://www.dekesbar-b-que.com">www.dekesbar-b-que.com</a>
Federal Donuts	267-275-8489	<a href="http://www.federaldonuts.com">www.federaldonuts.com</a>
Insomnia Cookies	877-632-6654	<a href="http://www.insomniacookies.com">www.insomniacookies.com</a>
Lil Pop Shop	215-222-5829	<a href="http://www.lilpopshop.com/catering">www.lilpopshop.com/catering</a>
Philly Pretzel Factory	215-338-4606	<a href="http://www.phillypretzelfactory.com">www.phillypretzelfactory.com</a>
Weckerly's Ice Cream	215-882-9958	<a href="http://www.weckerlys.squarespace.com/catering">www.weckerlys.squarespace.com/catering</a>
Spread Bagelry	215-222-0283	<a href="http://www.spreadbagelry.com/">www.spreadbagelry.com/</a>

**BOXED LUNCHES/TAKE OUT**

<b>NAME</b>	<b>PHONE NUMBER</b>	<b>WEBSITE</b>
Corner Bakery	215-349-6290	<a href="http://www.cornerbakerycafe.com">www.cornerbakerycafe.com</a>
Eatable Delights	215-236-3900	<a href="http://eatibledelightscatering.com">eatibledelightscatering.com</a>
DuJour	215-465-6680	<a href="http://dujourphilly.com">dujourphilly.com</a>
Hoagitos	732-556-6617	<a href="http://www.hoagitos.com/menu">www.hoagitos.com/menu</a>
Just Salads	212-244-1111	<a href="http://www.justsalad.com/catering">www.justsalad.com/catering</a>

Matt & Marie's / Kayu	267-563-2000	<a href="http://www.mattandmaries.com/catering.html">www.mattandmaries.com/catering.html</a>
Perfect Setting Catering	610-889-2040	<a href="http://perfectsettingcatering.com">perfectsettingcatering.com</a>

## APPROVED VENDORS

### PROMOTIONAL ITEMS

VENDOR	CONTACT	PHONE	EMAIL
4Imprint	Karla Kohlmann	866-624-3694	<a href="mailto:kkohlmann@4imprint.com">kkohlmann@4imprint.com</a>
Barash Group	Nan Barash	610-527-7266	<a href="mailto:nan@barashgroup.com">nan@barashgroup.com</a>
BDJ Ventures	Bernard Wright	215-266-2062	<a href="mailto:info@bdjventuresllc.com">info@bdjventuresllc.com</a>
BTC Envelope & Printing	Andrew Magnus	215-852-9038	<a href="mailto:andrew@thebtcsolution.com">andrew@thebtcsolution.com</a>
Club Colors	Robyn Shea	800-249-2582 x 152	<a href="mailto:rshea@clubcolors.com">rshea@clubcolors.com</a>
Crestline Specialties	Sylvia Schrock	800-221-7797 X 2756	<a href="mailto:sschrock@crestline.com">sschrock@crestline.com</a>
CustomInk	Bailey Rockwell	800-293-4232	<a href="mailto:licensing@customink.com">licensing@customink.com</a>
Geiger	Jeanne Carroll	616-316-6755	<a href="mailto:jfcarroll@geiger.com">jfcarroll@geiger.com</a>
Jaxxon Promotions	Carol Blitz	717-569-6890 X11	<a href="mailto:carol.blitz@jaxxonpromotions.com">carol.blitz@jaxxonpromotions.com</a>
Kronco.com	Mark Kronberger	215 547-6594	<a href="mailto:mark@kronco.com">mark@kronco.com</a>
LogoBranders. Inc.	Amanda Flaherty	334-277-1144	<a href="mailto:amanda@logobranders.com">amanda@logobranders.com</a>
Main Line Sportswear Specialties	John Curtin	484-597-3264	<a href="mailto:john@mainlinesportswear.com">john@mainlinesportswear.com</a>
NEU	Dan Fine	609-731-8193	<a href="mailto:Daniel.Fine@WhatsNeu.com">Daniel.Fine@WhatsNeu.com</a>
Proforma Spectrum Graphics	Susan Zambon	908-418-0351	<a href="mailto:szambon@psgnj.com">szambon@psgnj.com</a>
Promotional Marketing	Julie Wool	610-525-5950	<a href="mailto:juliezwo@outlook.com">juliezwo@outlook.com</a>
Spike's Trophies	Keith Baldin	215-574-8100	<a href="mailto:keith@gospikes.com">keith@gospikes.com</a>

### RENTALS (TABLES, CHAIRS, LINENS, TENTS)

RENTAL ITEMS	VENDOR	PHONE
Tables, Chairs, Linens	Event Rentals	856.424.0919
Tables, Chairs, Linens	Party Place	800.545.6654
Tables, Chairs, Linens	Party Rental Ltd	888.447.7672
Tables, Chairs, Linens	Perelman Quad	<a href="tel:215.898.5552">215.898.5552</a>
Tables, Chairs, Linens	Select Event Rentals	610.265.5200
Tables, Chairs, Linens	South Jersey Party Rentals	800.605.4775
Tents	Anthony Rentals and Sales	610.272.2800
Tents	Van Tent Rentals	610.495.1433