MAJOR EVENT TRAINING

FOR STUDENT ORGANIZERS OF CONFERENCES AND CASE COMPETITIONS.

APR 20 | 12:00 – 12:40 PM
STUDENT CONFERENCES COMMITTEE
SOMSTUDENTCONFERENCES@YALE.EDU
WHAT WE’RE COVERING TODAY

INTRODUCTION
THE COMMITTEE & HOW WE HELP

CONSIDERATIONS
HOW TO BE SUCCESSFUL

THE BEGINNINGS
THE BUILDING BLOCKS TO FOCUS ON NOW

ACTIONS TO TAKE
YOUR NEXT STEPS TO PLAN

YOUR TURN
Q&A | OPEN FORUM
THE STUDENT CONFERENCES COMMITTEE (SCC)

A staff committee centered on supporting your successful planning and hosting of your conference and/or case competition.

SPONSORSHIP

SPEAKERS & JUDGES

EVENT LOGISTICS

CONTENT

DIVERSITY

MARKETING & COMMUNICATIONS

PURCHASING & BUDGETING

WHO DO WE CONTACT?

Watch out for following slides for names and profiles of important departments.

Contact sheet of all SCC staff members provided at end of slide deck.
CONSIDERATIONS

What you’ll need to do, and what we expect from you.
While Gavin felt he could coordinate the conference singlehandedly, he also forgot about classes, exams, interviewing and recruiting, coordinating other club events, attending other events, sleeping, socializing, and generally not trying to break down...

...don't be like Gavin. Get your team in place ASAP!
Why do we have them?

We set core deadlines to keep you on track and making sure you’re completing major items in good amount of time. Many deadlines are tied to historical knowledge on company relationships, as well as understanding the timeframe it can take to set up items with third party vendors and other processes in Yale.
### Deadline Item

<table>
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<tr>
<th>Task</th>
<th>Details</th>
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<tr>
<td>Finalize main theme &amp; title</td>
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<tr>
<td>Submit projected budgets and projected total expenses to AASL</td>
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<tr>
<td>Set up Website/Event Registration, following Yale’s Branding and Licensing Policies</td>
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<td>Obtain approval of initial list of sponsors/speakers</td>
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<td>Confirm tentative agenda of event &amp; room bookings</td>
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<td>Confirm content outline: themes, sessions</td>
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<tr>
<td>Open event registration/website</td>
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<td>Attend a 2-month review meeting with the SCC:</td>
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<td>Confirm 75% of all corporate sponsorship needed, based on projected costs of event</td>
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<td>Confirm 75% speakers/judges, with keynote speaker(s) confirmed.</td>
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<tr>
<td>Confirm final agenda &amp; commit to final room bookings</td>
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<td>Complete all reimbursement prep forms</td>
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### HOW CAN YOU KEEP TRACK OF THESE ITEMS?

- Outlined in your Agreement Documents.
  - Email us if you haven't received or lost your copy.
- Deadlines held on your Outlook calendars.
  - Forward these on to your new leadership team.

### WHAT IF WE CAN’T MEET THE DEADLINE?

You still need to update the staff on the Outlook hold for the specific deadline, explaining why you’re delayed.

You never know, we may be able to help get you moving again – so keep communicating with us!

Speaking of communication...
KEEPING IN TOUCH WITH US

MINIMUM LEVEL:
At the deadlines, connect to the staff involved. Meet with us 4 – 6 months before the event. At the 2-month review meeting. Debrief within 1 month after the event.

WHAT WE REALLY WANT:
All the above PLUS regular updates and check-ins via email and Zoom meetings.

General inbox: SOMstudentconferences@yale.edu
WHEN IN DOUBT, TALK TO YOUR AASL LIAISONS

KIT

REBECCA & MARISA

EMILY & AMANDA
#scc-conference-organizers

A place for questions and answers. A place for collaboration. A place for you.

You’ll receive the channel soon on your dashboard. Add new team leaders as you expand your team. Does not replace email communication for submitting documents and deadlines.
WHY ALL THE MEETINGS, DEADLINES, AND DOCUMENTATION? BECAUSE WE DON'T WANT THIS TO HAPPEN TO YOU…
THE BEGINNINGS
THE IMPORTANT STARTING BLOCKS OF YOUR EVENT.
A NOTE ON COVID-19

• Plans are being made to be back in-person for Fall 2021
• Large gatherings should still expect some rules on safe gatherings under COVID.

• **What you should do:** submit your applications with the rooms you’d like (general or specific is fine.)
• Late summer/early fall: COVID guidelines expected, we’ll update you via Slack, email and a check in session in September.
• **You should plan to have a virtual/hybrid backup plan just in case!**
COVID-19 & FACILITIES

• For Fall 2021, we expect Evans Hall to be reopening for events.
• As mentioned before, nothing has been confirmed yet; approved events will be given room holds and then work with Events team based on new guidance in Fall.

RESOURCES
• COVID-19 Club Leaders Handbook Page
• Yale Event & Gatherings Requirements
• Hosting Virtual Events Handbook Page
SPONSORSHIP

• You can engage with companies for corporate sponsorship.
• Development and CDO review and approve all prospect lists and proposals before outreach – submit through CG (link below).
• Reach out to us to help develop your materials and start this process now!
• You cannot reach out to sponsors until your materials have been approved.
  • This process may take time depending on the sponsorship you are offering – so start today!

RESOURCES
• Corporate Sponsorship Handbook
• Useful Templates on the CG Handbook
• Submit your Sponsorship request through this form.
SPEAKERS & JUDGES

• Alumni Relations review and approve all speakers and judges before your start your outreach.
• Send your list to yalesomalumni@yale.edu within the deadlines.
• A final confirmed speaker/judges list should be sent to Brendan and your AASL liaison at least 1 month before your event.
• Brendan and his team can also help you leverage the alumni network for marketing of your event!

RESOURCES
• Guest Speaker Policy
• Example Speaker/Judges Outreach Tracker
BUDGETING & FINANCES

• The BusOps team help with the processing of purchasing and reimbursements.
• They also assist with prize money payouts if you are running a case competition.
• Conferences can only use their external COA account.

RESOURCES
• Portal Page on Purchasing & Reimbursements.
• The Finances Pages on Student Org Handbook.
• Example Budget Tracker Template
• Use of Yale or SOM logo and typeface needs prior approval on any materials or digital presence.
  • Email Ben.Mattison@yale.edu with your logos/graphic designs for approval.
• “Hosted by the XYZ Club at Yale SOM” must be on all materials and web designs.
• The communications team can also help you with other areas of marketing and publicizing your event. Check the links below!

RESOURCES
• Marketing Your Event Information
• Example Marketing Outreach Planner
• Submit a JIRA ticket: som.comms@yale.edu, or https://jira.som.yale.edu/servicedesk/customer/portal/4
ACTIONS TO TAKE
THE NEXT THINGS TO DO IN PLANNING YOUR EVENT.
THINGS TO WATCH

DO SOME RESEARCH: Review the Student Leaders Handbook for information, useful templates, and video tutorials.

CONNECT NOW WITH US: Your AASL liaison will soon be connecting with you to schedule a quick check-in. Make sure the majority of your leadership team can attend.

KEEP AN EYE OUT: Keep checking your Outlook calendar for upcoming deadlines, and connecting with the staff involved in each deadline.

UPDATE US: Let us know your new leadership team, and keep in touch as new updates come in – a quick two sentence email will suffice, no need for an essay!
Above all though for right now...

**Complete the application by Wed April 21, 11:55 PM EDT!**

http://cglink.me/2eF/s17786
YOUR TURN
Q&A

Unmute, raise hand, we don’t care just ask your questions!