



DOCTORAL PROGRAMS

Student Event Planning Guide

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CONTENTS

Selecting a Venue3

Selecting a Caterer4

Renting Equipment.....4

Creating Promotional Items/Giveaways.....4

Requesting A/V Technology.....4

Paying for Expenses.....5

Alcohol.....5

Approved Caterers & Vendors.....8

Approved Vendors.....8

Planning Your Conference.....8

Pre-Planning.....8

Conference Proposal.....8

Selecting a Venue.....9

Inviting Speakers.....9

Signing Contracts.....9

Selling Tickets.....9

Marketing.....10

Photography.....10

Sample Conference Planning Timeline.....10

PLANNING YOUR EVENT

SELECTING A VENUE

When booking your venue, be sure to inquire about estimated pricing for room rentals, housekeeping, security, technology, furniture, etc.

Wharton Venues

To reserve space in Jon M. Huntsman Hall, Steinberg-Dietrich Hall, and Vance Hall, you will need to complete submit a room request via Wharton SPIKE.

To request a room:

1. Go to Wharton SPIKE - <https://spike.wharton.upenn.edu/>
2. Click Calendar tab
3. Click Submit New Event and select PHD category to select your group
4. Click Save Event & Continue to Room Request

If your event requires classroom technology or catering or will have costs associated with housekeeping or security, you will also need to contact the Doctoral Programs office after you have met with the special events manager. The Doctoral Programs office will provide the budget code and/or a purchase order if necessary.

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. For an estimate of these charges, please contact the Wharton Operations special events manager.

Security policies:

- Security charges may apply for events that
 - Have more than 50 attendees
 - Occur outside of normal building hoursFor an estimate of these charges, please contact the special events manager.
- 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).

- If an event involves the service of alcohol, additional security coverage will apply.

Non-Wharton Venues

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

Note: Doctoral students are to send all contracts to the Doctoral Programs office to be signed by the Purchasing Office. Venues should be scheduled at least one month before your conference.

SELECTING A CATERER

If you are using any Wharton buildings, you will need to use an approved caterer (see link below).

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 send the contract to the Doctoral Programs office.

Once you determine your caterer and your catering needs, please forward all catering contracts to the Doctoral Programs office who will submit the contracts to the Penn Purchasing Department for signature. Students should confirm caterer payment type (i.e. Purchase Order, Budget Code, Cash/Check) with Doctoral Programs office BEFORE the contract is signed by Purchasing.

All vendors and caterers must be from the Penn-approved supplier list: <http://cms.business-services.upenn.edu/purchasing/making-purchases/find-a-supplier/supplier-search.html>.

Things to consider: Do your guests have any dietary restrictions/needs? Will alcohol be purchased (see section on Alcohol)?

RENTING EQUIPMENT

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 (link above). 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

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 Doctoral Programs office about these specific vendors and to discuss giveaway options.

Vendors must be from the Penn-approved vendor list.

Note: Vendors typically need a minimum of 2-3 weeks to produce most items.

REQUESTING A/V TECHNOLOGY

Does your event require any special A/V needs such as a podium, lavalier or hand-held microphone, PowerPoint access? If using a non-Wharton venue, contact the respective facility office or manager to secure any technology needs. If you are using a Wharton venue, you will need to confirm with the Doctoral Programs office *at least two weeks prior* to the event to fill out a request form for classroom technology.

PAYING FOR EXPENSES

There are several ways in which the Wharton Doctoral Programs office can assist you with your conference payments.

Student groups are not permitted to purchase items (goods or services) until approved by the Doctoral Programs Office. Failure to comply may result in reimbursement requests denied by the University.

Purchase order: 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 invoice and contract to the Doctoral Programs office *at least one month prior to the required payment date* so that a purchase order can be processed.

Check: If a vendor requires a check, please submit the invoice and contract to Doctoral Programs office *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 notify the Doctoral Programs office that you will need to send the respective office a budget code for payment. *Use of budget codes MUST be approved by the Doctoral Programs office.

Reimbursements: If the Doctoral Programs office approves that you may pay for an expense out of pocket, please contact the Doctoral Programs office with the following: itemized receipts (required), list of event attendees, date, time, location and purpose of event. 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.

Contracts: Per University guidelines, all vendor/speaker contracts must be signed by the University Purchasing Department; students and staff are not permitted to sign off on contracts.

The University of Pennsylvania is tax-exempt. You are required to fill out the tax-exemption certification online <https://cms.business-services.upenn.edu/purchasing/policies-a-forms/forms/tax-exemption-certificate.html> . The University's sales tax number is 75-532-357.

ALCOHOL

If your graduate student organization hosts an event with alcohol, your organization is responsible for adhering to all State and University regulations. You are liable for what happens, legally and according to the University.

Your organization cannot exchange money for alcohol in any way, shape, or form. This is a state law, not Penn

policy. You cannot sell alcohol at an event. You cannot sell tickets to an event if the ticket price includes alcohol (i.e., you cannot charge students to get into a happy hour). Basically, your organization always has to provide the alcohol for free or else go through a vendor who has a license to sell alcohol (like a bar or restaurant).

If you are hosting an event with alcohol on campus, you must:

- **All student groups are required to register their events**, with or without alcohol. After you submit your registration materials, you will hear from AOD (Alcohol and Other Drug office) with next steps. Please note that an event is not approved until AOD signs off, and groups should not publicize their events until after approval is received.
- **Register all on-campus and off-campus events here:**
<http://www.vpul.upenn.edu/alcohol/hostanevent.php>
- Procure your alcohol from a licensed Pennsylvania provider.
- Provide non-alcoholic beverages (and not just water).
- Provide appropriate amounts of food.
- Have a system for ensuring that only people aged 21+ have access to drink alcohol.
- **Hire a [University-approved bartender](#) for ALL events that are serving alcohol. Bartenders are required for large events as well. Please contact Noelle Melartin at the Office of Alcohol and Other Drug Program Initiatives (melartin@upenn.edu) for bartender requirements.**
- All on campus events with alcohol must have University approved security present. The size of your party will dictate the number of security needed. Please contact Noelle Melartin at the Office of Alcohol and Other Drug Program Initiatives (melartin@upenn.edu) to discuss current security expectations.
- No advertisement of alcoholic beverages shall be permitted, either directly or indirectly, in any booklet, program, book, yearbook, magazine, newspaper, periodical, brochure, circular, or other similar publication, published by, for, or on behalf of any educational institution.
- Service of alcohol at on-campus events must end no later than 1AM; events may continue until 2AM.
- The organizers of events must properly dispose of partially filled and empty alcohol containers at the conclusion of the event.
- NO kegs on campus!
- Think carefully before serving hard liquor. We really discourage it.
- Have a plan to prevent guests from over-imbibing, and have a plan for dealing with intoxicated persons.

Organizer Responsibilities

- Any member of the Wharton community that wishes to hold an event where alcohol will be served must sign the Wharton Complex Alcohol Usage Agreement available in the Wharton Operations Office, in room F30, Jon M. Huntsman Hall
- Students/Clubs who wish to hold events where alcohol will be served are also responsible for additional security and housekeeping expenses. These services must be arranged through the Wharton Operations Office (room F30, Jon M. Huntsman Hall)
- Event organizers and/or hosts are responsible for ensuring that no person will be served alcohol while visibly or obviously intoxicated. Event organizers and/or hosts are strongly encouraged to call for appropriate medical assistance for attendees who appear to be intoxicated.
- All event organizers and/or hosts should read and be familiar with the complete [University Drug and Alcohol Policy](#).

Publicizing Your Event

Any advertisement for social events, including but not limited to flyers, posters, invitations, emails, calendar and plasma screen postings must include the statement “Non-alcoholic beverages will also be provided for those who are under 21 or those who choose not to drink.” This statement must be as prominent as any reference made to alcohol in the advertisement.

Purchasing Alcohol

- The National Council on Alcoholism and Drug Dependence recommends the following guidelines in planning events:
- Zero (0) drinks for individuals who are under twenty-one (21), driving, chemically dependent, or pregnant
- One (1) drink per hour for moderate drinking
- No more than three (3) drinks per day
- One (1) drink equals twelve (12) ounces of beer (6% alcohol by volume or less), five (5) ounces of wine, a nine (9) ounce wine cooler, or 1.5 ounces of 80 proof liquor
- In advance, determine the number of legal-aged guests who may be drinking. Based on that number, order no more than one (1) drink per person, per hour (not to exceed three (3) drinks per legal guest).

Pennsylvania State Law does not permit the transport of alcoholic beverages across state lines. Wine and other alcoholic beverages must be purchased through the Pennsylvania State Store System. Beer must be purchased from a local Pennsylvania distributor. No reimbursement will be processed for out of state purchases.

Outdoor Activities

Outdoor activities involving alcohol should be limited to areas that are clearly demarcated and in which it is possible to exercise adequate control of access to and consumption of alcohol by anyone on the Penn Campus. Wharton will require you to hire additional security for all outdoor events. These services must be arranged through the Wharton Operations Office (room F30, Jon M. Huntsman Hall).

Disposing of Alcohol

Event organizers and/or hosts must ensure that there is a means of properly disposing of partially filled and empty containers at or before the conclusion of the event.

Compliance

Event organizers that violate the Drug and Alcohol Policy and/or the Guidelines stated above will be subject to disciplinary procedures, which impose sanctions up to and include expulsion or termination from employment, and/or referral for prosecution.

There are additional rules for undergraduate student organizations. See [all of the rules around hosting an event with alcohol](#) on campus. If you have any questions about alcohol policies, please contact Noelle Melartin from the Office of Alcohol & Other Drug Program Initiatives at melartin@upenn.edu.

APPROVED CATERERS & VENDORS

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 confirming payment type in advance.

Use the Penn Supplier Search for all approved caterers and vendors: <http://cms.business-services.upenn.edu/purchasing/making-purchases/find-a-supplier/supplier-search.html>

PLANNING YOUR CONFERENCE

PRE-PLANNING

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 Doctoral student or will it also be open to Wharton undergraduates, 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 Wharton calendar on SPIKE.
- 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 Doctoral Program sponsored student organizations may sponsor conferences.

CONFERENCE PROPOSAL

Clubs must submit a conference proposal to the Doctoral Programs office at least one semester prior to the proposed event. The proposal should include:

- The objective(s) of the conference
- Intended audience and expected attendance numbers
- List of possible speakers
- Event date/time
- Event location(s)

- Conference schedule of events
- Projected budget, including venue costs, catering costs, speaker fees, giveaways, security, housekeeping and other labor, marketing, etc.

The Doctoral Programs office will meet with the groups' conference planning committee to review the proposal and discuss next steps.

SELECTING A VENUE

You will need to schedule a meeting *one month prior* to the event with the Wharton Operations [special events manager](#) to discuss the event details, including classroom technology, security, catering, and housekeeping.

INVITING SPEAKERS

If you are planning an event where a guest speaker is going to be invited to the School you must complete a [speaker request form](#). All guest speakers must be approved by the Office of the Dean and in some cases by the University before an invitation can be extended.

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 [speaker request form](#) and be sure to review the Wharton [event toolkit](#).

Inviting the Dean

You must submit the [Dean's Request Form](#) at least two *months before* your event if you would like the Dean to attend or speak.

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).

SIGNING CONTRACTS

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

SELLING TICKETS

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 Doctoral Programs office so that the revenue can be deposited into the student group account. 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 PayPal, you will need to make sure that the check from PayPal is made out to "The Trustees of the University of Pennsylvania."

MARKETING

You have many marketing channels available to advertise your conference:

- [SPIKE](#): Make sure you post your event on SPIKE so it will then be listed on the SPIKE Wharton-wide calendar.
- *Flyers, posters, and signage*
 - Flyers may be handed out in Wharton and 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

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 Doctoral Programs office for a copy of the form. 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.

The selected photographer must be from the Penn-approved supplier list: <http://cms.business-services.upenn.edu/purchasing/making-purchases/find-a-supplier/supplier-search.html>.

SAMPLE CONFERENCE PLANNING TIMELINE

Task	Deadline
Review the Pre-Planning section of the guide.	At least three months before
Review the University and SPIKE calendars and select a date for your event.	
Select a venue.	
Submit speaker list via online speaker request management system .	At least two months before
Invite the Dean to attend/speak via the Dean's Request Form .	
Select a caterer.	At least one month before
Order promotional items.	
Submit any contracts to the Doctoral Programs office.	
Notify your speakers if you intend to invite the media to your event.	

Submit your draft press release to the Wharton Communications Office and the Doctoral Programs office.	
Conduct a walk-through of the venue with the facilities/events manager.	
Provide facilities/events manager with updated conference schedule and any delivery/pick-up needs. If the event is at on campus venue, also provide a list of any non-Penn guests who will be attending.	At least two weeks before
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.	
Submit all reimbursement requests to the director of student life.	Within five days after
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 the following year’s conference.	Within two weeks after