



HOUSING AND DINING SERVICES  
CONFERENCE SERVICES  
2601 WARRING STREET  
BERKELEY, CALIFORNIA 94720-2288  
(510) 642-4444

## SUMMER CONFERENCE PLANNER'S CHECKLIST

**Conference Arrival Date:** \_\_\_\_\_

Check off each item below as they are completed:

### 12+ Months in Advance

- Determine a practical budget for the type of conference you would like to plan.
- Set preferred and optional conference dates.
- Realistically determine how many participants you anticipate and how many will need housing. Keep in mind, overestimating these numbers could become very costly.
- Determine the number of meeting rooms and what sizes you will need. Include all breakouts and catered functions.
- Submit your inquiry to Conference Services.

### 6-12 Months in Advance

- Provide all appropriate billing and contact information.
- Schedule a site visit with your coordinator.
- Review our Terms & Conditions.
- Submit deposit payment 2 weeks after deposit invoice received.
- Submit Signed Contract 2 weeks after contract received.

### 3-6 Months in Advance

- Provide copy of conference marketing materials to your coordinator.

### 2-3 Months in Advance

- Discuss preliminary food and beverage needs with your coordinator.
- Provide preliminary program schedule.
- Send correspondence to your guests, speakers and staff about any parking needs they may have.
- Send correspondence to your guests, speakers and staff about any dietary restrictions they may have. Please communicate this information to your coordinator.
- Start thinking about the Audio and Visual equipment you'll need. Include the needs of any guest speakers and/or exhibitors at your event.

### 30 Days in Advance:

- Catering/Special Meal requests and menus are due.
- Provide finalized meeting space setup needs, including diagrams.
- Communicate all parking needs to your coordinator.
- Request Ethernet access in guest sleeping rooms and/or meeting rooms.



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Submit all Audio/Visual requests (unless you are bringing your own equipment).  
Determine a date for the Pre-Conference briefing with your coordinator. This briefing will occur after the Housing/Rooming Lists have been submitted, but before the group move-in date.  
Submit a Certificate of Insurance to your coordinator.  
Confirm housing check-in and check-out times and locations with your coordinator.

**2 Weeks in Advance:**

Submit your Housing and Rooming Lists.  
Final accommodations pre-payment due. Prepayment charges are based on the number of people on the Housing List, or 80% of your final contracted number of people (whichever is greater) multiplied by the accommodations package rates, less the deposit.  
Include Early Arrivals and/or Late Departures on your Housing and Rooming Lists.  
Provide final list of commuting guests that will need Commuter meal cards. This number can increase, based on availability, but it cannot decrease.  
Provide accurate count of Single-Use guest meal cards for the duration of your conference. Please consider how many meals you will be providing for each of your non-resident guests.  
Provide your coordinator with a final conference itinerary.  
Submit all Cal Catering Express orders to your coordinator.

**4 Days in Advance:**

Limited Additions and Deletions to the Housing List can be made 3 days prior to move in. To avoid No Show charges, all cancellations must be communicated to your coordinator.

**Conference Departure Date:** \_\_\_\_\_

\*Full Payment of the conference account is due approximately 3 weeks after you receive your final bill.