



# **Event Planning**

## ***Checklist and Guide***

Event Name  
Month Date, Year

*Note: This guide and checklist are tools to assist in event planning only; it is not required that the guide be completed or utilized for any event. This guide may be particularly useful if you are new to event planning, or the event involves coordination of several areas.*

## Staff Council Event Planning Timeline

### EVENT LOGISTICS

Event Title:

Dates /  
Time/Length

Location:

Event Contact  
Person: <Insert name, cell phone number>

### EVENT DETAILS

- *Detailed Schedule*
- *Estimated # of Attendees*

### BUILDING SUPPORT

*Facilities Contact & Phone Number*

- Parking & transportation arrangements
- Announcements to be posted and by whom
- Custodial service arrangements
- Additional on-site information
- Vendor parking

### AUDIO VISUAL (A/V) SUPPORT

*A/V Contact & Phone Number*

- Equipment needed (overhead, projector, whiteboard)
- Instructions for A/V support
- Time for A/V setup
- Power (strip, extension cord)
- IT support – wired, wireless
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### CATERING

*Catering Contact & Phone Number*

- <Name> to order food. Estimated arrival time.
- Vendor, vendor address, vendor phone
- Items ordered

### SIGNAGE

- Sign-in sheets / directional signs / directional signage locations / tables

### INTERNAL INFORMATION

Brief Purpose: <Who / What/ Where / When / Why>

### Key Numbers

<Insert Name>, *Event leader*

Office Phone; Cell phone

<Insert Name>, *UNM Fiscal Support*

Office Phone; Cell phone

<Insert Name>, *UNM Department*

Office Phone; Cell phone

## Staff Council Event Planning Timeline

### PLANNING SCHEDULE RECOMMENDATIONS

<b>Countdown</b>	<b>Task</b>
6-8 months prior	Event Series: Schedule speakers & make rooms reservations & identify any special event requirements
4 months prior	Event Series: Gather speaker presentation titles, bios, short abstracts, etc.
3 months prior	All events: Create marketing materials (flyers, promotional emails); Identify audience and list-servs.
3 months prior	All events: Arrange for schedule travel & request additional information for administrative purposes
60 days prior	Event Series: Send mass communication to advertise the event / post posters
30-15 days prior	All events: Post posters / schedule recurring event reminders / arrange for catering / final itineraries for speaker travel
2 weeks prior	Submit Staff Council Event & Funding Request Form to Staff Council Administrator
15-10 days prior	All events: Confirm catering / email event overview / email travel itinerary for invited speakers
10-7 days prior	All events: Prepare all items for event
1-5 days after	Submit Staff Council Event Debrief Form to SC Administrator
5-10 days after	All events: Prepare paperwork for travel reimbursements in coordination with SC Administrator
2-3 weeks after	All events: Reconcile all payments in coordination with SC Administrator

### ONGOING TASKS

*Monthly Planning Meetings:* Planning committee to meet on the <insert recurring day, time> through <end date>. The final meeting will serve to debrief positives / negatives of planning preparations and to go over all outstanding financial obligations.

## Event Planning Details

### Room/Facility/Outdoor Area Reservations

Main Campus Outdoor Space Reservations: Student Activities Center, 277-4706 or <https://ems.unm.edu/>

North Campus Reservations: <http://unm-health.libwizard.com/http-hslic-unm-edu-iHSC-ReservationRequest> or Luke Frank, 907-9525 or [LFrank@salud.unm.edu](mailto:LFrank@salud.unm.edu)

SUB Reservations: 277-5498 or [event@unm.edu](mailto:event@unm.edu)

Johnson Center and Fields/ Seidler Natatorium: <https://recservices.unm.edu/facility-info/facility-reservations.html> or Donald Sollami, 277-8202 or [cs1551do@unm.edu](mailto:cs1551do@unm.edu)

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## AUDIO VISUAL (A/V) SUPPORT

Onsite support: A/V Coordinator may need onsite to assist with minor technical needs. This coordinator's duties may include moving equipment between sessions from room to room, setting equipment in place, or working with contract audiovisual professionals as needed.

Equipment Needed: Identify what equipment is needed. Standard presentation set-up: projector, pointers, a laptop, microphone, and access to sound systems.

UNM Purchasing for outside vendors: The university has contracts with several vendors. A university purchasing agent (Commodities Listing) may be very useful in negotiating the best rate for UNM. Best to negotiate rates for all equipment prior to the event.

Audio Visual/ Technical Support: Extended Learning/ Media Center: 277-0857 or [media@unm.edu](mailto:media@unm.edu)

IT Support: 277-5757 or <http://it.unm.edu/index.html>

## MARKETING / SIGNAGE

Identify what signs are needed: flyers, directional signs, registration signs; sign-in sheets, nametags; table tents for speakers, etc.

Promotional flyers should include: event name, event summary statement, location, date, time, important deadlines, link to website.

Coordinate all Staff Council logo use and marketing through UNM Staff Council Communications and Marketing Committee: <https://staffcouncil.unm.edu/committees/communications-marketing/index.html>

## UNM FACILITIES & LOGISTICAL SUPPORT

Catering: UNM Catering, 277-2506 <https://unmcatering.catertrax.com/>

Safety & Risk Services (SRS): <http://srs.unm.edu/special-events/>

- Fire Safety/ Tent Application Forms/ Special Events Application Form (Over 50 people)/ Insurance Information
- 277-2753

Parking & Transportation Services (PATs): <http://pats.unm.edu/event-planning/index.cfm>

- Shuttle Service/ Parking Permits/ Traffic Control/ VIP Permits/ Bus Parking
- 277-1938

Facilities Management <http://fm.unm.edu>

- Rental equipment/ outdoor event guidelines/ trash removal/ posting & flyer guidelines/ tent guidelines
- Recycling: 277-0842 or [recycle@unm.edu](mailto:recycle@unm.edu)
- Facilities Management Special Activities: 277-7246 or <https://fm.unm.edu/services/special-activities-and-movers.html>
- Custodial Main Campus: 277-1814 or HSC/ North Campus: 272-0230

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- <https://fm.unm.edu/services/special-activities-and-movers.html> Check with Facilities Management if in doubt or have any questions or concerns. Facilities Management provides event assistance to the both main campus and Health Sciences and can provide direction on your event.
- <https://staffcouncil.unm.edu/councilors/procedures-forms/event-funding-proposal-procedures.pdf> this form is required for any Staff Council sponsored event, whether funding is requested or not.
- <https://staffcouncil.unm.edu/councilors/staff-council-event-planning-guide-2016.pdf> Staff Council Event Planning Guide
- Staff Council Event Resources URL <https://staffcouncil.unm.edu/committees/events/index.html>

### Suggested Time Lines and Tasks

No	Task	Description	Responsible Party	Complete
1	Admin – General	Select an event name / host	<Name>	<input type="checkbox"/>
2	Admin – General	Select a primary point of contact for the event. (Phone, Email)	<Name>	<input type="checkbox"/>
3	Admin – General	Identify speakers & draft agenda	<Name>	<input type="checkbox"/>
4	Admin – General	Select a date & time (beginning and ending times)	<Name>	<input type="checkbox"/>
5	Admin – General	Estimate the number of attendees.	<Name>	<input type="checkbox"/>
6	Admin – General	Select a location. Reserve the room / facility / outdoor area.	<Name>	<input type="checkbox"/>
7	Admin – General	Submit Funding/Event Request Form to Staff Council Administrator	<Name>	<input type="checkbox"/>
8	Admin – General	Identify audience and secure Listservs / contact information.	<Name>	<input type="checkbox"/>
9	Admin – General	Create an event overview and email to all responsible parties.	<Name>	<input type="checkbox"/>
13	Safety & Risk Services	Submit Special Events Application (for 50+ people) or Tent Application Forms	<Name>	<input type="checkbox"/>
14	Parking & Transportation	Identify parking needs & secure services	<Name>	<input type="checkbox"/>
15	F&B – Catering	Select a vendor for catering & gather menu options	<Name>	<input type="checkbox"/>
16	F&B – Catering	Order food & secure payment (PCard or Internal Purchase Requisition)	<Name>	<input type="checkbox"/>
17	UNM Purchasing – PCard	Obtain vendor's Certificate of Liability. (outside vendors only)	<Name>	<input type="checkbox"/>
18	UNM Purchasing – PCard	Submit an special exception (for restricted indices)	<Name>	<input type="checkbox"/>
19	Audio Visual	Identify A/V equipment & technical support needs & secure services	<Name>	<input type="checkbox"/>
20	Facilities Management Dept	Identify needs for special activities, outdoor events, trash removal, recycling, and custodial services.	<Name>	<input type="checkbox"/>
21	Communication	Create promotional flyers / posters / agenda in partnership with Communications & Marketing Committee	<Name>	<input type="checkbox"/>
22	Communication	Create mass email, send to listservs / UNM marketing outlets, & schedule event reminders	<Name>	<input type="checkbox"/>