

Staff Council Event Planning Guide

Committee Template

Event Name
Month Date, Year
Committee Sponsoring the Event



THE UNIVERSITY *of*
NEW MEXICO

Faculty Host
Title
Department
City, State

Event Overview

EVENT LOGISTICS

Event Title:

Dates / Time

Location:

Event POC: <Insert name, phone number> (Point of Contact)

Faculty Host: <Insert name, phone number> (Site Contact)

EVENT DETAILS (Note: all related costs must be pre-approved by Staff Council Executives)

- 11:30 am 12:00 pm – Lunch (UNMCC Foyer)
- 12:00 pm - 1:00 pm – Seminar (UNMCC Auditorium)
- # Attendees

BUILDING SUPPORT

Facilities POC & Phone Number

- Parking & Transportation arrangements
- Announcements to be posted and by whom
- Custodial Service Arrangements.
- Additional on-site information
- Building Coordinator

AUDIO VISUAL A/V SUPPORT

AV POC & Phone Number

- Equipment needed.
- Instructions for AV Support
- Time for AV Set-up

CATERING

Catering POC & Phone Number

- <Name> to order food. Estimated arrival time.
- Vendor, Vendor Address, Vendor Phone
- Items ordered
- Setup/Teardown times

SIGNAGE

- Sign-in Sheets / Directional Signs / Directional Signage Locations
- There are University rules for posting – please review these rules and regulations
<https://pathfinder.unm.edu/common/policies/posting-policy.html>

INTERNAL INFORMATION

Brief Purpose: <Who / What/ Where / When / Why (benefits to program or grant) / Grant Association>

Index:

Additional Notes:

Event Overview

Key Numbers

<Insert Name>, Supervisor of Event Coordinator, POC Office Phone; Cell phone
 <Insert Name>, UNM Fiscal Support Office Phone; Cell phone
 <Insert Name>, UNM Dept. Office Phone; Cell phone

PLANNING SCHEDULE (Note: all related costs must be pre-approved by Staff Council Executives)

Countdown	Task
8-12 months prior	Event Series: Identify speakers for the next year
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	Event Series: Create Marketing Materials (Flyers, Promotional Emails); Identify audience and list-servs.
3 months prior	Individual Event: 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	Individual Event: Post posters / Schedule recurring event reminders / Arrange for Catering / Final itineraries for speaker travel
15-10 days prior	Individual Event: Confirm Catering / Email event overview / Email Travel Itinerary for invited speakers
10-7 days prior	Individual Event: Prepare all items for event
5-10 days after	Individual Event: Prepare paperwork for travel reimbursements
2-3 weeks after	Individual Event: Reconcile all payments

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.

Weekly Meetings: Faculty host and project manager to meet informally on <set day>. The project manager to provide updates to Faculty Host on budget, registration, abstract submissions, hotel reservations for speakers, etc.

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: Luke Frank, 907-9525 or LFrank@salud.unm.edu

SUB Reservations: 277-5498 or event@unm.edu

Johnson Center and Fields/ Seidler Natatorium: Donald Sollami, 277-8202 or cs1551do@unm.edu

SC Project/Event Funding Requests/SC Event Debrief Form: <http://staffcouncil.unm.edu/councilors/staff-councilor-resources.html>

Event Planning Timeline

PURCHASING

Off-campus Vendors: Special exception required for restricted indices for PCard Purchasing. Certificate of Liability required from vendors delivering food on campus.

Alcohol Beverages: UNM Policy 4000. Read Closely 5.2.1 and 13: Alcoholic beverages can be purchased as long as the costs are not more than 30% of the food purchase; The purchases must be specified in the donor designation and it must be pre-approved by the Account Executive.

Hotel Deposit: Special Exception required for hotel deposit for events. UNM Purchasing will need to approve / sign all contracts and menus. Deposits must not exceed

UNM Payment Mechanism for Off-Site Events: All event costs, including sleeping & meeting room expenses, food & beverage, paid by UNM must be placed on a PCard or all costs must be place on a Purchase Order. No splitting of costs between the two is allowable. Approval to temporary increase PCard limited will be necessary one month prior to the event.

Tax Exemption Notice: Sales of tangible personal property to UNM are specifically exempted from the Gross Receipts Tax. Tax Exemption applies to the Food and Beverage portion of vendor contracts, but not to the other services. Meals are considered “tangible personal property,” but rentals and services do not apply.

FOREIGN NATIONALS

PCard Travel for Foreign Nationals: Individual requests with a copy of an official invitation letter must be approved by UNM Taxation prior to purchasing any travel for foreign national. Each foreign national must provide a signed, hard copy of W-Ben, copy of their Passport Name Page, Visa & Homeland Security Stamp. International guests must show their welcome letter to the customs upon entering the US to attain a business visa. *Important:* Reimbursements may prove difficult for guests without a business visa.

Copies for Passport Name Page, Visa & Homeland Security Stamp: Reproductions of the passports must clearly made so that the information is tied to the name/pictures. To be safe make copies of both pages opened to the information needed.

Reimbursements: Completed paperwork must be signed and approved by the department and sent to Taxation for signature with copies of the W-8BEN, passport reproductions. Taxation will forward the paperwork to the UNM Main or HSC Accounting Offices. Original, signed W-8Bens must be sent to UNM Purchasing.

Visiting the UNM Taxation Website for more information.

Event Planning Details

AUDIO VISUAL A/V SUPPORT (Note: this depends on the location/building)

Onsite support: AV Coordinator may be needed 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

MARKETING / SIGNAGE (Note: All marketing for any event must be approved by SC Communications and Marketing)

Identify which 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, and Link to website. <https://pathfinder.unm.edu/common/policies/posting-policy.html>

UNM FACILITIES & LOGISTICAL SUPPORT

Catering: Chart wells, 277-2506, <http://sub.unm.edu/event-planning/unm-departments.html>

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

- Fire Safety/ Tent Application Forms/ Special Events Application Form (Over 50 people)/ Insurance Information
- Louis Gonzales, 277-2753 or hogmaz1@unm.edu

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

- Shuttle Service/ Parking Permits/ Traffic Control/ VIP Permits/ Bus Parking
- Christine Evans, 277-9502 or cgevans@unm.edu

Physical Plant Department: <http://iss.unm.edu/ppd/>

- Rental Equipment/ Outdoor Event Guidelines/ Trash Removal/ Posting & Flyer Guidelines/ Tent Guidelines
- Recycling: 277-0842 or recycle@unm.edu
- PPD Special Activities: 277-7246 or <http://iss.unm.edu/ppd/evspevents.html>
- Custodial Main Campus: 277-1814 or HSC/ North Campus: 272-0230

Event Checklist

No	Task	Description <i>(NOTE: A funding request form and approval must be submitted to SC Executives prior to any Event Coordination) Refer to Event Planning Details</i>	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	Identify audience and secure Listserv / contact information.	<Name>	<input type="checkbox"/>
8	Admin – General	Create an event overview and email to all responsible parties.	<Name>	<input type="checkbox"/>
9	Admin – Invited Speakers	Obtain Presentation Titles / Short Abstract / Short Speaker Bio / Other information for Banner ID, etc.	<Name>	<input type="checkbox"/>
10	Admin – Invited Speakers	Arrange speaker travel & create travel itineraries	<Name>	<input type="checkbox"/>
11	Admin – Invited Speakers	Create Banner ID & submit travel reimbursements.	<Name>	<input type="checkbox"/>
12	Safety & Risk Services	Submit Special Events Application (for 50+ people) or Tent Application Forms	<Name>	<input type="checkbox"/>
13	Parking & Transportation	Identify parking needs & secure services	<Name>	<input type="checkbox"/>
14	F&B – Catering	Select a vendor for catering & gather menu options (Note: in most cases this would be approved by SC Executives and through the SC administration office)	<Name>	<input type="checkbox"/>
15	F&B – Catering	Order food & secure payment (PCard or Internal Purchase Requisition) (Note: same as item 14)	<Name>	<input type="checkbox"/>
16	UNM Purchasing – PCard	Obtain vendor’s Certificate of Liability. (outside vendors only) (Note: same as item 14)	<Name>	<input type="checkbox"/>
17	UNM Purchasing – PCard	Submit an special exception (for restricted indices) (Note: same as item 14)	<Name>	<input type="checkbox"/>
18	Audio Visual	Identify AV equipment & technical support needs & secure services (Note: same as item 14)	<Name>	<input type="checkbox"/>
19	Physical Plant Dept.	Identify needs for special activities, outdoor events, trash removal, recycling, and custodial services. (Note: same as item 14)	<Name>	<input type="checkbox"/>
20	Communication	Create Promotional Flyers / Posters / Agenda (Approved through SC Communications and Marketing)	<Name>	<input type="checkbox"/>
21	Communication	Create mass email, send to Listserv / UNM marketing outlets, & schedule event reminders (Note: same as item 20)	<Name>	<input type="checkbox"/>