	Title: Conferences and Special Events Policy and Procedure	Review Frequency: Two Years	Effective Date: 11/1/2016 (Revised 10/27/2016)
	Document Category / Document Type: Policy and Procedure	Doc Control #	#CON-220
		Revision #	4

1. Purpose/Objectives.

1.1. The purpose of this policy is to provide guidelines to faculty, staff, and students or College of Nursing (CON) organizations in planning and scheduling events on or off campus as a part of official UNM CON business. University employees and students requesting to host CON events, including meetings, exhibits, performances, conferences, training, and recreational activities are expected to follow these policies.

2. Scope.

2.1. This policy applies to College of Nursing faculty, staff, students, and affiliated organizations or departments who would like to host an event as a part of official UNM CON business either on campus or off campus.

3. Content.

3.1. General Requirements

- 3.1.1. Venue managers are responsible for their spaces and are expected to follow and oversee the local policies or prerequisites for use of their space.
- 3.1.2. The event sponsor must be a recognized University group, organization, or individual(s) and, in the case of student events, a faculty or staff adviser.
- 3.1.3. The event sponsor accepts full responsibility for all stages of planning and execution of the event, including being the primary planner and contact.
- 3.1.4. The event sponsor must have a strong presence at the event, have a valid University or College of Nursing spending index or have approved access to a valid University or College of Nursing spending index, and take fiscal responsibility for event costs and budgeting.
- 3.1.5. The event sponsor must seek appropriate advanced approval for all related event planning and staffing from College of Nursing and University offices to ensure scheduling needs and deadlines are planned for. Examples of College of Nursing offices/individuals who may need to provide approval and specific types of events include the Dean for development and alumni sponsored events with a projected total budget of \$5,000 or greater must seek approval from the Dean. Faculty or student sponsored events with a projected total budget of \$5,000 or greater must seek approval include Dean, Associate Dean, Team Chairs, Program Directors, Student Services, Organizational Services, IT Support, Alumni Affairs, Development, or other offices/individuals as appropriate.

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- 3.1.6. For development and alumni sponsored events with a projected total budget of \$5,000 or greater approval must be sought from the Dean.
 - 3.1.7. For faculty and student related events with a projected total budget of \$5,000 or greater approval must be sought from the Associate Dean for Academic Affairs.
 - 3.1.8. The event sponsor is encouraged to establish an event committee to assist with planning and staffing of the event.
 - 3.1.8.1. Committee membership should be comprised of College faculty, staff, students, and/or community partners who directly relate to the focus of the event.
 - 3.1.8.2. Whenever possible, a member of the Information Technology Team should be asked to join the event committee to ensure proper considerations are made for the technology support needs of the event.
 - 3.1.8.3. College of Nursing employees must seek permission from their immediate supervisor to join the event committee.
 - 3.1.9. Event sponsors and committees are encouraged to review the “How To” document in Attachment E.
- 3.2. Budget and Cash Management
- 3.2.1. The event sponsor must work with Organizational Services to develop a budget for costs associated with the event, including but not limited to space and furniture rental, catering, supplies, marketing and advertising, collateral, staff salaries, honorariums, and travel related expenses for invited guests/speakers and staff/faculty supporting the event as necessary. An example budget can be found in Appendix A.
 - 3.2.2. If charging registration fees to event attendees, the event budget must also include projected revenue which will be used to offset the costs of the event, including all budgeted expenses. Any net income remaining will be allocated to an appropriate College of Nursing index to use for subsequent annual or bi-annual events or other similar events/programming in the future should annual events be discontinued or for other College of Nursing initiatives under the direction of the Dean or Associate Dean for Academic Affairs.
 - 3.2.3. All efforts should be made through the budget development and planning process to avoid financial and/or physical losses associated with events or conferences associated with the College of Nursing. Should the event expenditures project any net loss prior to the event, the event sponsor will take appropriate action to adjust the event budget to reduce spending in order to eliminate the potential for net losses due to the event.
 - 3.2.4. Should an event result in a net loss, the event sponsor will consult Organizational Services and the Dean in order to develop a plan for covering any financial and/or physical losses as a result of the event. In the case of an event incurring a financial or physical loss to the College of Nursing, recurrences of the event in the future will be decided by the Dean and/or Associate Dean for Academic Affairs.

- 3.2.5. If the event sponsor is requesting funding support from the College of Nursing from a central spending index managed by the Dean's Office or the Associate Dean for Academic Affairs Office, the event sponsor must develop a budget with Organizational Services to seek appropriate approval prior to scheduling any event related activities.
 - 3.2.6. If an event has any associated registration costs for attendees, event sponsorship, or any other generation of revenue, the event sponsor or a designated event committee member must comply with University Policy 7200: Cash Management. The event manager or designated event committee member must work with Organizational Services to ensure all cash, checks, credit card payments, money orders, gift cards, or other forms of payment are allocated to the appropriate College of Nursing index while following all University and College of Nursing cash management procedures.
- 3.3. Event Staffing
- 3.3.1. If the event sponsor or event committee requests the assistance of College of Nursing staff for the event, the event sponsor must seek advanced approval from the staff member's immediate supervisor prior to assigning any event related tasks to the staff member.
 - 3.3.2. Staff members must complete a "Special Duty Request Form" and receive supervisor approval to assist with the event and return the completed form to the event sponsor or event coordinator, see Attachment C.
 - 3.3.3. Staff who are requested to work on an event that falls outside of his/her normal duties, standard business hours, or is not directly assigned by his/her immediate supervisor must coordinate schedules and workload details required for his/her regular duties and event related duties with the immediate supervisor and the event sponsor.
 - 3.3.4. If additional work exceeds the standard work week (40 hours), the event sponsor must seek approval of the Dean and the staff member's immediate supervisor and must provide funding support to cover overtime salary costs or reimburse the department/ team's index for compensation time earned. Every effort should be made to avoid overtime payment. See UNM Administrative Policy 3300, 3305, 3310 and the College of Nursing Policy: Staff Work Hours for information on overtime, comp-time, and supervisor approval. To request overtime or compensation time, staff must complete the UNM Overtime/Compensatory Time Request and Authorization Form (Attachment D).
 - 3.3.5. Non-exempt staff working on event related tasks or providing support at events outside of normal business hours (Monday – Friday from 8:00am to 5:00pm) should not be scheduled for less than a two (2) hour work shift if the shift is not immediately before or immediately after their normally scheduled work hours. As appropriate and feasible, the event sponsor will solicit student volunteers to assist with event preparation and day of event staffing.
- 3.4. Marketing and Communications

- 3.4.1. Event sponsors or event committees who need marketing materials, either electronic or printed, must work with the College of Nursing Marketing and Communications Committee to request and develop materials and/or obtain templates to use for developing conference materials. All College or College-affiliated events must follow University, Health Sciences Campus, and College of Nursing marketing and branding standards. Materials that do not follow University, Health Sciences Campus, or College of Nursing marketing and branding standards cannot be utilized for event purposes and will be destroyed.
 - 3.4.2. All materials will display The University of New Mexico logo, UNM Health Sciences Campus logo, or the UNM College of Nursing logo whichever is most appropriate. No event shall create a personalized/ event specific logo without expressed permission from University and HSC marketing and branding offices.
 - 3.4.3. Participants in University activities are sometimes photographed, videotaped, or recorded for promotional, educational, and research programs. Such audio, video, film and/or print images may be edited, duplicated, distributed, reproduced, broadcast, and/or reformatted in any form and manner without payment of fees. Event workers and/or sponsors must obtain permission from event participants in order to utilize their image. When large numbers of event attendees prohibit the ability to gather individualized permission to photograph, videotape or otherwise record for official College or University use, clear signage must be prominently posted notifying event attendees that they may be recorded while attending the event for official College or University use. Please see the example of signage to post at official College or University events in Attachment B.
- 3.5. Event Logistics and Scheduling
- 3.5.1. The event sponsor will communicate event logistics including title of event, dates, times, location, and description to the College of Nursing IT department to post event information to the College's website in order to communicate event logistics both internally and externally. Information must be submitted using the IT support ticketing system on the College's website.
 - 3.5.2. Events where alcoholic beverages are distributed or sold must abide by University of New Mexico policies 2140 and 2150 and seek appropriate approval in advance of the event.
 - 3.5.3. During event planning, help with access needs for persons with disabilities can be obtained from the Accessibility Resource Center, Mesa Vista Hall 2021, (505) 277- 35206, <http://as2.unm.edu>.
 - 3.5.4. The University of New Mexico regulates occupancy limits on the number of individuals who can be in a space during each event to ensure safety of all in attendance and to be in compliance with fire safety codes. Ticket sales will be restricted to the appropriate capacity limit to ensure compliance with established limits. Occupancy capacities for specific venues on campus are available through the University of New Mexico Event Management System and will be clearly identified during the event/space reservation process. The event sponsor is

- responsible for taking positive actions to ensure that occupancy limits are adhered to during the course of the event.
- 3.5.5. If the event is income producing for the sponsoring unit, or if ticket sales are made available to the general public, the University will determine if the sponsoring unit must purchase insurance to cover any claims or suits that may result from the conduct of the event and the level of insurance necessary. The cost of insurance will be the responsibility of the event sponsor and must be budgeted for as part of the total event budget. If the revenue generating event is cosponsored with an organization not affiliated with the University, UNM will require that the nonaffiliated organization provide evidence of insurance.
 - 3.5.6. In the case of an incident occurring during a College of Nursing event, whether held on-campus or off-campus, the event sponsor or designated event committee member will submit a Notice of Incident form through the Safety and Risk Services Department at UNM. All incidents must be reported immediately to the individual's supervisor, department head, and Safety and Risk Services. Incidents include, but are not limited to, work related injuries, injuries to event participants, property damage, spills or releases of hazardous substances/ wastes, and wastewater. For forms and additional information, visit the Safety and Risk Services department's website: <http://srs.unm.edu/important-forms.php>.
 - 3.5.7. On campus events with an expected attendance exceeding fifty participants will be required to submit a Special Event Application Form to the UNM Department of Safety and Risk Services at least six (6) weeks prior to the date of the event. Forms can be found online at <http://srs.unm.edu/special-events/>.
- 3.6. Information Technology
- 3.6.1. If support from the Information Technology department is required for the event, the event sponsor must submit a formal request no less than one month prior to the event. Information Technology support may include but is not limited to creating Zoom sessions for participants, developing electronic registration forms, uploading information to the College's website, email support, equipment (i.e. computer/ laptop(s), projector, monitors, phone, etc.).
 - 3.6.2. For events requiring Information Technology technical support leading up to, during, or after the event the event sponsor must request permission of the Information Technology Manager in addition to following all other requirements of this policy.
 - 3.6.3. The event sponsor is responsible for all Information Technology equipment that is requested for the event. Should any equipment be damaged while in the possession of the event sponsor, the event budget must allocate funds to replace or repair damaged equipment.
 - 3.6.4. Requests for event support that are within the normal scope of duties for Information Technology staff will be reviewed and assigned by the IT Manager. Any requests for staff assistance outside of his/her normally assigned duties must follow all other guidelines within this policy.

3.7. Invited Speakers, Dignitaries, and Government or Legislative Officials

- 3.7.1. If inviting dignitaries, elected officials, or other high profile individuals to an event, the event sponsor must inform the Office of Government and Community Relations at the University level prior to inviting and confirming these individuals to participate in a College of Nursing related event per University policy.
- 3.7.2. When invited speakers and dignitaries for special events, conferences, and programs are brought to campus, the event sponsor should coordinate travel arrangements, lodging, and in-town and budget for these expenses in the event budget.
- 3.7.3. If possible while on campus, special guests, invited speakers, government officials, and dignitaries should have time scheduled with one of the following offices or individuals: the Office of the Dean, Office of the Associate Dean of Academic Affairs, or one the Education, Practice, or Research Team Chairs. The event sponsor or designated event committee member will coordinate with these offices to schedule time as available.
- 3.7.4. Departments may pay an honorarium to an individual of special achievement or renown, in return for that individual’s willingness to visit the university and participate in a University event of short duration (such as a speaker, reviewer, seminar/ conference participant, etc.) with the understanding that the payment does not constitute compensation commensurate with the actual services provided. The event sponsor must budget for any honoraria within the event budget and must follow the University Policy 2170 regarding honorarium payments.

4. Responsibilities.

RESPONSIBILITIES	
Position/Title/Group	Requirements/Expectations/Duties
Office of Academic Affairs	Responsibility for adherence to this policy and procedures.
Faculty, Staff & Students	Responsible for understanding this policy and procedures

5. Records Applicability/Retention

- 5.1. “Documentation related to this policy will be maintained in accordance with UNM Administrative Policies and Procedures, UAPPM Policy 6020, and applicable requirements of the New Mexico Public Records Act, N.M.S.A § 14-3-1 et. seq.”

6. External Reference(s).

- 6.1.

7. Internal Reference(s).

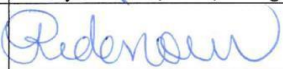
- 7.1. UNM Administrative Policies and Procedures – Policy 1040: Fundraising
<https://policy.unm.edu/university-policies/1000/1040.html>

- 7.2. UNM Administrative Policies and Procedures – Policy 2050: Government Relations and look up for relevancy Legislative Activity <https://policy.unm.edu/university-policies/2000/2050.html>
 - 7.3. UNM Administrative Policies and Procedures – Policy 2060: Political Activity look up for relevancy <https://policy.unm.edu/university-policies/2000/2060.html>
 - 7.4. UNM Administrative Policies and Procedures – Policy 2140: Use and Possession of Alcohol on University Property <https://policy.unm.edu/university-policies/2000/2140.html>
 - 7.5. UNM Administrative Policies and Procedures – Policy 2150: Sponsorship by Alcohol Beverage Companies <https://policy.unm.edu/university-policies/2000/2150.html>
 - 7.6. UNM Administrative Policies and Procedures – Policy 2170: Honorarium Payments <https://policy.unm.edu/university-policies/2000/2170.html>
 - 7.7. UNM Administrative Policies and Procedures – Policy 3300: Paid Time <https://policy.unm.edu/university-policies/3000/3300.html> & 3305 <https://policy.unm.edu/university-policies/3000/3305.html> & 3310 <https://policy.unm.edu/university-policies/3000/3310.html>
 - 7.8. UNM Administrative Policies and Procedures – Policy 4000: Allowable and Unallowable Expenditures look up for relevancy <https://policy.unm.edu/university-policies/4000/4000.html>
 - 7.9. UNM Administrative Policies and Procedures – Policy 4030: Travel---look up for relevancy <https://policy.unm.edu/university-policies/4000/4030.html>
 - 7.10. UNM Administrative Policies and Procedures – Policy 7200: Cash Management <https://policy.unm.edu/university-policies/7000/7200.html>
 - 7.11. UNM College of Nursing Policy #CON-320: Travel for Non-Exempt Staff <https://app.box.com/s/92w8htzq7i6s6w5x1vx6eie8hr9wy6s3/folder/71830974156>
 - 7.12. UNM UAPPM Policy 6020 <https://policy.unm.edu/university-policies/6000/6020.html>
8. Definitions.
 - 8.1. Event: Includes conferences, receptions, fundraising events, meetings, and other similar events that are sponsored/hosted by, benefit, or otherwise involve the College of Nursing in an official capacity.
 - 8.2. Venue: Any location where an activity, meeting, conference, or social gathering may be held. Venue Manager: The facilities, scheduling, or coordinating employee of a site used for an event whether on campus or off campus.
 - 8.3. Event Sponsor: The College of Nursing faculty, staff, or student who is the key person(s) responsible for all event-related duties and logistics. This individual(s) is the initiator of the event and related planning.
9. Key Words.
 - 9.1.
10. Attachments.
 - 10.1. Appendix A – Sample Events Budget Template

- 10.2. Appendix B – Official CON Event Signage for Consent to Record
- 10.3. Appendix C – Special Duty Request Form
- 10.4. Appendix D – Overtime/Compensatory Time Request and Authorization Form
- 10.5. Appendix E – How to Plan an Event

11. Approval Authority.

DOCUMENT APPROVAL & TRACKING

Item	Contact	Date	Approval
Owner	CON Faculty		N/A
	CON Administration		N/A
	Other: Click here to enter text.		N/A
Consultant(s)	CON Senior Faculty, CON Tenured Faculty, or CON Leadership Team/ Department	10/10/2016	Y
Committee(s)	CON Faculty Affairs Committee		N/A
	Staff Council		N/A
	Other:		N/A
Legal (if applicable)			N/A
Official Approver	Nancy Ridepour, Dean, College of Nursing		Y
Official Signature		11/4/2016	
2nd Approver (Optional)	President <i>pro tempore</i> of CON Faculty	Click here to enter a date.	
Signature		Click here to enter a date.	
CON Faculty Approval:		Click here to enter a date.	
Effective Date:		Click here to enter a date.	
Origination Date:		Click here to enter a date.	
Issue Date:		Click here to enter a date.	

12. Document History.

HISTORY LOG				
Date and Date Type: (Specify: Origination, Effective or Retired Date) In addition: Add Review Date when Effective Date does not change due to no major updates.	New/ Revision #	Title of Document:	Description of Change(s):	Approved By: Print Name/Title
Revised: 10/27/2016 Effective: 11/01/2016	1	Conferences and Special Events	New Document	Dean, Nancy Ridepour
4/20/2020	2	Conferences and Special Events	Transferred Policy #13.1.1 content to revised HSC policy template and numbering system to #CON 220. No changes.	

ATTACHMENT A – Sample Event Budget Template

Event Budget Expenses and Revenue

NAME OF EVENT	Event Number			
DATE	REVENUE	ESTIMATED	ACTUAL	BUDGET
REVENUE				
Registration Fee				
Concession				
Other				
TOTAL				
EXPENSES				
OPERATIONS / PHYSICALS / CONSULTANTS				
Room Rental				
Food & Beverage				
Audio/Visual				
Transportation				
Travel				
Printing				
Postage				
Telephone				
Utilities				
Supplies				
Other				
TOTAL				
PERSONNEL				
Salaries				
Benefits				
Travel				
Other				
TOTAL				
DEVELOPMENT / ADDED EXPENSES / SPECIAL EVENTS				
Printing				
Postage				
Telephone				
Utilities				
Supplies				
Other				
TOTAL				
GRAND TOTAL				
Revenue				
Expenses				
TOTAL				
REMARKS				
Event Budget Approved				
Event Manager or Staff Representative				
Operational Services Representative				
Approved Date				

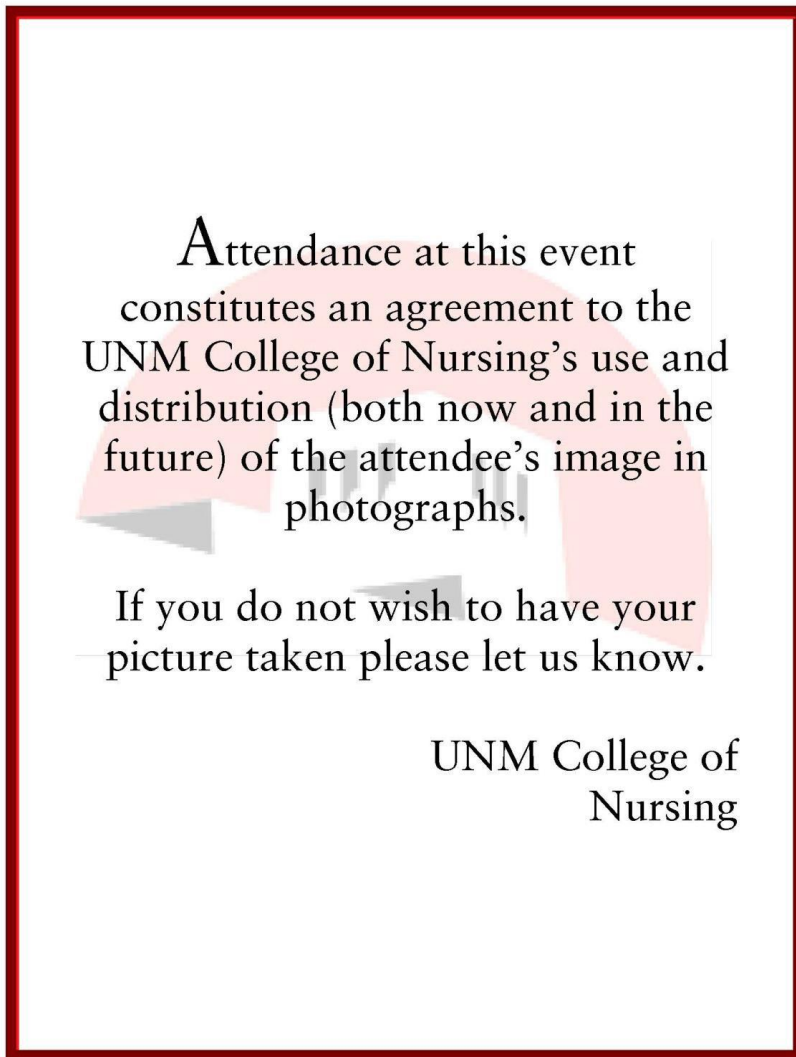
1/1/2014

Page 1


* To access the Excel budget template, please visit the College of Nursing O:Drive under Staff and Faculty Resources.

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Attachment B – Official College of Nursing Event Signage for Consent to Record



Attachment C – Special Duty Request Form



UNM
COLLEGE of NURSING

Special Duty Request Form

For use by CoN Staff for Events or Conferences. Please submit to Event Sponsor or Event Coordinator.

Request for Serving on Event/ Conference Planning Committee or Day of Event

Staff Member's Name: _____ Department: _____

Title/Description of Event: _____

Effective Dates of Event: _____

Proposed Interim Duties

The approximate number of hours of work prior to the event for planning/preparation are _____ hour(s) to be completed during standard business hours (M-F, 8 a.m.-5 p.m.).

The approximate number of hours of work at the event will be _____. These hours will be during/ outside (circle one) of standard business hours (M-F, 8 a.m.-5 p.m.). Approval for specific hours will be submitted for approval prior to the event.

Special duty assignments are intended to credit an employee for work that is outside the normal scope of their job, not additional work that is within the scope of their current job. By signing below, the supervisor confirms that the employee meets the qualification for the special duty and gives permission for the employee to participate in the extra duties.

As the employee requesting permission to participate in the planning process of the above event, I understand it is my responsibility to request permission from my direct supervisor prior to beginning special duty/ interim assigned duties.

Staff Signature: _____ Date: _____

Supervisor Approval

Supervisor Name: _____ Phone: _____

Supervisor Signature: _____ Date: _____

Approved? Yes No Reason: _____

Form DS-004 10/27/2014

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Attachment D – Overtime/Compensatory Time Request and Authorization Form



Overtime/Compensatory Time Request and Authorization

Overtime/Compensatory time may only be allowed if this form has been approved in advance of the overtime worked. Overtime is paid at a rate of 1-1/2 times the normal hourly rate for hours worked in excess of 40 during a work week. Compensatory time is time off granted in lieu of overtime, at the same rate as overtime. A work week begins at 12:01 am Saturday and ends at 12:00 am the following Friday.

Instructions: Employee submits request to time approving Supervisor. If approved, Supervisor routes to Director level for final approval. Retain form in Departmental Employee file.

EMPLOYEE INFORMATION	
Name:	Banner ID:
Title:	Department:
Email:	Phone:

OVERTIME REQUEST DETAILS
Estimated hours of overtime/compensatory time being requested:
Enter the dates and times that overtime needs to be worked:
Description of project or work to be performed during overtime hours:
Description of why work cannot be completed during regular work hours:

AUTHORIZATION		
For the hours above, I am requesting:		
<input type="checkbox"/> Overtime Payment; or		
<input type="checkbox"/> Compensatory Time		
_____ Employee Signature	_____ Print Name	_____ Date
_____ Time Approving Supervisor Signature	_____ Print Name	_____ Date
Approved by:		
_____ Director Signature	_____ Print Name	_____ Date

Retain signed form in Employee's Departmental File

Created 9/12/16

Attachment E – How to Plan an Event**Strategy**

- What is this event trying to accomplish?
- Who are you trying to target?
- How does this fit into the UNM College of Nursing's strategic plan?
- Will this be a one-time event or a recurring one? If recurring, at what frequency?
- Will it be an open invitation to the public or a private event?
- Will the event be co-sponsored by another department/ entity?

Budget

- What CON index will you be spending from?
- Where will start-up funding come from/ how much do you have to spend?
- Who can sign the internal requisitions?
- What is your estimated budget for all predicted expenditures and overall?
- Who's ultimately responsible for all expenditures?
- Who's going to write up and keep track of all internal requisitions?
- Are funds available or being matching by another department/ entity?

TO DO

- Request an index number from Organizational Services.
- Create a budget for all predicted expenditures, work with Organizational Services for assistance.
- Designate who will handle IR forms to ensure bills are paid.

Committee

- Determine who your key employees are.
- Do you need assistance from outside the CON?
- Who's the chair(s)? Should be same individuals who are responsible for the budget and overall event.
- Who's responsible for performing which logistical arrangements (catering, rentals, AV, etc)
- Provide timeline and budget if necessary.

TO DO

- Form an event planning committee.
- Set up regular meeting dates.
- Create a folder on the O drive to help with sharing of documents.

Date, Time, Key Players

- What is the date of the event
- Do you need to ensure a specific venue is available on your event date first or do you have options of where you can hold it.
- Are key players (i.e. Deans, Leadership, speakers) available on your date.
- What time of day will you hold it?
- How do local traffic, other events, travel habits, and work days affect the time of this event?
- When possible, verify your event is not scheduled on the same day/time as another event on

campus.

TO DO

- Determine the date and time of the event

Venue

- Indoor or out? If outdoor is there a backup plan for bad weather? On or off campus?
- Do you need a deposit on the room?
- Does a contract need to be signed by HSC?
- How many guests are you expecting? Is the physical capacity of space and amount of available seating work?
- Do you need special permits?

TO DO

- Secure your venue.

Timeline

TO DO

- Establish deadlines for all event logistics.
- Include those responsible for each piece and budget associated with each task.
- Include a budget associated with each task.

Keynote and Guest Speakers

TO DO

- Identify speakers.
- Contact speakers and invite to participate in event. If applicable, determine honorarium (within budget).
- Confirm with speakers the date, time and location of event (give them time limits on presentations).
- Collect bio and picture for publicity purposes.
- Make travel arrangements (within budget).
- Confirm travel arrangements 1 week prior to the event.
- Send Itinerary to speaker 1 week prior to event Collect any handouts, slide presentation or other materials they would like distributed.
- Provide speakers with an allotted amount of time for their speech or presentation to ensure the program remains on time.

Sponsorships

- Are sponsorships part of your budget?
- Which organizations are you going to ask for sponsorships from?

TO DO

- Determine the levels of sponsorship you are offering and incentives for each level.
- Create a list of those you wish to solicit.
- Meet with the CON Development Office.
- Once you receive sponsorships, collect logos for publicity purposes.

Registration

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THE USER IS RESPONSIBLE TO CHECK THE ONLINE POLICY WEBSITE TO VERIFY THE CURRENT VERSION PRIOR TO USE.*

- How will you collect RSVPs? By phone? By email?
- Can you take reservation online? What's the url?
- Will there be a payment? How much? How will you take payments? Who's responsible for depositing payments?
- Have a deadline for RSVPs.
- What is your refund policy?
- Will you have pre-printed name tags? Fillable name tag?
- Have fillable receipts available for on-site payment. Have change for cash payment.

TO DO

- If taking registrations online with payment, contact the UNM Bursars Office to use the vendor Marketplace for your online registration.
- Work with CON IT to set up registration without pay or to place the Marketplace link on the CON website.
- Determine how RSVPs/ticket sales will be taken.
- Determine a deadline date for final RSVPs/ticket sales.
- If selling tickets, create a refund policy.

Invitations

- What criteria will be used for the invitation list?
- Do other offices within or outside of the College need to be included to help reach your audience?
- Will your invitation be electronic or mailed?
- What is the design concept in terms of shape, size, fold/no fold, envelope/self-mailer, etc.?
- Who will be designing your invitations? Can someone within CON help? Do you have the budget to hire an outside vendor? All materials **MUST** be within UNM and HSC brand standards.
- What visual elements, imagery, or color schemes do you want to use? (The College of Nursing logo must be on all materials.)
- Do you want a save the date sent out? When?
- What deadline do you have for the invitations to be in the mail (at least 4-6 weeks in advance is typical)?
- Include price of registration/ticket as well as RSVP information.
- Are directions or a map included? Parking instructions?

TO DO

- Create an invitation list with names, mailing addresses and or email addresses.
- Identify or hire a designer to:
 - Create the Save the Date.
 - Create the invitation.
 - Create the map.
- Print:
 - Save the Date
 - Invitation
 - Map
- Mail:
 - Save the Date

- Invitation with Map

Media/Publicity

- Do you have a budget for publicity?
- Have you contacted CON Marketing and Communication committee for suggested avenues of marketing?
- Can you utilize free publicity (social media, CON website, HSC Public Affairs announcements etc.)?
- Work with the HSC Communications and Marketing office to develop and distribute a press release for the event.

TO DO

- Contact CON Marketing and Communications committee to discuss marketing possibilities.
- If applicable, write a press release for HSC Public Affairs to distribute.

Catering/Food & Beverage

- Determine menu concept (light or heavy hors d'oeuvres? Meals?).
- Any special themes relevant to the program?
- What items can the College provide and what items should the caterer bring including plates, utensils, glasses, trash containers, and appropriate tables?
- Does the venue have a preferred caterer? Is that caterer required or preferred? Are there other suggestions available in order to get comparison proposals?
- Do you need the menu to be printed out for guests?
- Do your speakers or guests have any dietary restrictions to consider?
- Any purchases over \$5,000 (including food) must go through proper main campus Purchasing approval. Work with Org Services to get this approved.

TO DO

- Request dietary restrictions from speakers/MC and attendees as appropriate.
- Order food and beverages.
- Keep record of attendees to submit with receipts for any food or alcohol purchases.

Photography

- Do you need photographs taken of the event?
- Can CON IT provide this service? Do you have the budget to hire an outside vendor?
- Create a list of those individuals or groups you have to have a photo of.
- If possible assign someone to assist the photographer with getting those must have shots.
- Shot list, locations and times for anything formal or staged for publicity.
- Lighting, or other setup requirements. Walk-thru prior to event.
- Local media (website, HSC Marketing, CoN Marketing, UNM event calendar, social).

TO DO

- Identify/Hire Photographer.
- Create a list of desired photos.

Physical Set-up and Break-down

- Where will event be (including presentations, receptions, and other combinations)?
- Indoor or outdoor? Or both?
- Will all guests be able to hear in this set-up or is a small sound system required?
- Podium or mike?
- Branding?
- Where will catering be staged and served?
- Is there room for check-in table near entrance?
- Coat check needed? Where will it be?
- Are there any physical challenges presented by the space or the layout (steep hills, sight lines for talk, etc.)?
- Will house- or grounds- keeping be necessary? (Pressure wash? Blow leaves?)
- Who will help with set-up and break-down of the event?

TO DO

- Determine logistical set-up for all portions of the event.
- Assign volunteers to set-up different areas.
- Assign clean-up after event to volunteers.

Décor & Signage

- Is any special signage required for the space?
- Any other needs for décor or special items like balloons or flags? UNM décor?
- Does the venue have restrictions on decorations?

TO DO

- Design signage
- Have signs printed
- Collect/purchase décor

Sound / Music / AV

- Is house/venue sound system adequate?
- Is there ambient music? Who brings? Live music? Trio, piano, etc.
- Choose appropriate and professional music if having music at your event. Do not choose music with profanity, political messaging, or other inappropriate content.
- Any AV augmentation for show and tell or presentation?

TO DO

- Order AV equipment.
- If necessary, hire musicians.

Parking / Directional Signage / Security

- Is there sufficient parking space for self-parking?
- If held on campus, could the event be held in the evening to save funds for parking permits and make it easier for guests to park?
- Is a valet required due to insufficient space or other physical challenges presented by the setting?
- Is there any signage needed in the area to denote event? At the house?
- Is any security needed during the event?
- Do we need to contact UNM parking to make arrangements to park on campus?
- Will your budget cover the cost of parking for event participants?

TO DO

- Create and print signage for parking.
- If on campus, purchase parking permits for guests/ attendees or waive parking tickets with UNM PATS for a particular parking lot.
- Hire security if needed for the event
- If the event is held on campus, speak with UNM Parking and Transportation to order temporary parking permits or to wave parking tickets for the day of the event.

Program

- MC's role: welcome, introductions, wrap-up, thank sponsors. Script for MC? Make sure you have name pronunciations for speakers.
- Ideas about good speakers and topics for this event.
- Length and style of program.
- Suggested speaking points for Dean and/ or Leadership.
- Is printed "Program" necessary? (print 10% more than necessary).

TO DO

- Print speakers handouts (print 10% more than necessary).
- Collect presentations ahead of time to have them loaded on to computer.
- Write script or speaking points. Be sure to include pronunciation of names.
- Design program/agenda.
- Print program/agenda

Volunteers

- How many volunteers will you need to work the day of the event?
- Do you have a budget for overtime for hourly employees? If not you need to utilize salary/ exempt employees.

TO DO

- Solicit volunteers.
- Assign volunteers according to tasks.

Registration / Welcome / Staffing

- Who has guest list?
- Nametags? Blanks for on-site? (be sure to pre-print nametags for speakers and volunteers.)
- Any guest giveaways with arrival packet?
- CON promo pieces available? Who brings?
- How many staff needed for check in, welcome?
- Registration should take place 1 hour prior to the event.

TO DO

- Request CON Tablecloth for registration table.
- Request table for registration.
- Print out copies of the RSVP list.
- Create a sign in sheet if needed.
- Print nametags.
- Print out any handouts.
- Bring promotional items to distribute.

Briefing Packet / Itinerary for Speaker/MC (2 weeks advance)

- Who does briefing packet? Itinerary?
- Gifts for the guest speakers?

TO DO

- Create a briefing packet for all speakers, emcee, and College or University Administrators attending the event (Dean or Associate Dean). Include key guests, event agenda and instructions.
- Purchase gifts for speakers/MC.

Follow-up Post Event

- How will you evaluate the event? If your event is a conference or workshop, consider providing an evaluation for attendees to complete. If the event is a reception, luncheon, or dinner follow up with event staff to ensure logistics went smoothly.

TO DO

- Write Thank you notes to volunteers and speakers.
- Write Thank you notes to strategic guests.
- Write Thank you notes to sponsors.
- Have a Wrap Meeting with volunteers. Discuss successes, need to improve, final guest count, budget, etc.
- Work with Marketing and Communications Committee to develop a story about the event and how successful it was.

To find a listing of approved UNM vendors visit <http://purchase.unm.edu/usp-list/universal-service-providers.html>.