**Event Planning Guide**

To begin, answer the following questions:

1. What do you hope to achieve by holding this event? Is it to transmit information, gather feedback from stakeholders, build a team, or something else?
2. What event design will serve your purpose? Will everything happen in one room or do you need breakout spaces? Will anything happen online?

**Lecture/speaker focused:** One room, podium, microphone, and laptop/screen for slideshows. Seating can be at round tables, in rows with tables (classroom style) or just rows of chairs. Best for transmission of information.

**Workshop/feedback focused**: Can be done in one large room or multiple smaller rooms depending on planned activities. Could have a main room plus a couple other rooms and participants can move between the rooms throughout the day. Round or conference tables work best when encouraging conversations among groups.

**Team building**: One room per team, conference table setups.

**Poster session:** Helpful to have an extra room, or a big room that will only be partially occupied. Set up poster boards.

**Hybrid:** Works best with lecture focused events, but possible with any of the above configurations. For lectures, have the in-person speakers stand in front of the laptop running the Zoom so they’ll be visible and audible. For workshops and team building, have someone moderate and include the Zoom attendees as a group (can use tools like Google Docs to co-develop written materials). Poster sessions can be presented lecture-style with the digital poster screen shared. Could also allow online participants to present if the in-person room has a screen and speakers.

**ONLINE ONLY:** Great when speakers/attendees are not in Albuquerque.

1. Are there any time or location constraints (e.g., must take place on UNM campus, speaker only available for one week in July)?
2. How many people will attend the event?
3. What is the event budget?

\*If using grant funds for the event, your funding agency may have additional restrictions/policies you need to follow; contact Contract and Grant Accounting for guidance

**How to…**

**RESERVE SPACE**

Free spaces:

**Classrooms:** <https://registrar.unm.edu/schedule-office/request.html>

**Roberts Room (60) or Scholes 101 conference room (18):** call (505) 277-4664

**Jackson Student Center** at the Anderson School
contact Analise “Lisa” McHale amchale@unm.edu 505 277-6148

**Library spaces**: <https://library.unm.edu/services/rooms/>

**McKinnon Center for Management**<https://www.mgt.unm.edu/events/room-request.asp> request online and follow up with Kate Kennedy Kate88@unm.edu

**Ortega Hall** **Room 335**
contact Fabiola: spanport@unm.edu

**PAIS building:**

PAIS1010 Workroom; PAIS 2120 Coop Room; PAIS 22124 Coop Conference Room

<https://isco-op.unm.edu/meeting-space/room-request-meeting.html>

For additional questions, please contact csakiest@unm.edu.

Paid spaces:

**Student Union Building**

Check SUB space availability here: [https://ems.unm.edu//EmsWebApp/?\_gl=1\*68ydvt\*\_gcl\_au\*MTE5NzIzNjY1NS4xNzE1MDkwMzY0](https://ems.unm.edu//EmsWebApp/?_gl=1*68ydvt*_gcl_au*MTE5NzIzNjY1NS4xNzE1MDkwMzY0)

To reserve, call the SUB at (505) 277-5498. They will email you a contract to sign and will need a departmental index to charge.

**Continuing Ed conference and meeting space**: <https://ce.unm.edu/conference-center/>

Zoom:

* Make sure whoever sets up the meeting knows what functions you plan to use, is comfortable running the technology, and knows where to store the video if recording.
* If using the waiting room function, be sure to designate someone to monitor and approve entry.
* When Zoom recordings are saved to the cloud, they can be found in the Mediaspace account of the person who created the meeting, accessed here: <https://mediaspace.unm.edu/>

*Hybrid meetings:*

* + Make sure the in-person speakers know where the camera and microphone are so they don’t wander away from view.
	+ Consider how online attendees will be able to hear comments from the audience – consider asking the speaker to repeat the question before answering, or have someone in the room type the questions in the Zoom chat. This person can also relay Zoom-based questions to the in-person event.

**ARRANGE SPEAKERS/PRESENTERS**

External speakers/presenters:

1. review UNM policies:
	1. Speakers from off campus: <https://policy.unm.edu/regents-policies/section-2/2-2.html>,
	2. Travel: <https://policy.unm.edu/university-policies/4000/4030.html>,
	3. Foreign nationals: <https://policy.unm.edu/university-policies/2000/2180.html>,
	4. Pcard travel: <https://pcard.unm.edu/pcard-for-travel/allowable--unallowable-purchases.html>
	5. Honorarium payments: <https://ua.unm.edu/honorarium-payments.html>
2. Book flight and hotel using Pcard (or speaker can book own and seek reimbursement after the event)
3. Reimburse speaker after event for per diem, ground transportation, and pay honorarium if applicable

**ARRANGE TRAVEL (attendees)**

UNM has negotiated rates with several local hotels, use the links from this website: [https://purchase.unm.edu/local-hotel-information/index.html?\_gl=1\*5ioelx\*\_gcl\_au\*MTE5NzIzNjY1NS4xNzE1MDkwMzY0](https://purchase.unm.edu/local-hotel-information/index.html?_gl=1*5ioelx*_gcl_au*MTE5NzIzNjY1NS4xNzE1MDkwMzY0)

Campus maps: [https://css.unm.edu/campus-maps/index.html?\_gl=1\*iv2wqt\*\_gcl\_au\*ODIwMTExMDM2LjE3MTU5NzI3NDg](https://css.unm.edu/campus-maps/index.html?_gl=1*iv2wqt*_gcl_au*ODIwMTExMDM2LjE3MTU5NzI3NDg).

ABQ visitor guide: <https://www.visitalbuquerque.org/plan-my-trip/travel-tools/guides/2024-digital-visitors-guide/>

**SET AGENDA**

* schedule presentations according to availability of speakers
* arrange for workshop facilitators
* if attendees will move between rooms, leave time to travel between events
* consider feeding your attendees for events 3+ hours or those occurring across meal times
* don’t forget to add a few breaks throughout the day!

**SET UP REGISTRATION**

Name, email, job title/field, any questions for attendees, dietary requirements

Google Forms are free and you can set them up to put responses into an Excel spreadsheet (forms.google.com)

**CREATE AND SHARE EVENT ANNOUNCEMENT**

UNM calendar: [https://unmevents.unm.edu/.](https://unmevents.unm.edu/)

UNM brand guidelines and logo usage information: <http://brand.unm.edu/>

**RESERVE TECHNOLOGY & FURNITURE**

If using space in the SUB, furniture and A/V equipment can be arranged through them (505-277-5498)

For furniture for events in outdoor/unfurnished spaces, pinboards for poster displays:
UNM Special Activities: <https://fm.unm.edu/services/special-activities-and-movers.html>

**ORDER CATERING**

**Policy**: [https://policy.unm.edu/university-policies/4000/4000.html?\_gl=1\*1107dcs\*\_gcl\_au\*ODIwMTExMDM2LjE3MTU5NzI3NDg](https://policy.unm.edu/university-policies/4000/4000.html?_gl=1*1107dcs*_gcl_au*ODIwMTExMDM2LjE3MTU5NzI3NDg).

**UNM Catering:**

**Until June 30, 2024:** <https://unmcatering.catertrax.com>

**After July 1, 2024:** [https://forms.unm.edu/forms/catering\_request\_form?\_gl=1\*1qlv4fl\*\_gcl\_au\*ODIwMTExMDM2LjE3MTU5NzI3NDg](https://forms.unm.edu/forms/catering_request_form?_gl=1*1qlv4fl*_gcl_au*ODIwMTExMDM2LjE3MTU5NzI3NDg).

**External catering**: <https://pcard.unm.edu/policies-and-procedures/approved--prohibited-uses.html#FR>

Considerations:

* UNM catering orders typically require about 10 days’ lead time so be sure to find out and set your registration deadline accordingly.
* Deadlines for external vendors value but a good rule is the bigger the event, the earlier you’ll want to set up your food order.
* Free events often have no-shows; you’ll be tempted to add extra food but try to keep the catering costs down by not overbuying.

Alcohol at events:

Policy 4000, 5.2.1.  Alcoholic Beverages

“Alcoholic beverages are allowable at hospitality events when such beverages are customary and reasonable considering the facts and circumstances of the particular event.  All on-campus use of alcohol must be consistent with [UAP 2140 (“Use and Possession of Alcohol on University Property”)](https://policy.unm.edu/university-policies/2000/2140.html) and be limited to beer and wine.  The amount expended for alcohol may not exceed thirty percent (30%) of the total amount expended for food. Alcohol normally may not be purchased with University funds for on-campus events at which only University employees are present.  Individual units of the University may establish their own internal policies on the purchase of alcohol that are stricter than the provisions of this policy.

No contract and grant funds may be used to purchase alcohol as a hospitality expense.”

* Typically you will need a licensed bartender to serve alcohol; on campus, this can be arranged via UNM Catering.
* Purchasing and serving alcohol creates some additional challenges so be sure to work on this early!

**ORDER/PREPARE SUPPLIES**

* Create a list of what you’ll need at least two weeks out so you have time to place a supply order.
* Attendee packets – folders, pens, swag, agenda, maps, meeting materials, feedback forms
* Event supplies – name badges/holders, giant note pads, post-its, markers
* Room supplies – extra pens, rubber bands, stapler, paper clips, power strips (if all day event)
* Flash drive(s) with presenter slides

**SET UP PARKING**

* Department hang tags: <https://pats.unm.edu/parking/unm-departmental-parking/index.html>
* Code for parking garage: Call Kathy at PATS – (505) 925-9580
* Attendees can pay own way: <https://pats.unm.edu/parking/visitors.html>

**CONSIDER PRINTING & NAME TAGS**

* agenda
* activities
* icebreakers
* name badges
* feedback forms, attendance sheet, or other info to collect

**SET UP ON THE DAY**

* set up registration table
* lay out attendee materials on tables
* front of room
	+ check tech
	+ load slides to laptop
	+ Zoomcheck mic(s)
	+ leave agenda at the front
* if catering, make sure space is set up correctly
* find trash bins and put them in visible locations near food and/or doors

**BREAK DOWN AFTER EVENT**

* Collect name badge lanyards if unwanted
* Collect feedback forms
* Pick up any reusable supplies (folders, pens, etc) not taken by attendees
* Collect and throw away trash/recycling
* Send out any follow ups (slides, minutes, next steps)