

LAUC-SD R&PD COMMITTEE INTERNAL
PROGRAM PLANNING CHECKLIST

University Hosted Events

What to consider http://blink.ucsd.edu/Blink/External/Topics/How_To/0.1260.18888.00.html

What type of event is it? <http://blink.ucsd.edu/Blink/External/Topics/Policy/0.1162.19575.00.html>

LAUC-SD R&PD budget index* number: _____

*An **index** (also called "index number") is a seven-character code that represents a combination of the fund, organization, program, and location elements of the Chart of Accounts. An index number is used with an account to code operating ledger transactions.

Typical Timetable

4 – 8 weeks BEFORE the program	
WHO	WHAT
	Determine subject of program
	Determine level of program (introductory, substantial experience)
	Determine budget requirements
	Determine partnerships/sponsorships options if appropriate (e.g., Training Coordinator, other LAUC – SD committees, library committees, campus departments)
	Decide on format (lecture, panel, workshop, webinar AND passive or participatory)
	Decide on the date, time, length
	Determine if open to LAUC-SD, library staff, campus attendees
	Estimate number of attendees
	Determine parking needs, if any
	Arrange with DBF for Faculty Club lunch, if needed
	Make committee member assignments:
	<ul style="list-style-type: none"> • Reserve a room (APPENDIX A) • Place catering order for refreshments (APPENDIX B) • Arrange parking for campus visitors and guests • Identify and make presenter arrangements (APPENDIX C) • Create and distribute publicity (APPENDIX D) • Arrange for technical support (APPENDIX E) • Develop registration procedure • Reproduce handouts (if needed) • Create program evaluation
2 – 4 weeks BEFORE the program	
WHO	WHAT
Library Training Unit	1 st notice: 5 wks prior: Save the date 2 nd notice: 4 wks prior: Promo, info and registration 3 rd notice: 2 wks prior: Tickler/Reminder message 4 th notice: 1 day prior: Tickler/Reminder message

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DAY OF the program	
WHO	WHAT
	Confirm room set-up & take-down is what was originally requested
	Confirm catering delivery set-up & take down is what was originally requested
	Preview & test media functionality on-site
	Set-up registration table (if needed)
	Sign-in sheet (if needed [DBF requires w/invoice if snacks are served])
	Distribute handouts including evaluation form
	Welcome, Introduction, reminder to complete evaluation
IMMEDIATELY AFTER the program	
WHO	WHAT
	Collect evaluation forms, left over handouts
SOON AFTER the program	
WHO	WHAT
	Give catering invoice and sign-in sheet to DBF
	Prepare program summary including financial details <ul style="list-style-type: none"> • Receipts go to LAUC-SD R&PD chair • Statistical breakdown of participants • Evaluation forms tally and summary
	Send thank you letter(s) to presenter(s)

APPENDIX A: Meeting Rooms and Contacts

1. Library meeting/event/conference rooms

Building or location	Geisel Library	Geisel Library	S&E Library (located East wing, Geisel Library)	Biomed Library (located outside Geisel Library)
Room	Seuss Room	Room 276	Events Room	Events Room
Reservation	REQUIRED: Use online calendar	REQUIRED: Use online calendar	REQUIRED: Use online calendar	REQUIRED: Use online calendar
Deadline	ASAP	ASAP	ASAP	ASAP
Food allowed	Yes	Yes	Yes	Yes
Room set-up furniture	Yes, may request either online or contact AA	No, default configuration only	No, default configuration only	Yes, may request either online or contact AA
Room set-up technology	Self-service. Instructions on lectern. Contact for problems: Mark Kasimatis	DSSL	DSSL	DSSL
Human contact, if needed	AA in Facilities		AA in S&E Library	AA in Biomed

2. [Campus conference rooms](#) Meeting rooms can be hard to find at UCSD. That's why Blink created the [Conference Room Search](#) tool. This tool enables you to:

- **Search for meeting space** on campus using criteria such as building, department, and seating capacity.
- **Share or promote meeting space** that's available in your area.

To find a meeting space:

- Go to [Conference Room Search](#) and enter your search criteria.
- On the Search Results page, click the **Room Name** link for more information.
- Check the room for use policies. Some conference rooms are for department use only.
- **If you don't find a room** in the Conference Room Search, check these organizations that also offer meeting space:

[RIMAC](#)
[Faculty Club](#)
[International Center](#)
[UCSD Health Sciences](#)
[Housing and Dining](#)
[Price Center and Student Center](#)

To add your meeting space to the search tool:

Go to the [Add a Conference Room](#) form, where you can enter and submit your room's information.

We'll ask for your final approval before the page is released.

You'll receive an annual request to review and update the information.

Additional resources:

[How to Plan a Conference at UCSD](#)
[Special Events in Classroom Space](#)

APPENDIX B: Refreshments & Policy on Serving Refreshments in Geisel Library

At UCSD, "**entertainment**" is the provision of meals or light refreshments for a bona fide UCSD business purpose. Entertainment usually involves a guest-host relationship in which a designated host invites an official guest or guests to attend an event. There should be no personal benefit to the person acting as host or to other employees.

Note: Recharge is a process that some UCSD departments use to handle the sale of goods and services to other departments. Departments that sell goods or services base the recharge amount on the cost of the item plus a service fee as approved by policy. The process requires the use of an index and assigns the charges directly to the ledger of the department making the purchase.

1. Standard Entertainment Policy

<http://blink.ucsd.edu/Blink/External/Topics/Policy/0,1162,2676,00.html>

2. UCSD Catering

<http://hds.ucsd.edu/catering/index.html>

3. Serving of Refreshments in Geisel Library

<https://libnet.ucsd.edu/policy/RefreshmentsPolicy.htm>

4. Serving of Refreshments in Libraries Outside Geisel Library

Contact individual library for its policies on serving refreshments in its meeting/event rooms.

APPENDIX C: Presenter Arrangements

Official Guest: An official guest is a person who renders a service to UCSD or is present at a UCSD meeting, conference, or event at the invitation of the host.

Honorarium: A payment in recognition of an individual's or organization's special service or distinguished achievement where propriety precludes setting a fixed price. A typical honorarium amount is \$250-\$500 per day, depending on the fund source and expertise of the speaker. Honoraria charged to 19900A funds are limited to \$250 per event day, for a maximum of 10 days. Amounts in excess of \$250 per day require academic personnel approval.

NOTE: Honorarium is the preferred and policy-supported procedure for recognizing a presenter's contribution. It is *extremely difficult* and *time-consuming* procedure to get funds approved to purchase a gift for a presenter in lieu of an honorarium.

1. [How to pay for an honorarium](#): People invited by UCSD to serve as guest speakers or participants in special events may be paid an honorarium. Honorarium payments are paid in lieu of reimbursement of travel expenses or any other payment of fees for service. [BLINK Honorarium FAQ](#)

2. Standard Expenses reimbursement

R&PD is able to pay for expenses within the limits allowed by the University, including transportation, lodging (for distant travelers), and meals.

- Use a personal form of payment and request reimbursement after the trip.
- Original receipts. Provide presenter with a pre-addressed envelope to mail-in receipts.
- If the presenter prefers, [Travel coordinator position in Dept of Business & Finance] can make reservations (e.g., flights, lodging.)
- On the day of the program, take the presenter to see [Travel coordinator position in Dept of Business & Finance] to sign travel forms.
- Keep Committee chair informed of expenses

Meal and Incidental Expense (M&IE) is a traveler's daily maximum for meals and incidental expenses (tips for service). M&IE is not the same as [per diem](#), which applies to long-term U.S. travel (30 days or more) and travel outside the continental U.S.

You can claim only the actual amount spent for M&IE, that amount cannot exceed the maximum:

\$42/ day for travel lasting 12 – 24 hours

\$64/ day for travel lasting 1 – 29 days

After 24 hours of travel, the maximum for each partial day of travel is rounded to the nearest 1/4 day (6 hours) and multiplied by \$64. For example, if travel lasts 28 hours, the second day of travel is 4 hours (rounded to 1/4 day, or .25, and multiplied by \$64), so your total maximum for day 2 is \$16.

NOTE: UC cannot pay expenses for a person who cannot legally work in the United States. Presenter must have proof of eligibility to work in the United States (e.g., work visa).

APPENDIX D: Publicity

Information needed to publicize the program

WHO: Presenter _____
WHAT: Name of program _____
WHEN: Date & time _____
WHERE: Location _____
HOW: RSVPs or not _____

Distribution depends on program content/appeal:

LAUC – SD Mailing list or LIB-ALL list and/or campus distribution list(s)

[BLINK How to publicize on campus](#)

Listservs/e-mail newsletters, electronic fliers:

UCSD campus notices via listserv: Use these to share information related to UC policy, salary, benefits and other employment-related matters; matters related to campus accounting, purchasing, and administrative systems procedures, safety and security matters; and any administrative notices that legally require the campus community to be official notified.

All notices require approval by the cognizant Vice Chancellor or the Chancellor. First, get approval from your director, then contact the assistant to the VC-ER for approval. Notices are distributed by means of an electronic UCSD-notices listserv.

See [how to format and submit your notice](#).

Questions? Contact [Deirdre Vernon](#), (858) 534-0103.

Student listserv: This opt-in e-newsletter is for students and other individuals who have subscribed to this service.

Read [submission requirements](#).

Submit announcements [via e-mail](#).

This Week@UCSD: This opt-in e-newsletter is for staff and faculty at UCSD. Send story ideas and completed news releases to [Janet Howard](#), (858) 534-1407. Include photos if possible.

If you think an event should be covered, but cannot write the release, contact writer [Ioana Patringenaru](#), (858) 534-0773.

Stories are due the Thursday before the Monday publication date, unless you make other arrangements.

UCSD electronic fliers: Use these for the majority of announcements regarding campus events, activities, and information of a general nature, e.g., music presentations, blood drives, etc. Fliers do not require a signator.

See [how to properly format notices](#).

Submit notices to adminrec@ucsd.edu for distribution.

Questions? Contact Deirdre Vernon, (858) 534-0103.

APPENDIX E: Technology & Equipment Access and Support Requirements

In-House Resources

Library resources vary from room to room. Ask early in the communication process what the presenter needs for his/her equipment and technology access. Typically people bring their own laptops these days so also ask if s/he will be using exotic software applications that the library may not support. His/her technology needs may determine which room to reserve:

- Capability to project from personal computing device to screen
- Internet access
- Laser pointer
- Podium
- Voice amplification (e.g., lapel, podium-mounted or handheld mic)
- Flipchart(s), easels, pens

Campus Resources

[Media Services Equipment Rental](#)

A variety of equipment is available for rent with a campus recharge number. Media Services will deliver and pick it up.