

Event Planning Guide



The goal of this resources is to help you think critically around event planning. Prior to planning an event, we encourage you to review the risk management policy of your respective organization and campus expectations so you have a full understanding of the policy and expectations around event planning.

While following the guidelines outlined in this guide will help to make any event safer, we recommend they be expressly followed when alcohol is present while on chapter premises or during a fraternity/sorority event, in any activity or event sponsored or endorsed by the organization, including those that occur on or off chapter premises.

For any questions around event planning, policy clarification, contract review, etc. please reach out to your national/international organization for further assistance. Throughout the resource, the phrase "suggested organizational guidelines" is used which infers what many organizations might use as policy / procedure language; however, it is best to compare this information to your national/international risk management policy.

For an App version of this resources, visit the App Store and download "HM Event Planner".

WHAT CONSTITUTES AN EVENT?

Any activity or event sponsored or endorsed by the organization, including those that occur on or off chapter premises.

Determining if the Event is on "Chapter Premises"

Is the event being hosted in your chapter house or a university-provided meeting space? Y N

If so, every event you host there is considered a chapter event.

Is the event being hosted in an on or off campus location where you traditionally hold your events? Y N

If so, events you host there would probably be considered a chapter event.

Determining an "Event" or "Activity" of the chapter:

The following factors are considered when determining whether an event could be considered an event or activity of the organization. Be honest and go through the list. The more your answers lean to yes, the more this is likely considered a fraternity event. That doesn't mean you can't host the event, that simply means you host the event in compliance with the policy.

Event Planning

Is the event being planned by one or more members/new members? Y N

Are the officers aware of the event being planned? Y N

Are any officers involved in event planning? Y N

Does the officers have prior knowledge of the event? Y N

Is the event actively or passively endorsed by a majority of the active chapter? Y N

Have members of the chapter lied about the event? Y N

If no members attended the event, would the event still happen? Y N

If a crisis occurred, would the chapter president take charge? Y N

Is the event a chapter tradition? Y N

Terminology

Are members attempting to rename the event to give the appearance that it isn't associated with the fraternity? Y N

Is the event being coined as "unofficial" or "unregistered"? Y N

Is the event occurring before or after an event ("pre-game" or "after party")? Y N

Communication

Is the event listed on a chapter calendar [public or private]? Y N

Is the event listed or advertised on the chapter website [public or private]? Y N

Is the event listed or advertised on social media accounts [e.g. Facebook, Twitter, GroupMe, Google Chats, etc.]? Y N

Do online invitations refer to the organization [e.g. Facebook events]? Y N

Will the event be announced at a chapter meeting? Y N

Will the event be marketed over the chapter texts/list serves? Y N

Is there a theme for the event? Y N

If guests were stopped on their way to the event, would they say they were going to a the "XYZ" event? Y N

If guests posted on social media, would they say they were at the "XYZ" event? Y N

Funding

Is the event financed by the chapter? **Y** **N**

Is the event being financed by collection of funds from a group of brothers? **Y** **N**

Location

Is the event being hosted on chapter property? **Y** **N**

Is the event being hosted in house/apartment/chapter annex/live outs where multiple members live? **Y** **N**

Is the event being hosted in university provided meeting space? **Y** **N**

Is the event being hosted in an on or off campus location where you traditionally hold your events? **Y** **N**

Attendance

Is the entire chapter invited? **Y** **N**

Are new members invited to attend? **Y** **N**

Are certain pledge classes invited to attend? **Y** **N**

Is a majority of the chapter invited? **Y** **N**

If a member/new member showed up, could he attend the event? **Y** **N**

Will members of the officers be in attendance? **Y** **N**

EVENT DETAILS

1. Who is planning the event?

Organization: _____

Name: _____

Officer Title: _____

Email: _____

Phone: _____

2. Name/Theme of event: _____

3. Date of the event: _____

4. Beginning time of event: _____ AM PM

5. Ending time of event: _____ AM PM

6. Location of event:

Chapter Property (Either fraternity or university owned)

Rented Facility (Hotel, Restaurant, etc.)

Member(s) Residence

Other: _____

7. Purpose of event:

Recruitment

Social/Mixer

Formal

Philanthropy

Service

Other: _____

8. Which best describes the event below? Check all that apply.

Dry event (no alcohol)

Member Event Only

Fundraiser

BYOB

Member and Date Event

Event with more than one fraternal organization

Philanthropy

Third Party Vendor at a location

Event with one other fraternity/sorority

Event with more than one other
fraternity/sorority

Event with one other non-fraternal student
group

Event with more than one non-fraternal student
group

New member event

Sport

Third Party Vendor at chapter facility

Parent Event

Event with non-fraternal organization

Recruitment

Service

9. The activities below could be considered high risk events. Does the planned event contain any of the following?
- | | |
|---|---|
| <input type="checkbox"/> Bring your own gun (trap/skeet shooting) | <input type="checkbox"/> Bonfires |
| <input type="checkbox"/> Sky diving/ parasailing/bungee jumping | <input type="checkbox"/> Tug-o-war |
| <input type="checkbox"/> Boxing tournament | <input type="checkbox"/> Rock Climbing |
| <input type="checkbox"/> Building of temporary structures | <input type="checkbox"/> Team building events that include make-shift ropes courses, trust falls, blindfolded guided walks (etc.) |
| <input type="checkbox"/> Pools | <input type="checkbox"/> Events take place at heights more than one to two feet from the ground |
| <input type="checkbox"/> Mechanical Bulls | <input type="checkbox"/> Event with live animals present (e.g., rodeo, petting zoo). |
| <input type="checkbox"/> Bounce Houses/Inflatables | |
| <input type="checkbox"/> Slip & Slides/Any other water feature | |
| <input type="checkbox"/> Obstacle course | |
| <input type="checkbox"/> Contact sports (e.g. football, rugby) | |
| <input type="checkbox"/> Other: _____ | |

10. Have any written contract or agreement been signed for any part of this event? **Y** **N**
 (See [Contracts Template for Third Party Vendors](#) if a Vendor does not present a contract to you. Also found on pp. 14-15)

- Food caterer: _____
- Security guards: _____
- Bus/transportation company: _____
- Third party vendor: _____
- University facility: _____
- Hotel venue: _____
- Sports field: _____
- DJ: _____
- Band: _____
- Artist: _____
- Restroom and Waste Management: _____
- Other: _____

HOW WILL ALCOHOL GET TO THE EVENT?

Common organizational recommendations allow chapters to host events with alcohol in one of two ways. *Please consult your national/international risk management policy for additional guidance and policy information.*

BYOB [Bring Your Own Beverage]

Everyone brings their own alcohol, including members, new members, guests, and alumni who are over the age of 21

Third-Party Vendor [Bars, Restaurants, Catering Companies, Hotels, Etc.]

Contract with a licensed establishment or caterer to provide a cash bar and/or a licensed location to host your event.

Dry Event [No alcohol will be present]

MAKING BYOB EVENTS WORK

[See [BYOB Checklist](#)]

1 // Are there any university or Fraternity/Sorority policies that deal with BYOB events on campus?
 Y N

Are there any university or Fraternity/Sorority policies that deal with BYOB events off campus?
 Y N

If so, what do those policies say? *[Do they require a specific check-in procedure? Do they limit the number of drinks a guest can bring?]*

2 // All members and guests should be "carded" at the door to verify their age. Who is checking members' and guests' IDs at the door?

- Chapter members
- New members *[NOT recommended unless chapter members are also participating]*
- The campus police provide someone to check IDs
- The chapter has hired a security company [see [Security Vendor Checklist](#)]

3 // How are you marking the guests, members, and new members who are of the legal drinking age [i.e. 21 and over]?

- Wristbands that have been dated and marked for that event
- Specific hand stamp that is unique to the event
- Other [Describe]: _____

4 // How many drinks will you allow each person of legal drinking age to bring to the social event?
Common organizational recommendations state no hard liquor and a reasonable limit on the amount and types of alcohol (i.e. 6-pack of beer, 1 bottle of 750 ml wine, four pack of wine coolers/ciders/malt beverages, etc.)

Beer: # _____
Wine Coolers: # _____
Ciders: # _____
Wine: # _____
Malt Beverages: # _____
Other: # _____

5 // How will you manage the service distribution center?

Where will the service distribution center be located? _____
Common organizational recommendations suggest you establish one centralized location [not a member's room] for checking in and distributing alcohol.

How many sober members will be assigned to work the service distribution center? _____

Which best describes the sober monitors? Check all that apply:

- Chapter members
- New members
If you utilize new members, it is recommended it is in conjunction with members.

- The university provides someone to distribute alcohol
- The chapter has hired a vendor to distribute alcohol

How many drinks will a member or guest be permitted to take at a time? _____

6 // How will members and guests check in and collect their alcohol?

Ticket System

Each member/guest is given one ticket per drink s/he checks in at the party.

The tickets are personalized with the type of drink the guest brings [e.g. Miller Lite, Smirnoff Ice, etc.].

The name of the attendee is written on the tickets.

The member/guest's drinks are delivered to the service distribution center by a member who is working the social event.

The member/guest redeems tickets [one at a time] for his/her drinks at the bar.

Punch Card System

Each member/guest is given one punch card that has marks for each drink s/he checks in at the party.

The punch card is personalized with the type of drink the guest brings [e.g. Miller Lite, Smirnoff Ice, etc.].

The name of the member/guest is written on the punch card.

The member/guest's drinks are delivered to the service distribution center by a member who is working the social event.

The member/guest's ticket is punched or marked at the bar each time s/he claims one of the drinks s/he brought.

Other [Describe]:

7 // How will you monitor that members, new members, and guests are only drinking the alcohol they brought and checked in at the social event? _____

8 // Will leftover alcohol be discarded or made available for pick up the next day by those who brought it to the event? _____

PLANNING A THIRD-PARTY VENDOR EVENT

What is a Third-Party Vendor?

Examples of Third Party Vendors include bars, restaurants, catering companies, hotels, etc. *Third Party Vendors are NOT individuals who work as bartenders.*

Planning the Event

- 1 // Are there any university or Fraternity/Sorority policies that deal with Third Party Vendor events on campus? **Y** **N**
Are there any university or Fraternity/Sorority policies that deal with Third Party Vendor events off campus? **Y** **N**

If so, what do those policies say? [Do they require a particular amount of insurance? Do they limit the type of alcohol that can be purchased?]

- 2 // Have you reviewed your chapter's contract with the Third Party Vendor? *It is recommended that you reach out to your headquarters for contract questions and review.*

The contract should be signed and dated by both the person authorized by your respective organization (i.e. chapter president, advisor, etc.) and the vendor. In doing so, both parties understand that only through compliance with these stipulations will the chapter be in compliance with Inter/national fraternity requirements.

(see [Contracts Template for Third Party Vendors](#) if a Vendor does not present a contract to you. Also found on pp. 14-15)

- 3 // All members and guests should be "carded" at the door [and again at the time of purchase] to verify their age. Who is handling this at the door?

- The Third-Party Vendor *[Recommended]*
- The chapter has hired a security company [see [Security Vendor Checklist](#)]
- Chapter members
- New members *[NOT recommended unless chapter members are also participating]*

- 4 // How are you marking the guests, members, and new members who are of the legal drinking age [i.e. 21 and over]?

- Wristbands that have been dated and marked for that event
- Specific hand stamp that is unique to the event
- Other *[Describe]:* _____

BUILDING A GUEST LIST

1 // Are there any university or Fraternity/Sorority policies that limit the number of guests per member for chapter events? Y N

If so, what do those policies say?

2 // Do the math. Suggested organizational guidelines are **two to three guests** per member/new member at events.

How many members and new members do you plan to have at the event?

How many guests per member /new member will you allow at the event?

This is the total number of guests you can invite to your social event.

The total number of attendees [members and guests] should not exceed fire code capacity for the venue.

X

=

3 // Figure out how members will add names to the guest list. [see [Building A Guest List](#)]

Spreadsheet or Sign-Up List

Create a spreadsheet and allow members to add guests' names.

Bring the list to a chapter meeting, post it online, or hang it on a bulletin board in the chapter facility.

Each member and new members' name should be on the list next to a blank space for each guest they're allowed to invite [e.g. two guests per member/new member].

Numbered Invitations

Distribute numbered invitations to each member/new member to give to his guests.

These invitations should be printed professionally or created in a way so they can't be easily copied. Tickets cannot be sold or bartered.

Keep a list with each member/new member's name on it and the numbers of the invitations they were given.

During the event, keep a sign-in sheet at the door and write the guest's name next to the invitation number as s/he turns in the invitation.

Closed Facebook Event

Create a closed [non-recurring] event with a specific start and end time.

Do NOT allow friends to extend the guest list.

Set the Privacy to "Invite Only."

A designated officer [e.g. Risk Management Chairman] should be set as the Host and administrator for the event.

Each member/new member should submit the names of guests to the Host for invitation to the event OR the Host should designate a specific period of time during which members will be given access to add guests to the event.

Other [Describe]: _____

4 // How many hours in advance will the guest list be closed? _____

Suggested organizational guidelines recommend the guest list be closed at least 24 hours prior to the event.

MANAGING THE EVENT

Theme

1 // Does the event have a theme? **Y** **N**

If yes, what is the theme? _____

Event themes should NOT be disrespectful or degrading to any person or population. When selecting a theme, ensure it:

- Does NOT rely on the stereotypes of certain groups.
- Does NOT encourage offensive dress or costumes.
- Does NOT stereotype men or women.
- Is NOT sexist. If you're unsure, try interchanging the word/theme with a racial word/theme.
- Is NOT centered on making fun of a particular group of people, culture, or organization.
- Does NOT lend itself to members, new members, or guests taking the theme to a place that is disrespectful or degrading.

Event Monitors [see [Event Monitor Resource](#)]

1 // Who will your officer in charge be for the event?

2 // How many event monitors will you have at the event?
Suggested organizational guidelines are one event monitor for every 15 attendees.

3 // What is the system/process for selecting event monitors?
Suggested organizational guidelines utilize a fair ratio of brothers/new members and not using new members only.

4 // List the names / phone numbers for the assigned event monitors.

5 // How will you identify event monitors during the event so a member/guest could easily recognize them?

6 // What are the responsibilities of the event monitors during the event?

- Check members' and guests' IDs at the door to verify their age
- Manage the guest list at the door
- Mark the guests, members, and new members who are of the legal drinking age [i.e. 21 and over]
- Monitor members' and guests' policy compliance
- Other [Describe]: _____

7// Are you hiring security for the event? If so, what are their responsibilities?

8// Is the venue providing security for the event? If so, what are their responsibilities?

Transportation

1 // Will you provide transportation to and from the event? **Y** **N**

If so, how?

- Licensed transportation vendor [e.g. charter bus]
- Campus safe ride program

- Pre-paid cab service
- Designated driver program *[consult the risk management policy of your organization prior to selecting this option // see [Designated Driver Guidelines](#)]*
- Other [Describe]: _____

2 // What is the process/plan to ensure members/guests utilize the method of transportation both to and from the event?

Construction/Decorations

1 // Will there be any special construction/decorations for this event? **Y** **N**

If yes, please describe: _____

Persons and/or company performing construction and contact information:

Company Name: _____ Contact: _____

Prevention Questions

1 // How many entrances will there be to the party? _____

It is safest to only have ONE entrance to the event.

2 // Is this event is planned to exceed five hours in duration? **Y** **N**

Please explain why this event will exceed five hours. _____

3 // Will ample food, other than snacks and non-alcoholic beverages be available? **Y** **N**

Who will provide the food? _____

What food/beverages will be served? _____

4 // Are glass bottles prohibited from the event? **Y** **N**

5 // Will this event involve any physical activity? **Y** **N**

6 // Will doors to residential living be locked / secured during the event? **Y** **N**

7 // Will you stop the service of alcohol at least one hour before the event ends? **Y** **N**

8 // Will you select music that is NOT disrespectful or degrading to a particular group of people or culture? **Y** **N**

9 // Will you ensure no illegal drugs and controlled substances are at the event? **Y** **N**

10 // Will you ensure there are no tables or paraphernalia within the event that are used for drinking games? **Y** **N**

11 // Will you ensure the event does NOT involve strippers, exotic dancers, or similar, whether professional or amateur.

Y **N**

12 // Please describe any specific prevention plans for the above areas. _____

Crisis Management Plan

1 // Do you have a crisis management plan in place for the event? **Y** **N** [see [Crisis Management Plan](#)]

If yes, please describe:

2 // Will emergency services be readily available at the event? **Y** **N**

3 // Who is the officer in charge to contact emergency services?

Name: _____

Phone: _____

Title: _____

Email: _____

4 // If the need for assistance arises, who will be responsible for contacting:

- Emergency personnel
- Chapter President
- Chapter Advisor
- House Corporation President
- Fraternity Headquarters
- University Officials

Name: _____

Phone: _____

Title: _____

Email: _____

Educational credit goes to FIPG, Pi Kappa Phi Fraternity and the North-American Interfraternity Conference for portions of this resource.

No portion of this resource should be used for commercial purposes.

CONTRACT TEMPLATE FOR HIRING THIRD-PARTY VENDORS

You may request the Third-Party Vendor include your organization as an Additional Insured on their policy

The contract template is intended to be used in the absence of the Vendor or Venue presenting a contract to the chapter and requesting it be executed. The template includes the fundamental things a chapter should request of a Third-Party Vendor when retaining the Vendor to provide services for a chapter function held at the chapter facility.

ADDITIONAL INSURED

Please note that if the chapter is hosting a function at a Venue, it is possible and reasonable for the Venue to request proof of General Liability insurance from the chapter as well as request that the chapter include the Venue as an Additional Insured on the policy, which is documented by providing the Venue a Certificate of Insurance.

The difference between a Certificate of Insurance (COI) and an Additional Insured:

- A Venue requesting to be listed as a certificate holder on the COI is merely being provided proof that there is insurance in force. They have no legal rights under the contract of insurance.
- Listing the party as an additional insured on the COI makes them an "Insured" under the policy creating legal rights under the contract.

To request a COI or Additional Insured, submit the following 30 days in advance of the event:

- Complete copy of written document making the request
- Complete contact information for party making the request
- Event details for the event

We encourage you to reach out to your Inter/National organization for a contract review and recommend that all chapters follow the Intern/National Organizations' event approval/review protocols that are in place. We further recommend that any chapter requesting exceptions deviating from the Vendor/Venue requirements outlined within the attached contract template, such as failure to obtain Additional Insured status from a Vendor/Venue, be fully vetted and reviewed by the Inter/National Organization.

Name of Vendor/Venue:

Chapter Name and Inter/National Organization:

Date of Event:

Beginning/End Time of Event:

Address of Event:

BY SIGNING THIS AGREEMENT, THE VENDOR/VENUE AGREES TO THE FOLLOWING TERMS:

1. The Vendor is properly licensed by the appropriate local and state authority. This requires both a liquor license and a temporary license to sell on the premises if the function will not be held at the Vendor's normal place of business. (You may request a copy of the license.)
2. The Vendor carries General Liability Insurance with minimum required limits of \$1,000,000 per occurrence and \$2,000,000 aggregate, evidenced by a properly completed Certificate of Insurance prepared by the insurance provider. (Request a copy of the Certificate of Insurance.) The Certificate of Insurance should also show evidence that the Vendor has, as part of its coverage, "Liquor Liability coverage and Hired and Non-Owned Auto Liability coverage." The Certificate of Insurance should name as Additional Insured (at a minimum) the local chapter of the fraternity hiring the Vendor as well as the Inter/National fraternity with whom the local chapter is affiliated.
3. The Vendor/Venue agrees to defend, indemnify and hold the Inter/National Fraternity and the local chapter harmless for loss, damages, expenses, including reasonable attorney fees, arising out of the negligence of the Vendor, its employees, sub-contractors and agents.
4. The Vendor assumes in writing all the responsibilities that any other purveyor of alcoholic beverages would assume in the normal course of business, including but not limited to:
 - a. Check identification cards upon entry
 - b. Identify those who are of legal age to consume alcohol
 - c. Per-drink sales only during the function
 - d. Refrain from serving minors
 - e. Refrain from serving individuals who appear to be intoxicated
 - f. All alcohol sales are cash/credit per drink to individuals
 - g. Maintain absolute control of ALL alcoholic containers present
 - h. Collect remaining alcohol at the end of a function and remove all alcohol from the premises
 - i. No excess alcohol - opened or unopened - is to be given, sold or furnished to the chapter

THE CHAPTER AGREES TO COMPLETE THE FOLLOWING:

1. Attach copies of state and local licenses to this checklist
2. Attach a copy of the Certificate of Insurance and highlight required clauses

Chapter Representative's Signature & Date
*Signing on behalf of the local chapter
for the Inter/National organization*

Vendor's Signature/Company & Date