HOLMES MURPHY FRATERNAL PRACTICE

EVENT PLANNING GUIDE

The goal of this guide 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 the 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 situation sponsored or endorsed by the chapter, or at any event an observer would associate with the fraternity.

For any questions around event planning, policy clarification, contract review, etc. please reach out to your national/international organization for further assistance. Throughout the guide 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.

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WHAT CONSTITUTES AN EVENT?

Defining an "event" is often challenging; however current suggested organizational guidelines define this as "while on chapter premises or during a fraternity event, in any situation sponsored or endorsed by the chapter, or at any event an observer would associate with the fraternity."

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.*

Applying the "Reasonable, Objective Observer" Standard

The following factors are considered when determining whether an event could be considered an event by a reasonable, objective observer.

Is the event being hosted or planned by one or more members of the chapter and supported by the Executive Council?   **Y   N**

Is the event financed by the chapter and/or being hosted on chapter property?   **Y   N**

Is the event being hosted or planned by one or more members and supported by members/associate/new members?   **Y   N**

Does the Executive Council have prior knowledge of the event?   **Y   N**

Is the event listed or advertised on the chapter website or social media accounts [e.g. Facebook, Twitter, etc.]?   **Y   N**

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

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

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

Will members of the Executive Council be in attendance?   **Y   N**

Will the event be marketed over the chapter listserv?   **Y   N**

Are members attempting to rename the event in order to give the appearance that it isn't associated with the fraternity?   **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**

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**

EVENT DETAILS

1. Who is planning the event?
   Organization:
   Name:
   Officer Title:
   Email:
   Phone:

2. Name of event:

3. Location of event:
   Chapter Property (Either fraternity or university owned)
   Rented Facility (Hotel, Restaurant, etc.)
   Member(s) Residence
   Other:

4. Beginning time of event: AM   PM

5. Ending time of event: AM   PM

6. Purpose of event:
   Recruitment
   Social/Mixer
   Formal
   Philanthropy
   Service
   Other:

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

   Dry event (no alcohol   Event with non-fraternal organization

   Member Event Only   Recruitment

   Fundraiser   Service

   BYOB   Event with one other fraternity/sorority

   Member and Date Event   Event with more than one other

   Event with more than one fraternal organization   fraternity/sorority

   New member event   Event with one other non-fraternal student

   Sport   group

   Third Party Vendor at chapter facility   Event with more than one non-fraternal student

   Parent Event   group

8. The activities below could be considered high risk events. Does the planned event contain any of the following?

   Bring your own gun (trap/skeet shooting)   Mechanical Bulls

   Sky diving/ parasailing/bungee jumping   Bounce Houses/Inflatables

   Boxing tournament   Slip & Slides/Any other water feature

   Building of temporary structures   Obstacle course

   Pools   Contact sports (e.g. football, rugby)

4

Bonfires
Tug-o-war
Rock Climbing
Team building events that include make-shift ropes courses, trust falls, blindfolded guided walks (etc.)
Other:

Events take place at heights more than one to two feet from the ground
Event with live animals present (e.g., rodeo, petting zoo).

9. Have any written contract or agreement been signed for any part of this event?   **Y**   **N**

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?

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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?

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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.

The contract with the Vendor should:

CERTIFICATE OF INSURANCE:

Be properly insured with a minimum of $1,000,000 of general liability insurance, evidence by a properly completed certificate of insurance prepared by the insurance provider. (You can request a copy of the certificate of insurance.)

The certificate of insurance should also show evidence that the vendor has, as part of his coverage, "off premise 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.

LICENSE:

Be properly licensed by the appropriate local and state authority to sell liquor on the premises where the function is to be held. (You can request a copy of this license.)

CONTRACT:

The contract should only be executed in the name of the undergraduate chapter (ex. Beta Kappa Chapter of XYZ Fraternity).

The venue should assume in writing all responsibilities that any other purveyor of alcoholic beverages would assume in the normal course of business, including but not limited to:

a) Per-drink sales only, collected by the vendor, during the function;
b) Checking identification card upon entry;
c) Not serving minors;
d) Not serving individuals who appear to be intoxicated;
e) Maintaining absolute control of all alcoholic containers present;
f) Collecting all remaining alcohol at the end of a function (no excess alcohol—opened or unopened—is to be given, sold or furnished to the chapter);

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g) Removing all alcohol from the premises;
h) Facility provides security for the event.

In addition; the contract should NOT include the following:
a) Drink specials for members/guests as part of the room rental fee
b) A set amount of free alcohol [e.g. 10 free pitchers, 40 free well drinks, two free drinks per member, etc.]
c) A minimum amount of alcohol sales during the event
d) Free drinks for officers and organizer or drink specials

Contractual indemnification language should be in favor of the chapter or at a minimum it should provide mutual indemnification. (Think of it this way, if you hire a catering company that is responsible to check IDs and serve alcohol, the vendor should defend the chapter if they fail to do what they were paid to do, which results in a claim or lawsuit.)

Confirm the TPV's liability policy includes a Waiver of Subrogation Clause favoring the Chapter.

The Chapter should be added as an Additional Insured on a primary basis to each TPVs Liability and Auto Policy.

Obtain proof that Workers Compensation coverage is in place for their employees.

Obtain a Certificate of Insurance from TPV confirming required coverages and Additional Insured protection is in place.

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
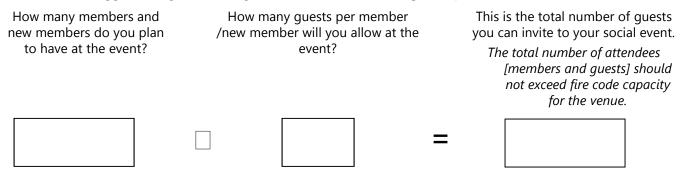>
> Other *[Describe]:*

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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.*
	☐		=	

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.

Sober Monitors   [see Sober Monitor Resource]

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

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

3 //   What is the system/process for selecting sober 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 sober monitors.

Name	Number	Name	Number

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

6 //   What are the responsibilities of the sober 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]:

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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**

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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:

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