



# Social Event Planning Guide

A resource for collegiate chapters completing Event Guidelines for events with and without alcohol.

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# INTRODUCTION

This document should be used as a resource in completing event guidelines for events with and without alcohol. This packet itself does not need to be submitted; rather, this should be used as a resource to ensure you are properly following the event guidelines procedures and have submitted all required documentation for your event. This resource explains in detail each requirement from the Event Guidelines checklists for events with and without alcohol.

## [CLICK HERE TO ACCESS THE EVENT GUIDELINE COLLEGIATE CHECKLIST FOR EVENTS WITH ALCOHOL](#)

What constitutes a chapter event or an event associated with Delta Gamma? Based on the Delta Gamma Collegiate Alcohol Policies and Responsibilities, any event which a reasonable observer or a campus official may associate with Delta Gamma, perhaps because of attire, conduct, or the affiliation of the individuals involved, is considered a chapter event and must be approved through the Event Guidelines process.

Still not sure? Here are some questions to ask to determine if an event is a chapter event:

- Is the event being hosted or planned by one or more members of the chapter and supported by any of the officers?
- Is the event being financed by the chapter and/or being hosted on chapter property?
- Do the officers have prior knowledge of the event?
- Is the event listed or advertised on chapter social media accounts, GroupMe, etc.?
- Do online invitations refer to the organization (e.g. Facebook event)
- Is the event listed on a chapter calendar (public or private)?
- Will the event be announced before, during, or after a chapter meeting?
- Will officers be in attendance?
- Will the event be marketed over the chapter email listserv?
- Are members attempting to rename the event in order to give the appearance that it isn't associated with the chapter?
- If guests were stopped on their way to the event, would they say they were going to the organization's event?
- Is the event actively or passively endorsed by a majority of the chapter?

If you answered **“yes”** to any of the above questions, this is likely a chapter event. Ask your advisory team chairman (ATC) or contact Executive Offices if you have any further questions.

## **Why is it important to get events properly approved through the Event**

## **Guidelines process?**

- Events that have not obtained the required approvals or are not conducted in compliance with Delta Gamma's policies and procedures as well as any applicable campus policies or city, state, provincial or federal laws, are not covered by the Fraternity or the chapter's liability insurance coverage.
- Conduct at unregistered events, even if they are completely private, which violate Delta Gamma policies and procedures, may subject the individuals involved to disciplinary action and may constitute a chapter incident requiring assessment.

Who should we contact if we have questions about Event Guidelines?

- Your advisory team chairman is a great resource in assisting you with the Event Guidelines process and gives the final approval on Event Guidelines for events without alcohol.
- Your operations specialist at Executive Offices is available to assist you with any questions you may have about the Event Guidelines process and gives the final approval on Event Guidelines for events with alcohol. You can email your operations specialist or call (614) 481-8169 for any assistance you may need. Business hours at Executive Offices are Monday through Friday from 9 a.m. to 5:00 p.m. ET.

## START HERE:

### IS YOUR EVENT WITH OR WITHOUT ALCOHOL?

If you will not have alcohol at your event, go to [page five](#). You will need to complete the event guidelines form for events without alcohol, which will be submitted to your advisory team chairman (ATC) for approval. If you will have alcohol at your event, go to [page seven](#). You will need to submit your event guidelines and supplemental paperwork via Anchorbase, which will be approved by your operations specialist at Executive Offices.

# PART I: PLANNING GUIDE FOR EVENTS

## WITHOUT ALCOHOL:

You will need to complete the event guidelines form for events without alcohol, which is submitted to your ATC. Below is an outline of the requirements for events without alcohol, with some information to help you through this process.

**Deadline:** Submit to your ATC four weeks before the event (recommended).

### Scheduling Requirements

- ☐ The event is listed with the correct date and time on your Anchorbase calendar.
- ☐ Your Regional Collegiate Specialist (RCS)/Council Appointed Coordinator (CAC)/New Chapter Coordinator (NCC) has approved the most recent version of your Anchorbase calendar. Your calendar has also been approved by the chapter, following RCS approval.

### Venue

- ☐ If you are renting/reserving a specific facility or area of a facility for a fee, or if you are being offered any services by the venue, then a venue contract is needed. This must be signed by the venue representative, chapter president and vp: finance. Email a copy to your ATC. Remember, no chapter member/officer except the president and vp: finance are permitted to sign contracts.
- ☐ If the activity is athletic, physical or dangerous in nature (such as a ropes course, ice skating, Anchor Games, etc.), and the venue is not a campus facility, you must secure a copy of the venue's Certificate of Liability Insurance (COI). This must be current (not expired) through the date of your event and should carry at least \$1 million in general liability coverage. Email a copy to your ATC.
  - As a chapter officer, you are probably familiar with risky events, even when there is no alcohol involved. What may have been an "ordinary daily activity" might keep you up at night. Please contact your events and operations specialist with questions about what is considered a "risky event."
- ☐ If you are using a security company separate from the venue, to ensure the safety of your attendees, you will need to secure a contract from the security company signed by a company representative, the chapter president and the vp: finance. You also must secure a copy of the security company's Certificate of Liability Insurance (COI). This must be current (not expired) through the date of your event and should carry at least \$1 million in general liability coverage. Email a copy to your ATC.

### Guests

- ☐ If non-initiated members of Delta Gamma are being invited to and/or attending the event, including new members, dates, guests, family, etc., then you will need an event guest list including the names of members, new members and guests attending the event. Email a copy of the guest list to your ATC.

## Transportation

- ☐ If you are traveling more than one mile from campus or the chapter house, transportation must be provided. All transportation paperwork must be emailed to the ATC. The ATC will determine the type of transportation required. Please see transportation specifications below.
- ☐ If you are traveling less than one mile from campus or the chapter house, you may walk as a group. Submit a written plan of the meeting place for all attendees, meeting time and the route you will be taking to the ATC.

### **Requirements when using third party transportation:**

- ☐ A transportation contract, signed by a representative from the transportation company, the chapter president and the vp: finance is required.
- ☐ Securing a copy of the transportation company's Certificate of Liability Insurance (COLI) is required. The certificate must be current (not expired) and the company must have at least \$1 million in general liability coverage.

### **Requirements when driving:**

- ☐ Approval must be granted from your ATC.
- ☐ All members and new members who are driving must sign the Driver Agreement. This document is only required when chapter members are driving each other to the event.

**The event without alcohol can only be held once you have received approval from your ATC.**

# PART II: PLANNING GUIDE FOR EVENTS WITH ALCOHOL

## Deadline:

- **Required Initial Submission:** One week before the event via Anchorbase. If you miss a few items at the initial submission date, that's okay, but your submission must be complete by the final deadline.
- **Final Deadline:** Two business days before the date of the event. All required items and documentation must be submitted to your operations specialist via Anchorbase.

\* Business days are Monday-Friday. Your operations specialists are available to assist you during Executive Offices' hours of Monday-Friday from 8:30 a.m.-5:00 p.m. Eastern Time.

If your event is on...	Your required initial submission date is...	Your final deadline is...
Monday	Monday, one week prior to the event.	The Thursday prior to the event.
Tuesday	Tuesday, one week prior to the event.	The Friday prior to the event.
Wednesday	Wednesday, one week prior to the event.	The Monday prior to the event.
Thursday	Thursday, one week prior to the event.	The Tuesday prior to the event.
Friday	Friday, one week prior to the event.	The Wednesday prior to the event.
Saturday	Saturday, one week prior to the event.	The Thursday prior to the event.
Sunday	Sunday, one week prior to the event.	The Thursday prior to the event.

## Scheduling Requirements

- ☐ Your RCS/CAC/NCC has approved your Anchorbase calendar. Any changes or additions to the originally approved calendar have been voted on by the chapter and approved by your RCS/CAC/NCC.
- ☐ The event is listed with the correct date and time on your Anchorbase calendar.
  - Remember that an event with alcohol cannot occur within 24 hours before and 24 hours after a Foundation fundraising event, Inspiration, and Initiation, in addition to 24 hours after Big/Little Sister Revealing. For more details, please reference the [Collegiate Alcohol Policy](#).

## EVENT DETAILS (submitted in a task via Anchorbase)

- Event Name: \_\_\_\_\_
- Event Date: \_\_\_\_\_
- Event Time: \_\_\_\_\_
- Event Theme\*: \_\_\_\_\_

## Theme Rules Apply to Events With and Without Alcohol:

\*A theme that focuses on socioeconomic status, nationalities, gender roles, religious customs or celebrations, drinking or drug use, violence, overt sexual references or tragedies **will not** be approved by Executive Offices. Remember that your event theme must align with Delta Gamma's values. If you have questions on the appropriateness of a theme, please contact your operations specialist.

### **Basic Tasks and Requirements:**

- ☐ The ATC has completed her approval task at the bottom of your event submission form in Anchorbase.
- ☐ The vp: social standards has completed her approval task at the bottom of your event submission form in Anchorbase.
- ☐ Non-salted food is being provided at the event in ample quantities, such as pizza, chicken tenders, party subs, meat/cheese trays, vegetable/fruit trays, etc.
  - Budget at least \$1 for each person attending for food.
- ☐ You have identified your ICE (in case of emergency) contact and have their name and phone number to submit via Anchorbase. This cannot be a student or parent. An adviser is recommended.
- ☐ You have a list of all people attending the event, including members, new members, dates and guests, with their names and whether they are over/under the age of 21. If having dates at the event, the date's name should be listed next to the Delta Gamma's name with their name and whether they are over/under 21. If co-sponsoring an event with another organization, you must submit a list of their event attendees as well, specifying who is over/under 21, with your Anchorbase submission.
- ☐ Number of Attendees at the event: \_\_\_\_\_
  - The number of attendees should reflect all those attending the event, not solely Delta Gammas.
  - This number is important as it determines the number of security guards that must be present at the event (1 per 50 attendees).

### **Venue Requirements:**

- ☐ A Delta Gamma Facilities Agreement has been completely filled out and signed by a venue representative, the chapter president and the vp: finance. If the venue is requesting for you to sign their contract instead of the Delta Gamma Facilities Agreement, you must send this to your operations specialist prior to signing.
  - The Facilities Agreement must include the following:
    - Ample non-salted food is being served. If the food is not being provided by the venue (e.g., you are hiring an outside catering company, etc.), then this does not need to be included in the facilities agreement.
    - If the venue provides alcohol, the bar must be a cash bar, paid for by individual members when they purchase their drink. Chapter



funds cannot be used to purchase alcohol. If the alcohol is not being provided by the venue (e.g., you are hiring an outside catering company, etc.), then this does not need to be included in the facilities agreement.

- The bar must close 30 minutes prior to the end of the event. If the alcohol is not being provided by the venue (e.g., you are hiring an outside catering company, etc.), then this does not need to be included in the facilities agreement.
  - There must be 1 security guard per 50 attendees (round towards the closest 50). Example: You would need two security guards for 120 attendees but three security guards for 130 attendees. If security is not being provided by the venue (e.g., you are hiring an outside security company, etc.), then this does not need to be included in the facilities agreement.
- ☐ You have obtained a Certificate of Liability Insurance (COI) from the venue. \$1 million in general liability coverage is required. If the venue is serving alcohol, \$1 million in liquor liability is also required. The COI cannot be expired.
  - ☐ If the venue is providing alcohol, you have obtained a copy/photo of their liquor license (even if only beer/wine is being served). It must be current through the event (not expired) and list the venue's name or parent company. This is typically displayed in a visible location within the venue.

#### **Security Requirements (if the venue is not providing security):**

- ☐ An [Independent Contractor Agreement](#) for security has been completely filled out and signed by a security company representative, the chapter president, and the vp: finance. If the security company is requesting for you to sign their contract instead of the Delta Gamma Independent Contractor Agreement, you must send this to your operations specialist prior to signing.
  - Remember, you must have 1 security guard per 50 attendees, rounding towards the closest 50.
- ☐ You have obtained a Certificate of Liability Insurance (COI) from the security company. \$1 million in general liability coverage is required. The COI cannot be expired.

#### **Beverage Provider Requirements (if the venue is not providing alcohol):**

- ☐ A contract has been signed by the beverage provider company representative, the chapter president and the vp: finance. Be sure that the company's contract includes the following:
  - The bar must be a **cash bar**, paid for by the individual members when they purchase their drinks. Chapter funds cannot be used to purchase alcohol.
  - The bar must close 30 minutes prior to the conclusion of the event.
- ☐ You have obtained a Certificate of Liability Insurance (COI) from the beverage provider company. \$1 million in general liability coverage, and \$1 million in liquor liability coverage is required. The COI cannot be expired.

- ☐ You have obtained a copy/photo of their liquor license. It must be current through the event (not expired) and list the company's name.

### **Transportation Requirements:**

- ☐ If you are traveling more than one mile from the campus of the chapter house, transportation must be provided. Complete the following if using a transportation company (e.g., bus company):
  - A contract/invoice has been signed by the transportation company representative, the chapter president and the vp: finance. The pick-up/drop-off times match the time of the event on the Anchorbase calendar.
  - You have obtained a Certificate of Liability Insurance (COLI) from the transportation company. \$1 million in general liability coverage is required. The COLI is expired.
- ☐ If you are traveling more than 1 mile from the campus of the chapter house and want to use Uber/Lyft/Other Rideshare Service, please contact your operations specialist to discuss.
  - Approval will be given on a case-by-case basis depending upon event details (chapter size, distance from chapter facility to venue, etc.). You will be required to use a check-in/check-out process for the event.
- ☐ If you are traveling less than one mile from campus or the chapter house, you may walk as a group. Complete the following if you are walking as a group:
  - Submit a written plan of the meeting place for all attendees, meeting time, and the route with your Anchorbase task.

### **Delta Gamma's [BYOB Procedures](#)**

Chapters may host BYOB events, where a licensed bartender, fully covered by his/her own liability insurance, is hired to serve alcohol to members 21 or older who brought their own alcohol of a specific type and quantity. The amount of alcohol and method for distribution shall be determined as the stricter of either the campus or Delta Gamma's policies and procedures. Please read the [full procedure](#) and contact your events and operations specialist with any questions. BYOB events go through the same approval process with the same requirements previously mentioned.

### **OBTAINING W-9S FROM VENDORS**

For each vendor that you work with, you should obtain a [W-9 Form](#). This does not need to be submitted with your Event Guideline submission, but rather should be given to your vp: finance, who should submit this form to Executive Offices staff by emailing it to [collegiate1099@deltagamma.org](mailto:collegiate1099@deltagamma.org).

### **IRS requirements for vendors:**

The IRS requires us to send a 1099 form to vendors that were paid directly by chapter cash or check for a total of \$600 or more during the calendar year (January–December).

For us to do this, the vendor must provide you with a completed and signed [W-9 Form](#). It must contain the vendor's business name, EIN or Social Security Number, tax classification, mailing address, and signature. The best time to request this form is when you first contact the vendor for a product or service. To assist you in obtaining a W-9, you may print the letter titled "[W-9 Request for Vendors](#)" and give this to your vendors when making the request.

**IMPORTANT:** You must have the completed W-9 before your vp: finance can pay the vendor.

The vp: finance should send the completed W-9 to Executive Offices staff by emailing it to [Collegiate1099@deltagamma.org](mailto:Collegiate1099@deltagamma.org). If you use this vendor regularly, you will need a new W-9 each year.

The following types of vendors are those most likely to need a 1099 and, therefore should give you a W-9:

- Caterers, food trucks, restaurants (dine-in)
- Rental services (tables, chairs, linens, lighting, party supplies, recruitment supplies, initiation supplies, etc.)
- Venues: parties, formals, retreats, Initiation, etc.
- Vendors of custom t-shirts, bid day bags, new member gifts, etc.
- Entertainment (DJs, bands, etc.)
- Bus/transportation companies
- Photographers, videographers, photo booths
- Event planners
- All vendors that supply labor: event setup, web design, carpet cleaning, house cleaning, repairs, etc.

**When in doubt, ask for a W-9.** How they fill out the form will indicate whether the payment needs to be reported to the IRS. If a vendor won't give you a W-9, contact and discuss this matter with your CFA, ATC, RFS or CFC. This vendor may not be operating within IRS guidelines.

## **Getting Your Event Approved:**

You will submit the requirements above via Anchorbase. Since your RCS has approved your calendar, the event with alcohol should already have a calendar entry for the correct date and time. A reminder task will populate on the Anchorbase dashboard under “Social Standards Tasks” two weeks prior to the required initial event submission date (three weeks prior to the date of the event).

Within the “Event Guidelines for Events with Alcohol” tasks, you must submit all documentation and required paperwork under the appropriate upload tabs and fill in all required responses. If you are having technical difficulties creating or uploading any files, contact your operations specialist.

Remember, the deadline for your initial submission is one week prior to the event, and your final deadline to have all paperwork and documentation in is two business days prior to the event. These deadlines ensure that you will have adequate time to get feedback via Anchorbase from your operations specialist and make any necessary corrections in order to hold the event. The operations team is here to help you along the way in planning your successful event with alcohol. It is always recommended to reach out early with any questions or issues that arise during the planning process.

- Feel free to email your operations specialist with any questions you may have or call 614-481-8169 during Executive Offices business hours (Monday through Friday, 9 a.m. - 5 p.m. ET).
- If your event is not approved, your operations specialist will discuss the next steps with you and potential options moving forward.

## PART III: EVENT GUIDELINE WAIVERS

Certain chapters, based on their environment or campus culture, may want to consider applying for some or all of Delta Gamma's Event Guideline Waivers. These waivers, if approved, allow adjusted procedures for the chapter's events with alcohol in regard to the venue, BYOB procedures or security requirements.

Summary and Intended Purposes of the Event Guideline Waivers:

### **Adjusted Venue Waiver**

- This waiver, if approved, would allow a social event with alcohol in the public areas of a men's fraternity facility, which is recognized by the Inter/National organization as an official chapter house and is insured by the Inter/National organization. This does not include annex houses and unofficial fraternity facilities.
- The event would still require a third-party vendor (i.e., a caterer or licensed bartender) to serve the alcohol unless the chapter was also approved for the BYOB Waiver.
- Chapters that should consider applying would be those that have limited third-party venues available due to location (rural area) or those where events at fraternity houses are a large part of campus culture.

### **Adjusted BYOB Procedures Waiver**

- Delta Gamma's current BYOB procedures require a licensed bartender; thus the waiver would replace the "licensed bartender" with a "TIPS® on Premise" certified server.
- This waiver, if approved, will allow BYOB events where the bartender would be a "TIPS® on Premise" certified server who is at least 25 years of age and not a member of Delta Gamma or a co-sponsoring organization at an approved venue.
- TIPS® stands for Training for Intervention Procedures. TIPS® training is accessible via the Internet and in the US and Canada. More information about obtaining TIPS® on Premise Training can be found [here](#).
- The event would still require a third-party venue (i.e., University space, event hall, etc.) to host the event unless the chapter was also approved for the Venue Waiver.
- Chapters that should consider applying would be chapters that host BYOB events and have limited access to licensed bartenders (states that don't license bartenders), or those who are applying for the Venue Waiver and the combination of the two waivers would closely mirror the campus culture.

### **Adjusted Security Waiver**

- This waiver, if approved, would allow events without security.
- Chapters that should consider applying would be chapters that struggle to find security due to limited availability based on their location (rural area), or chapters that struggle to find security that meets Delta Gamma's requirements.

## **SUBMITTING EVENT GUIDELINES FOR A WAIVERED EVENT**

When you are submitting an event guideline for a waived event, be sure that the event is listed on your Anchorbase calendar and choose the “Event Guidelines for Events with Alcohol (with waiver)” form when completing your event submission.

Each waiver you are approved for will change some of the requirements for your Event Guidelines submission, as follows:

If you are approved for the Adjusted BYOB Procedures Waiver:

- ☐ Instead of a licensed bartender as the beverage provider, the chapter must submit a contract signed by a TIPS-trained independent contractor, president and vp: finance.
- ☐ Must submit a copy of the server’s TIPS certification.
- ☐ Provide the TIPS server’s name and age.
- ☐ No liquor license is needed.

If you are approved for the Adjusted Venue Waiver:

- ☐ Venue contract/COI is not needed.
- ☐ You will need to provide address of the fraternity’s facility (must be an official house).

If you are approved for the Adjusted Security Waiver:

- ☐ Security contract/COI is not needed, and security is not needed at the event.
- ☐ If the chapter approved for reduced security instead of completely waiving a requirement, a contract/COI is needed reflecting the reduced amount for security guards.

## **GETTING APPROVED FOR EVENT GUIDELINE WAIVERS**

To apply for Event Guideline Waivers, you need to contact your operations specialist at Executive Offices. You will complete a separate application for each waiver and provide rationale for your chapter’s need for the waiver, as well as verify with your FSA that the waiver would not conflict with any University or Panhellenic policies. Once you submit your application, your operations specialist will work with your RCS/CAC/NCC, Regional Director (or Director: New Chapter Development if you are a new chapter) and collegiate development specialist to review the application. You will then be notified of the status of your waiver application(s). If you are holding an event that you would need a waiver for, we recommend that you begin the application process well in advance of your event. An approved waiver is in effect until the chapter is put on a status by the university or the Fraternity that precludes them from having events. You will need to have a touch base with your operations specialist prior to your first event with waivers each academic year to ensure you are knowledgeable on procedures and requirements.