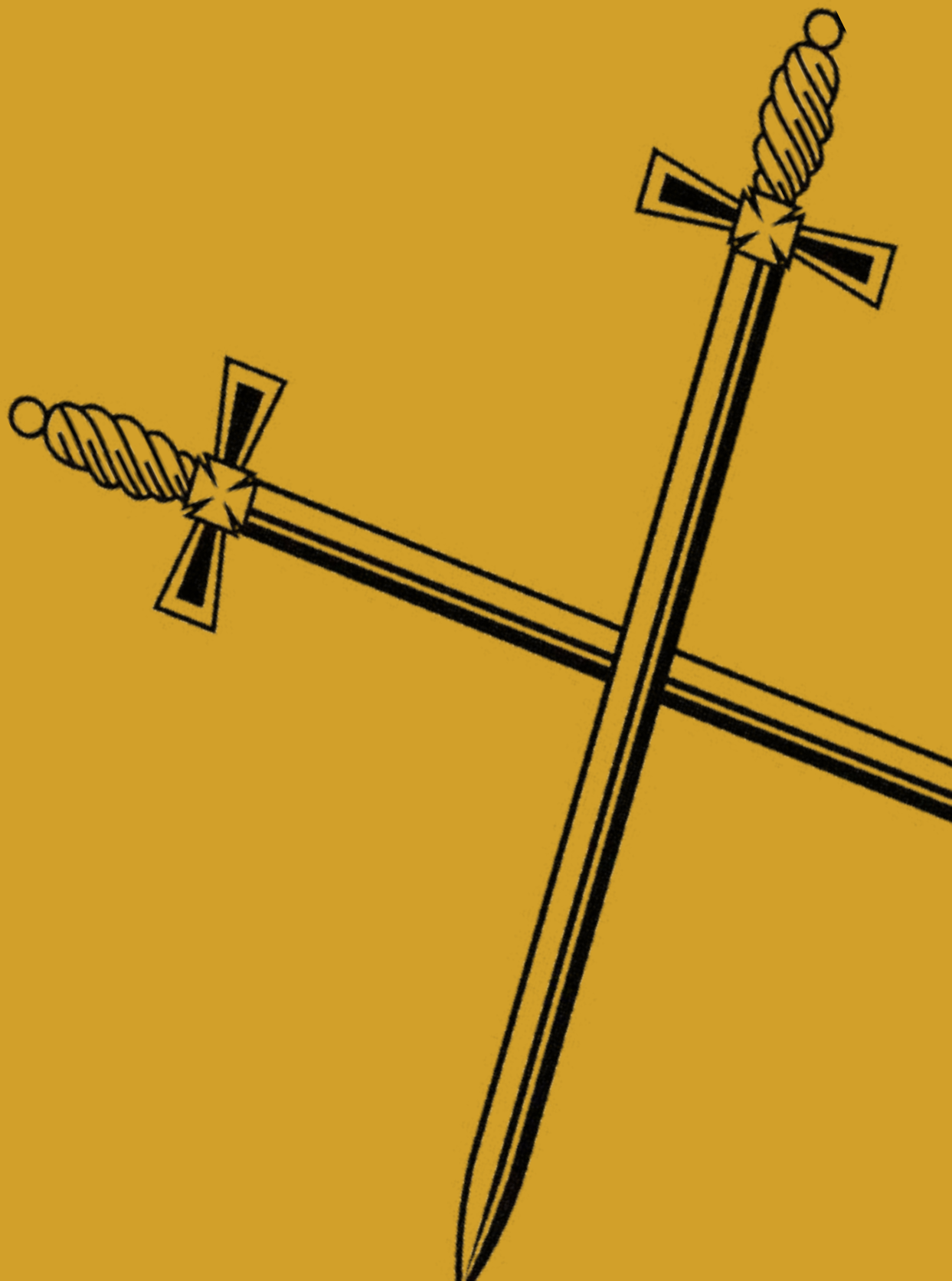
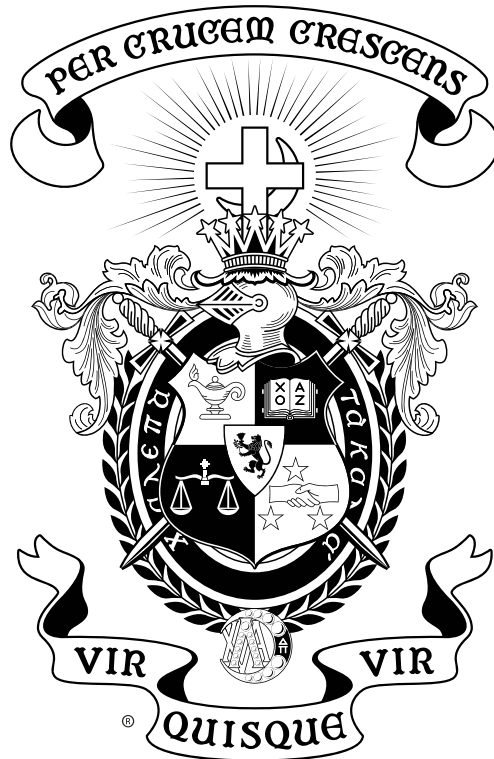


Event Planning Guide

✦ a Lambda Chi Alpha resource





*As a member of _____ Zeta,
I, _____, here by promise
to uphold the ideals of Lambda Chi Alpha
and
diligently perform the duties and
responsibilities
associated with this guide.*



Event Planning Guide

The Role of Event Planning

Brother, the safety of our members and guests and the success of our events is now your responsibility. Remember that it is through our actions, and through our events that we show our true values. Let them be aligned with the Seven Core Values and the principles commemorated in our Creed.

Note that it is important as you embark upon this journey of event planning that you remain ready to defy the status quo of Fraternity culture of parties, of alcohol, and of large scale events with expensive price tags. Demonstrate that you are a man among men in your prioritization of member and guest safety above over-the-top social events.

Aim to plan events which showcase the Fraternity and its impact on the community positively. Work collaboratively with all of the officers, and be conscious to utilize tomorrow's leaders in planning today's events.

In Order to Lead, You Must First **MODEL IT**

To MODEL IT means to implement the required functions of your office in order to lead the chapter effectively. These seven directives are the basic expectations for each brother during his term in office

- M**otivate: Members to seek a balanced chapter calendar. Complimenting social events with brotherhoods, philanthropies, recruitment events, and educational sessions.
- O**rganize: Events well in advance of deadlines so that harm may be predicted and reduced.
- D**elegate: Event planning tasks to chapter members, creating buy-in for events and reducing the stress of planning events alone.
- E**valuate: Evaluate event success by becoming familiar with the Event Planning Process and Lambda Chi Alpha event planning policies.
- L**ead: The chapter to host a safe and fun event for members and guests.
- I**nspire: Chapter members how to behave during events to reduce harm while still having fun.
- T**each: Chapter members how to behave during events to reduce harm while still having fun.

Event Planning Guide

A Message from the International Headquarters

Dear Member,

Welcome to the world of event planning. You are about to read through the Event Planning Guide for Lambda Chi Alpha International Fraternity. Within these pages, you will find a number of different resources and information on the Lambda Chi Alpha Event Planning Process, as well as a step-by-step breakdown of the Event Planning Form. Together, these two elements, and this Event Planning Guide, should be able to assist you in your endeavors to plan chapter events.

The Harm Reduction team understands that planning an event can be a tough job. As you read through this guide, you will see things that may be able to help you through the process. Some of the materials may not be what you need for the current event you are planning, however they do serve as a place to start learning about event planning in general.

Event planning is not something to be afraid of, although sometimes nerves can run high. Remain calm, and keep in mind the 6 P's of event planning: Prior Proper Planning Prevents Poor Performance. Simply put, if you have the time to plan the event, use every day that you have at your disposal! Waiting until the last minute only leads to greater frustration.

As you go forward, please know that all of the staff and volunteers that work with event planning are here to help answer your questions. Among the resources you will find in this guide are the following items: the steps of using Officer Portal for submitting Event Planning forms; how to successfully attain a certificate of insurance; and sample contracts that you can use to help better protect yourself in the case of an incident at your event. All of these resources can also be found online within the resource library of LCA One.

Finally, if you have any questions in regard to event planning or need assistance, please do not hesitate to contact us at eventplanning@lambdachi.org or at (317) 872-8000

Yours in ZAX,

The Harm Reduction Team

Event Planning Guide

Table of Contents

Topic	Jump to Section
1. Intro to Event Planning Forms	Jump to Section
2. Completing an Event Planning Form	Jump to Section
3. Event Basics	Jump to Section
4. Attendance	Jump to Section
5. Crisis Management	Jump to Section
6. Event Details	Jump to Section
7. Co-Sponsors	Jump to Section
8. Alcohol	Jump to Section
9. Contracts	Jump to Section
10. Certificate of Insurance	Jump to Section
11. Frequently Asked Questions	Jump to Section
12. Appendix: Contract Templates	Jump to Section
13. Facilities Agreement	Jump to Section
14. Security Services	Jump to Section
15. Bartending Services	Jump to Section
16. Third-Party Checklist	Jump to Section

Intro to Event Planning Forms

If you are planning to hold an event, most likely an Event Planning Form will need to be completed. Event Planning Forms are the means by which the International Headquarters assists chapters in ensuring that events are planned according to policy and with an attention to harm reduction. Commonly chapters have come to know Event Planning Forms as EPFs.

It's important to understand that Event Planning Forms involve both fraternal and insurance policy. This means that they may ask questions you are unfamiliar with the reasoning behind. This is not an attempt to trap or trick chapters into admitting misconduct – it is always to ensure the safety and appropriateness of events. As an example, you may wonder why the EPF asks about professional security or on-site emergency services. Professional security is necessary for any event that has more than three times the chapter membership in attendance. While emergency services are required for any event involving physical activity. Both requirements are outlined in Lambda Chi Alpha insurance policy, but not fraternal policy (as set forth through the Constitution and Statutory Code). To be clear, the exclusion from fraternal policy does not make compliance with these requirements any less mandatory. Non-compliance with insurance policy will leave the chapter without coverage.

Already, it has been said for any given event is it only “most likely [that] an Event Planning Form will need to be completed.” So how does a chapter know, if a form is or is not necessary? Simply, chapters are encouraged to submit EPFs for any event hosted by the chapter but are required to do so if one of the following seven conditions are met.

- During a similar/previous event, an accident or injury occurred.
- The event is co-sponsored with another fraternity or sorority.
- The event is planned at a site more than 10 miles from the chapter house or campus.
- The event is planned to exceed six hours in duration.
- Total attendance, including members, will exceed three times chapter membership.
- Contracts have been signed with a third-party vendor.
- A third-party has asked to be named as an additional insured on the Fraternity's insurance policy.

As a reminder, in Lambda Chi Alpha an event is defined by the reasonable observer standard. This means that if a reasonable person would say a gathering or function is a chapter event, it is a chapter event. This also means that there is no minimum number of people required to qualify an event. Always keep in mind the reasonable observer standard and the above seven requirements when determining if an EPF is expected.

With this basic understanding of Event Planning Forms you are ready to begin learning how to complete the Event Planning Process, starting with the submission of an EPF.

Completing an Event Planning Form

To access the Event Planning Forms complete the following steps.

1. Go to lcaone.org
2. Using your username and password, login to your profile.
3. On the left side of the page, select Officer Portal.
4. Once in Officer Portal, select the drop-down menu in the upper-right corner. Select Forms.
5. You should now see four tabs at the top of the page that read: "My Forms," "My Approval Needed," "My Pending Forms," and "Completed Forms." You should be currently looking at "My Forms."
6. Under the heading "Forms that May be Completed at Any Time" you should see "Event Planning Form."
7. Fill out the Event Planning Form completely. Make sure to answer each of the questions and fill in all open-ended questions with detailed responses.
8. Once you have completed the form, click "Save this Form and Submit."
9. Upon submission your form will be sent to your chapter's High Alpha where he can review the form and give it "First Level Approval." Upon approval by the High Alpha, the form will be sent to your chapter's High Pi to be reviewed and given "Second Level Approval."
10. After the second level approval, the Event Planning Form will be reviewed by a member of the Harm Reduction Team.

Helpful Hint

In order to meet the required deadlines it is recommended that you send a text, phone call, or email to the next person in the approval process, letting them know you have submitted an EPF. Submitting officers are encouraged to inform the chapter's High Alpha when a form needs approval. Similarly, High Alpha's are encouraged to inform the chapter's High Pi when a form needs approval.

Event Basics

This section of the Event Planning Guide will walk you through completing the 'Event Basics' portion of an Event Planning Form. This portion provides a general overview of the event being planned.

Event Name

The event name should be values congruent and not make any reference (overt or subtle) to drugs or alcohol. The event name cannot in any circumstance suggest a co-sponsorship with a bar, tavern, or night club.

Event Dates

Event Planning Forms can only be submitted for singular days. If an event lasts more than one day, an Event Planning Form must be filed for each day. The event date must be formatted MM/DD/YYYY.

Begin Time & End Time

Events should be limited in most cases to six hours or less. Events lasting longer than six hours must also provide ample non-salty snacks and non-alcoholic beverages, free-of-charge to all participants.

Helpful Hint

When filling in begin times and end times, note noon is equivalent to 12pm, where midnight is 12am.

Location

The event location should be noted the same way as a letter would be addressed. This includes both a location title and a street address (ex: Psi-Psi Zeta Chapter House: 111 University Dr., College Town, USA 12345). Later in 'Event Details' there will be additional information regarding the location of an event, particularly related to the distance a location is from campus.

Purpose of Event

All of Lambda Chi Alpha events fall into one of five categories (Brotherhood, Recruitment, Education, Philanthropy, Socialization). A well performing chapter has a balanced calendar that features a reasonable number of each type of event. If you have questions about what type of event your event would be categorized as, ask your Educational Leadership Consultant or call the International Headquarters at 317-872-8000.

Detailed Description of the Event

This is the greatest opportunity the chapter has to explain what is actually happening at the event. No detail should be left excluded. Remember to use easy to understand language, unique chapter terminology is hard to decipher through Event Planning Forms.

Helpful Hint

Include any games/activities, theme/decorations, food/drinks, how the guest list was determined, how transportation is being managed, how harm will be reduced, etc. If there is an agenda for the event with specific times, include that!

Continued

Event Basics

How many times has this event been held in the past?

Each time you host an event you learn something from it. Annual or repeat events may pose a lower level of risk. However, repeating an event too many times can also cause event planners to reduce their attention to potential harm and the level of risk may rise again.

Did any accidents occur at any of these previous events?

Be honest! If an accident occurred explain what happened and what will be done to prevent it from happening again.

Does the chapter have to register this event with the College/University?

On over 80% of campuses with Lambda Chi Alpha chapters this answer is yes. Check with your Interfraternity Council or Greek Advisor if you are not sure. Attach a screenshot of a registration confirmation screen or email as sufficient evidence.

Helpful Hint

For ANY event involving alcohol, some form of University acknowledgement is necessary, even if the event does not have to be registered. This can be as simple as an email from the Greek Advisor stating that you do not have to register the event.

Bonus Tip

A well prepared officer should be able to complete the 'Event Basics' portion of an Event Planning Form for all of his planned events by the start of the semester. This can be best accomplished through a High Zeta planning retreat. See the Lambda Chi Alpha Retreat Guide for additional information.

Attendance

This section of the Event Planning Guide will walk you through completing the 'Crowd Control' portion of an Event Planning Form. This portion answers the question, who will attend your event.

Planned Attendance

First, consider the purpose of the event. There is no point in inviting dates to a brotherhood function. Second, consider your location and your budget. For every event there is a per-participant cost. This may be as low as wristbands, or as high as seats on a bus. Additionally, every participant poses an inherent risk. The more people at an event the greater the chance that something could go wrong.

Helpful Hint

When planning a Lambda Chi Alpha event, make it a Lambda Chi Alpha event. Do not get caught up in inviting so many people that the members are stuck monitoring the event instead of enjoying it.

How will admission be controlled?

There are two options for controlling admission: Guest list and Open to the Public. It's important to note that both options still feature an event sign-in sheet that people sign as they enter the event. By maintaining a sign-in sheet the chapter is able to tell who actually attended an event. This is helpful in the unfortunate case that something goes wrong and you need to collect accounts of the event.

Guest List

Most Lambda Chi Alpha events will require a guest list. A guest list is a list of potential event participants, made intentionally, before the event. Made intentionally means the list is not just copy and pasted organization rosters, or a listing of people who might come.

Open to the Public

Only recruitment events and philanthropies are allowed to be Open to the Public. Events that have day-of-event ticket sales, or walk-up participation are considered open to the public. Open to the public events are NEVER allowed to involve alcohol. Remember, Open to the Public events are still expected to maintain an event sign-in sheet.

How many members will serve as sober monitors?

Determining the number of sober monitors needed at any given event is as easy as dividing the total number of event participants (including members) by 10. For events with lower level risk the chapter is permitted to decrease the number of sober monitors to a 1:15 ratio. When listing sober monitor names in the Event Planning Form make sure to use full names and separate them using commas.

Helpful Hint

Being a sober monitor means being trained on the Lambda Chi Alpha Crisis Management Plan and knowing the basics of how to appropriately confront a potential issue. Being a sober monitor is a very serious responsibility.

Continued

Attendance

Will professional security guards be hired for this event?

Professional security is required for events that total attendance exceeds three times the chapter members, which are in attendance at the event. Another way to think about this is that if the event features a members to non-members ratio higher than 2:1 then security is required. One security guard is required for every 50 event participants, rounded up. Security can often be hired through police departments, with off-duty police officers, or through private security companies. **IMPORTANT NOTE:** event security cannot carry any form of firearm during a Lambda Chi Alpha sponsored event, unless required to do so by law (see Mandatory Resolution Regarding Firearms, Explosives, and Incendiary Devices).

Bonus Tip

Open to the public events are not exempted from the security-attendance policy. This is another great reason to utilize sign-in sheets. Sign-in sheets can help you keep track of how many people are at your event. Once the 2:1 ratio has been reached the event should be closed until people leave or more members arrive.

Crisis Management

This section of the Event Planning Guide will walk you through completing the 'Emergency Procedures' portion of an Event Planning Form. This portion assesses the chapter's ability to predict and prevent harm, as well as the ability to respond in the case of an emergency.

Have all officers and members reviewed the Lambda Chi Alpha Crisis Management Plan?

In order to be eligible to host ANY event, the chapter must first review the Lambda Chi Alpha Crisis Management Plan. The Lambda Chi Alpha Crisis Management Plan educates and prepares a chapter for the proper response to emergency situations.

Will Emergency Services be on site?

Emergency Services consist of professionally trained first responders and emergency medical technicians. Chapter members trained in CPR do NOT constitute emergency medical services.

Will this event involve any physical activity?

More than likely your event involves physical activity. Any event that involves moving, bending, twisting, running, jumping, skating, etc. is physical in nature. Events with physical activity require participant waivers and emergency services to be present. A template waiver is available in the LCA One Resource Library.

Helpful Hint

Just because an event or a venue has participation waivers does not mean that the chapter does not need them. In fact, it means just the opposite! If participants are signing a waiver for someone else, they should probably be signing one for Lambda Chi Alpha as well!

Responsible Chapter Member

Name one person to be the lead of the sober monitors and the Crisis Management Plan during the event. As a best practice this should be a chapter officer who is familiar with the event plan. While completing the Event Planning Form make sure to use their full name and provide their contact information.

Event Details

This section of the Event Planning Guide will walk you through completing the 'Event Details' portion of an Event Planning Form. This portion further clarifies the responses within 'Event Basics.'

Will there be any special construction decorations for this event?

Special construction for an event may include things such as streamers, balloons, banners, platforms/risers, stages, or the modification of spaces such as the removal or addition of furniture to a space. As an example, if you are hosting a tailgate mention in this space if the chapter is providing a tent, tables, chairs, etc.

Person performing the construction

If the construction is extensive the International Headquarters may want to contact the person performing it. If the construction is being done by a group of people, designate one person as the leader of the project and list their full name and contact information.

How far is the event site from campus?

Lambda Chi Alpha has several overlapping policies regarding the distance an event is from campus. Events taking place 10-120 miles from campus require a set list of drivers included in the EPF. Additionally, events 50-120 miles from campus require driver contracts (available in the LCA One Resource Library). Lastly, remember any events further than 120 miles from campus require professional transportation.

List Drivers

Driver names must be provided for any event taking place 10-120 miles from campus. Only full names, offset by commas, will be accepted.

If the event is more than 10 miles away, how will members and guests travel to the event?

Select one of the dropdown options. Remember, it is advised that members travel both to and from the event utilizing the same means of transportation. If buses take members to the event, it is expected that buses take members from the event.

What will be the duration of the event?

Any event lasting longer than 6 hours must also provide ample food (non-salty snacks) and non-alcohol beverages. These events must also provide rationale for their length.

Helpful Hint

The Lambda Chi Alpha Initiation Ritual is expected to be completed in 6 hours or less. Even Lambda Chi Alpha's largest chapters are held to this standard. For assistance in shortening the ritual exemplification email programming@lambdachi.org.

Continued

Event Details

Will ample food (non-salty snacks) and non-alcoholic beverages be available?

Ample food (non-salty snacks) and non-alcoholic beverages are required for any event lasting longer than 6 hours or involving alcohol. Snacks and beverages must be available without purchase. Consider this requirement, and its associated costs, when planning long events. This includes any form of philanthropic marathon (thon) events.

Who will provide the food?

Note that food preparation/handling/serving is subject to inherent risk. Chapters who choose to prepare their own food or host potluck-style events are first encouraged to consult with a local food safety professional. It is due to this engrained risk factor that the food provider's contact information is requested. If the event is utilizing a professional catering service or takes place at a restaurant the contact information for the company is requested.

Co-Sponsors

This section of the Event Planning Guide will walk you through completing the 'Co-Sponsors' portion of an Event Planning Form. This portion defines the relationship between co-sponsoring organizations and assures the International Headquarters that an appropriate level of shared-planning has occurred.

Will another fraternity or sorority cosponsor this event?

Be clear whenever working with other organizations as to who is hosting and planning the event. When other groups are involved in planning or hosting it is important to share the responsibility and liability for the event by acknowledging the co-sponsorship.

Will there be alcohol at the event?

Events with alcohol, whether co-sponsored or not, pose an additional level of risk. By selecting 'yes' to this question an additional series of questions related to alcohol monitoring will be made available. It is appropriate to answer 'yes' to this question anytime alcohol is available during an event. This includes through BYOB and third-party vendors.

Does the other organization have permission to conduct this event if approval is required?

A majority of Inter/national Greek organizations have Event Planning Processes similar Lambda Chi Alpha's. Make sure the co-sponsoring organization has appropriately completed their Event Planning Process. Attach any evidence of process completion to the Event Planning Form. Remember, co-sponsoring event participants also pose a risk, and any way of ensuring that that risk has been reduced is beneficial to the success of the event.

Have officers from both organizations met to establish event plans?

If your answer to this question is no, the event is likely not co-sponsored. Another good way of telling if an event is co-sponsored is by examining financial commitment. If both organizations have not shared the financial commitment of an event, the event is likely not co-sponsored.

Do both organizations appear on all contracts?

The risk posed by co-sponsoring event participants is directly related, as an exposure, to liability coverage often outlined in contracts. Share the burden of that risk by ensuring all co-sponsoring organizations also sign contracts. As always, send contracts to the International Headquarter for review prior to signing them.

Does this organization have insurance?

If a co-sponsoring organization does have insurance it may be necessary, based on the scale of the event, to request a certificate of insurance. A certificate of insurance acts as proof of insurance. On rare occasions the International Headquarters may request that the chapter be named as an additional insured on a co-sponsoring organization's certificate of insurance. In these cases, a member of the Harm Reduction Team will contact the submitting officer of the Event Planning Form.

Continued

Co-Sponsors

Will the alcohol policies of all organizations be followed?

In the event that the organizations' alcohol policies differ, the stricter of the two policies must be followed. In no case should a chapter of Lambda Chi Alpha encourage or permit another organization to violate any of their policies. To do this shared-planning should occur prior to the date of the event.



This section of the Event Planning Guide will walk you through completing the 'Alcohol Monitoring' portion of an Event Planning Form. This portion addresses harm reduction tactics and policy congruence related to events involving alcohol.

Is written permission required by the university/college for alcohol use at the event?

If the answer is yes, make sure that the appropriate form of university documentation was attached at the beginning of the Event Planning Form. If the answer is no, attach evidence of university acknowledgment stating the event does not need to be registered. This latter attachment can include an email screenshot.

Have you read and do you understand the policies of Lambda Chi Alpha?

The submitting officer must first read and understand the policies of Lambda Chi Alpha before attempting to submit an Event Planning Form for any event involving alcohol. Answering 'no' will result in the form being marked pending or denied until the policies have been reviewed.

Does the use of alcohol at this event comply with these policies?

Failure to comply with Lambda Chi Alpha policy results in loss of insurance coverage and potential disciplinary action. Questions regarding policy congruence should be directed to harmreduction@lambdachi.org.

When will alcohol be permitted?

Lambda Chi Alpha does not permit any pre-game or after-party events. Remember, alcohol distribution must be at a controlled rate and must end 1 hour before the end of the event.

How is alcohol provided during this event?

Alcohol may be provided during Lambda Chi Alpha events in one of two methods: BYOB or third-party vendor. No open sources of alcohol are permitted.

Who will serve alcohol?

Select one of the dropdown options. Remember, no open access to alcohol is permitted.

What types of alcohol will be present?

Select all types of alcohol that apply. BYOB events may only involve Beer or Wine Coolers. Wine and Liquor are not permitted at any Lambda Chi Alpha function, unless served by a third-party vendor.

What charge, if any, will be made for alcoholic beverages?

Select one of the dropdown options. Here there are several policies.

- Admission cannot be charged for events involving alcohol. This includes ticket sales and door "cover" charges.
- Chapter Funds may not be used for alcohol. This includes paying for drink tokens

Continued

or paying to reduce/subsidize the cost of drinks.

- Donations and Contributions are seen similarly to a “slush-fund” and are thereby prohibited. “Pass the hat” and soliciting funds from members are all included in this policy.
- Not charging for alcohol constitutes open access when through a third-party and is also not permitted.

The only accepted response for third-party vendor events is “charge by drink” while the only accepted response for BYOB events is “no charge.”

Describe in detail the check-in process for alcohol and what method will be used to limit consumption:

Alcohol check-in and distribution methods represent the greatest opportunity for harm reduction during events with alcohol. Alcohol check-in methods relate most clearly to BYOB events. While alcohol distribution methods relate to both BYOB and third-party vendor events.

Alcohol check-in should be done by sober chapter members of legal drinking age or alumni. Check-in should consist of ensuring only an appropriate amount of alcohol is being brought in and placing the alcohol in a monitored space. Alcohol should be labeled with the name of who brought it.

There are several authorized methods of alcohol distribution. The key feature of a good distribution method is that it regulates both the amount and rate at which alcohol is consumed. Some examples include: punch cards, tabbed wristbands, and tickets. For specific information on any of these, or other, distribution methods please contact harmreduction@lambdachi.org.

Will ample non-alcoholic beverage be provided without charge?

Events involving alcohol are required to provide ample non-alcoholic beverages without charge. Answering ‘no’ will result in the form being marked pending or denied until non-alcoholic beverage arrangements have been made.

What time will you begin serving alcohol?

Enter a time, include AM/PM. Note that the time must be at or after the event start time, as listed earlier in the EPF.

What time will you stop serving alcohol?

Enter a time, include AM/PM. Note that the time must be at least one hour prior to the event end time, as listed earlier in the EPF.

Continued

How will the verification of legal drinking age be accomplished?

First determine whether drinking age will be verified at the bar or at the entrance of the event. If at the entrance, determine who will be responsible for that verification – chapter members or the security guard. If the event has a security guard it is a best practice to use them, rather than a chapter member.

How will those persons of legal drinking age be identified?

If legal drinking age is being verified at the bar then “ID Checked Each Time” is the most appropriate response. However, if legal drinking age is being verified at the entrance of the event, then it will be necessary for drinking age to be identified for the bar. The best practice is to use non-removable wristbands for members/guests of legal drinking age and non-transferrable handstamps for members/guests under the legal drinking age. By identifying both, of-age and under-age participants, the chance of someone being improperly served is cut in half – a participant would have to try twice as hard to circumvent the harm reduction tactics.

What procedures will be taken if minors are observed drinking?

This response should include removal from the event as well as an explanation of post-event accountability, such as a meeting with the Executive Committee.

Will public transportation be provided for individuals that have consumed alcohol?

It is recommended that any event that involves alcohol also plan for the transportation of those participants who have consumed. This approach recognizes Lambda Chi Alpha's continued responsibility for the safety of our members and guests, after an event ends.

Will members and guests be required to check their automobile keys at the door?

If yes, explain how the chapter will determine if members and guests are ready to drive following the event. Do not attempt to act as police officers or overestimate your abilities. Always side with caution when determining if someone is ready to drive.

Bonus Tip

Utilize the third-party vendor contract template and the third-party vendor checklist to expedite planning events with alcohol. Hosting events with third-party vendors brings professionals, who know how to safely serve alcohol, into the Event Planning Process and helps reduce harm!

Contracts

This section of the Event Planning Guide will walk you through completing the 'Contracts' portion of an Event Planning Form. This portion addresses how to establish a safe and mutually-agreeable legal relationship with a company or service provider.

What types of property will be rented or borrowed from the contracting group?

Select the option that best represents the agreement between the chapter and the contracting group.

Please check all vendors that will be used for this event:

Only select vendors that will have contracts. Vendors without contracts do not need to be indicated. Additional vendors may be listed under "other."

Please attach all applicable contracts:

Attach all contracts, certificates of insurance, and checklists. Note, all contracts MUST identify the chapter as "[blank]-[blank] Zeta of Lambda Chi Alpha." Contracts should NEVER identify chapters simply as "Lambda Chi Alpha." Additionally, if either a licensed cash bar or bartenders will be used, the third-party vendor checklist must be submitted. The checklist is available through the LCA One Resource Library and through the appendix of this guide.

Helpful Hint

Use the contract templates available in the appendix of this guide to help ensure your EPF will be approved. Contract templates are available for renting a facility, hiring security, and hiring bartenders.

Bonus Tip

Always remember **the number one rule about contracts:** CONTRACTS MUST BE SUBMITTED TO THE INTERNATIONAL HEADQUARTERS PRIOR TO BEING SIGNED BY THE CHAPTER. Contracts should be submitted at least 30 days before event date or signing deadline, whichever is sooner. If a company requests that you sign a contract by September 1st for an event on September 15th. The contracts should be sent to the International Headquarters by August 1st, not August 15th. Submitting contracts late may result in Event Planning Form denial.

Certificates of Insurance

While this section of the Event Planning Guide does not relate directly to a portion of the Event Planning Form, vendors or Universities may from time to time request a copy of Lambda Chi Alpha's Certificate of Insurance. Additionally, for any event where the chapter will sign a contract with a vendor, the chapter must provide a copy of the vendor's Certificate of Insurance, naming the chapter, House Corporation, and the General Fraternity as additional insureds, with the EPF. This section of the Event Planning Guide will walk you through how to request a Certificate of Insurance (commonly called a COI) from a vendor, and how to request a copy of Lambda Chi Alpha's COI. Lastly, this section will also discuss additional insured requests.

Certificate of Insurance

A certificate of insurance is a sheet of paper that outlines the types of liability coverage that an insured (policy holder) maintains. The limits of coverage (the most the policy will pay for a claim) are also stated.

Requesting a COI from Vendors

Most reputable vendors will be readily aware of how to process a COI request. Remember to be clear that the COI must name the chapter "[Blank]-[Blank] Zeta of Lambda Chi Alpha," the chapter's House Corporation (if applicable), and "Lambda Chi Alpha Fraternity" as three separate additional insureds with primary coverage.

Important Note

Many insurance companies charge to list entities as additional insureds. Expect that the vendor will pass this cost along to you. Ask while planning the event, if there will be an additional cost for your COI with additional insured requests. Remember COIs with additional insureds are required for any contracted vendor.

Requesting a COI from Lambda Chi Alpha

If your chapter is in need of a copy of a Certificate of Insurance, please make your request by emailing harmreduction@lambdachi.org. In the request, please include:

- o The name, organization name, physical address, email address, and phone number of the person requesting the certificate.
- o All supporting documents that indicate the reason or written request showing why the certificate is being requested.

Adding Additional Insureds

Any requests to add third parties, such as universities and colleges, landlords, or special event sponsors to the Lambda Chi Alpha group liability insurance policy as Additional Insureds must be made in writing and be accompanied with appropriate documentation. These requests take approximately two weeks to process, so please plan requests accordingly.

The Fraternity's insurance company charges a \$250 fee to add a third party as an additional insured under the policy. If your request comes in less than 14 days prior to your event there is an additional \$250 rush charge. If the third party is requesting to be added with primary coverage it is a \$500 base

A Message on Certificates of Insurance from James R. Favor & Company

"Providing a Certificate of your Insurance to another party may be the last chance you will have to apply Risk Management techniques to a given exposure or potential loss situation. To provide Risk Management Services, our staff and your legal advisors need complete information, documentation and adequate lead-time. Your cooperation in following the procedures outlined below will enable our staff and your legal advisors to provide you with effective, and prompt Risk Management Services in response to your Certificate of Insurance Request.

1) Written requests from the party requesting a certificate of your insurance will speed Risk Management evaluation, response, and minimize errors by providing details of the requirements and communications information.

2) To accurately issue certificates of insurance the following information is needed: Fraternity or Sorority Name, Chapter Name, School, Mailing Address, The Parties Concerned, Insurable Interests, The Reason for Providing a Certificate, Contact Information, Date required, and Cancellation Requirements. For lenders the Customer or Loan Number and Required Property Values may be necessary.

3) Requests and supporting documentation should be received in our office 30 days before the certificate is needed. This permits the time needed for gathering added information, review by your legal counsel or the insurance company, and accomplishing adjustments as necessary.

4) Review all contracts with your legal counsel before execution. We do not offer legal advice or draft contractual agreements. We will be pleased to assist your legal counsel in reviewing the risk management considerations of contracts.

5) Functions, Special Events and any Additional Insureds deserve special attention in order to review and attempt to minimize your exposures. Certificate requests for these types of activities should include a complete event planning form including all the appropriate attachments.

6) Risk Management Services and Certificates of Insurance are provided at no charge. Extra charges may apply for Additional Insureds, and for any extra expenses incurred for priority handling.

7) Certificates of Insurance will provide the policy numbers, underwriters, policy period, coverages, limits and deductibles."

Continued

A Message on Certificates of Insurance from James R. Favor & Company

So, how does this apply to you?

Dealing with insurance and vendors can be difficult. So, when you are planning an event, always try to keep in mind some keys points:

- If you are in need of a contract, make sure you place "[Blank]-[Blank] Zeta of Lambda Chi Alpha" for the name.
- If you need a certificate of insurance or are requesting an additional insured, email harmreduction@lambdachi.org
- All Event Planning Forms need to be in at least 15 days prior to the start of the event. 30 days if you have a contract
- If the company you are working with requires an Additional Insured, remember that it will cost the chapter \$250 (\$500 for primary coverage).

Continued

Frequently asked Questions

When do I need to submit an Event Planning Form?

Event Planning Forms need to be submitted when your event meets one of the seven guidelines listed on the form.

Why do I need to submit an EPF?

It is our goal to help educate our members on how to properly plan events and to ensure the policies of Lambda Chi Alpha, FIPG, and our insurance company are met. By submitting a form the Harm Reduction Team assists you in identifying any issues with your event and offers to help your event comply with Lambda Chi Alpha policy.

How far ahead of time do I need to submit my EPF?

All forms without contracts are due a minimum of 15 days prior to the event. Any event that utilizes contracts are due 30 days prior. This provides our staff adequate time to review the forms and return feedback on the event before it occurs.

My event has no alcohol; do I still need sober monitors?

Yes! Sober monitors are needed at all of your events because they are there specifically to assist in a time of an emergency. Even if your event doesn't have alcohol, you still need one sober monitor for every 10-15 total anticipated people at your event. All events must have a minimum of five sober monitors.

Do I always need a guest list?

Any social event you have should have a pre-determined guest list to ensure you know how many and who is attending your event. Philanthropy and recruitment events do not need a pre-determined guest list, however they must still have an event sign-in sheet. All events require an estimated attendance.

Who should be a sober monitor?

Both collegiate brothers and associate members should be considered to help serve as sober monitors. Big brother and little brother pairs are an excellent way to teach younger members how to be an effective sober monitor. Associate members should NOT be the only members that are sober monitors.

Other organizations don't have to submit event planning paperwork, why do we?

We have event planning paperwork to ensure that your chapter adheres to Lambda Chi Alpha policies, while helping to keep your events as safe as possible. Additionally, if there are any additional insurance requirements outlined in contracts that you may be signing, our team will help you identify those and will help you make responsible choices selecting third-party vendors.

What types of events aren't allowed?

Most events involving water are not covered by our insurance company (i.e. pools, oceans, lakes, rivers). Additionally, due to the number of accidents that have occurred; slip n' slides, tug-of-war, and eating contests are no longer covered events. If you have an idea for an event and you are not sure, ask!

Continued

Frequently Asked Questions

If I have a multi-day event do I have to submit more than one Event Planning Form?

Yes! Although, it may be one consistent event, each day needs a separate form.

Its past that 15 or 30 day time limit, should I still submit a form?

Yes, although we cannot guarantee that the form will be reviewed. It is better to submit a form and have your event details organized. If you are less than 15 or 30 days prior to the start of your event, you can fill out the form and keep it for your records at the chapter.

I am signing contracts, should I just put 'Lambda Chi Alpha'?

No. When signing a contract be sure to put your Zeta designation on the form. For example, if your zeta is "Psi-Psi Zeta," all contracts should be in the name of "Psi-Psi Zeta of Lambda Chi Alpha." This ensure that you are only including your particular chapter on the contract.

I have been asked to additionally insure someone, what does that mean?

If a company or a person wants to be additionally insured that means that they are asking to be named on and covered by Lambda Chi Alpha's insurance policy. Because the chapter is buying insurance it needs to go through our insurance company. That means that you are buying insurance for your chapter. This is not a free service however, every additional insured person is \$250. If you submit the request less than 14 days, then there is an additional \$250 rush charge. If you need extra coverage, get the form in early.

I submitted my form, but I have not heard anything back yet?

Many chapters deal with this issue. Most likely you have submitted your form but it is waiting on first or second level approval. To get an Event Planning Form to the International Headquarters there is a three-step process.

1. The submitting officer needs to submit the form on Officer Portal.
2. Once he submits the form, the High Alpha needs to log in and approve the form.
3. Once he approves it, the High Pi must also log in and approve the form.

Once the High Pi approves the form, then it comes to the International Headquarters. Be sure to notify you High Alpha and High Pi after submitting forms! The 15 day deadline starts once your High Pi approves the form.

My form came back to me as "pending", what do I do?

Event Planning Forms marked as pending, or denied pending, are available for the submitting officer's revisions. Read the comments from the member of the Harm Reduction Team for direction on what needs to be revised. Once the revisions are made, resubmit the form for first and second level approval. After second level approval your form will be returned to the International Headquarters for another round of reviewing. Revised forms may be submitted within the 15 or 30 day limits.

I have a question about the Event Planning Process, who do I contact?

Email harmreduction@lambdachi.org, and a member of the Harm Reduction Team will answer your question as soon as possible.

Facilities Agreement

AGREEMENT made this _____ day of _____, 20____ between _____ Zeta of Lambda Chi Alpha Fraternity, a non-profit association ("Chapter"), and) _____ ("Contractor").

1. **Facilities.** Contractor hereby rents to Chapter the _____ ("Facilities") for a Chapter function on the following terms:

- a. Date: _____
- b. Hours: _____
- c. Rate or Fee: _____
- d. Payment terms: _____

2. **Services.** Contractor hereby agrees to provide to Chapter the following services at the function described above:

- a. Food Service
 - i. Description: _____
 - _____
 - _____
 - ii. Rate or Fee: _____
 - iii. Payment terms: _____
- b. Bar Service
 - i. Description: _____
 - _____
 - _____

NOTE: Bar Service to end one hour before scheduled end of function as described above

- ii. Rate or Fee: _____
 - iii. Payment terms: _____
- c. Security Service
 - i. Description: _____
 - _____
 - _____
 - ii. Rate or Fee: _____
 - iii. Payment terms: _____
- d. Other
 - i. Description: _____
 - _____
 - _____
 - ii. Rate or Fee: _____
 - iii. Payment terms: _____

Facilities Agreement

3. Further Agreements.

- a. Contractor warrants and represents that all personnel provided by Contractor:
 - i. have received training appropriate to chapter function.
 - ii. are familiar with all state, local, university, and Lambda Chi Alpha Fraternity laws, regulations, policies guidelines ("Rules") applicable to the chapter function.
 - iii. will perform their duties in accordance with the Rules,
 - iv. will not consume or use illegal substances or alcoholic beverages while performing their duties, and
 - v. will not possess firearms, unless required to do so by law, while performing their duties.
- b. Nothing contained in this Agreement or otherwise shall be construed to constitute Contractor as an employee or agent of Chapter. It is being intended that Contractor is an independent contractor solely responsible for the actions of Contractor and Contractor's employees and agent.
- c. Contractor shall indemnify and hold harmless Chapter, house corporation, Lambda Chi Alpha Fraternity and their members, officers, and agents from liability for any claim arising out of injuries or damages caused by an act or omission of the Contractor or Contractor's employees or agents. Contractor represents and warrants that it carries liability insurance covering such indemnity obligation and agrees to provide a certificate of insurance at least naming the Chapter, house corporation, and Lambda Chi Alpha Fraternity, Incorporated as additional insured ("additional insureds"). Contractor's insurance shall provide that, with respect to any other insurance coverage which may be available to any additional insureds, Contractor's coverage shall be primary and not contributory or excess.
- d. This agreement contains the entire agreement between the parties, and no amendments, changes, additions, or qualifications may be made or will be binding unless made in writing, and signed by both parties.

IN WITNESS WHEREOF, Chapter and Contractor have signed this Agreement to be effective as of the date set forth above.

_____ (Contractor)

_____ Zeta of Lambda Chi Alpha

By: _____

By: _____

Title: _____

Title: _____

Security Services

AGREEMENT made this _____ day of _____, 20____ between _____ Zeta of Lambda Chi Alpha Fraternity, a non-profit association ("Chapter"), and _____ ("Contractor").

1. DUTIES

- a. Contractor is hereby engaged by Chapter to provide the following security services during the Chapter function described on Exhibit A to this Agreement:
 - i. Check identification of Chapter members and guests;
 - ii. Ensure that only persons of legal drinking age are allowed to purchase and consume alcoholic beverages;
 - iii. Take reasonable steps to maintain crowd control, prevent disorderly or offensive conduct, and enforce the Rules (as defined below); and
 - iv. Take reasonable steps to prevent substance abuse by members and guests including:
 1. Preventing an obviously intoxicated individual from purchasing or consuming alcoholic beverages; and
 2. Peacefully and without the use of force removing disruptive and/or intoxicated individuals from the immediate premises.
- b. Contractor warrants and represents that all personnel provided by Contractor are:
 - i. Trained in security procedures appropriate to Chapter function;
 - ii. Familiar with all state, local, university, and Lambda Chi Alpha Fraternity laws, regulations, policies, and guidelines ("Rules") applicable to the Chapter function;
 - iii. Will perform their duties in accordance with the Rules;
 - iv. Will not consume or use illegal substances or alcoholic beverages while performing their duties; and
 - v. Will not possess firearms, unless required to do so by law, while performing their duties.
- c. Nothing contained in this Agreement or otherwise shall be construed to constitute Contractor as an employee or agent of Chapter, it being intended that Contractor is an independent contractor solely responsible for the actions of Contractor and Contractor's employees and agent.

2. COMPENSATION

- a. Contractor will be paid upon a per-job basis in accordance with Exhibit A and will be solely responsible for paying Contractor's employees and agent.

3. INDEMNIFICATION/INSURANCE

- a. Contractor shall indemnify and hold harmless Chapter, house corporation, Lambda Chi Alpha Fraternity and their members, officers, and agents from liability for any claim arising out of injuries or damages caused by an act or omission of the Contractor or Contractor's employees or agents.
- b. Contractor shall be required to carry liability insurance covering such indemnity obligation and agrees to provide a certificate of insurance at least naming the Chapter, house corporation, and Lambda Chi Alpha Fraternity as additional insureds ("additional insureds").
- c. Contractor's insurance shall provide that, with respect to any insurance coverage which may be available to any additional insureds, Contractor's coverage shall be primary and not contributory or excess.

Security Services

4. MISCELLANEOUS

- a. This agreement (including Exhibit) contains the entire agreement between the parties, and no amendments, changes, additions, or qualifications may be made or will be binding unless made in writing signed by both parties.

IN WITNESS WHEREOF, Chapter and Contractor have signed this Agreement to be effective as of the date set forth above.

_____ (Contractor)

_____ Zeta of Lambda Chi Alpha

By: _____

By: _____

Title: _____

Title: _____

Security Services: Exhibit A

1. CHAPTER FUNCTION:

- a. Date of function: _____
- b. Place of function: _____
- c. Hours of service: _____
- d. Description of service: _____

2. COMPENSATION

- a. Number of security officers present at function: _____
- b. Hourly rate or other fee: _____
- c. Payment terms: _____

Bartending Services - Independent Contractor Agreement

AGREEMENT made this _____ day of _____, 20____ between _____ Zeta of Lambda Chi Alpha Fraternity, a non-profit association ("Chapter"), and _____ ("Contractor").

1. DUTIES

- a. Contractor is hereby engaged by Chapter to provide the following bartending services during the Chapter function described on Exhibit A to this agreement:
 - i. Following measures to ensure that only persons of legal drinking age are served alcoholic beverages;
 - ii. Exercise discretion in serving alcoholic beverages to Chapter members and guests and refuse to serve alcoholic beverages to any Chapter member or guest if the Contractor believes that such Chapter member or guest is acting in a manner that could be detrimental to either the member or guest, Chapter or other persons; and
 - iii. Comply with the Rules (as defined below).
- b. Contractor warrants and represents that all bartenders provided by Contractor:
 - i. Are TIPS certified;
 - ii. Are familiar with all state, local, university, and Lambda Chi Alpha Fraternity laws, regulations, policies, and guidelines (including any campus "BYOB" policy) applicable to the serving of alcohol at the Chapter function (the "Rules");
 - iii. Will perform their duties in accordance with the Rules; and
 - iv. Will not consume or use illegal substances or alcoholic beverages while performing their duties.
- c. Nothing contained in this Agreement or otherwise shall be construed to constitute Contractor as an employee or agent of Chapter, it being intended that Contractor is an independent contractor solely responsible for the actions of Contractor and Contractor's employees and agent.

2. COMPENSATION

- a. Contractor will be paid upon a per-job basis and will be solely responsible for paying Contractor's employees and agents.

3. INDEMNIFICATION/INSURANCE

- a. Contractor shall indemnify and hold harmless Chapter, house corporation, Lambda Chi Alpha Fraternity, and their members, officers, and agents from liability for any claim arising out of injuries or damages caused by an act or omission of the Contractor or Contractor's employees or agents.
- b. Contractor shall be required to carry liability insurance covering such indemnity obligation and agrees to provide a certificate of insurance naming at least the Chapter, house corporation, and Lambda Chi Alpha Fraternity as additional insureds ("additional insureds").
- c. Contractor's insurance shall provide that, with respect to any other insurance coverage which may be available to any additional insureds, Contractor's coverage shall be primary and not contributory or excess.

Bartending Services - Independent Contractor Agreement

4. MISCELLANEOUS

- a. This Agreement (including Exhibit) contains the entire agreement between the parties, and no amendments, changes, additions, or qualifications may be made or will be binding unless made in writing, signed by both parties.

IN WITNESS WHEREOF, Chapter and Contractor have signed this Agreement to be effective as of the date set forth above.

_____ (Contractor)

_____ Zeta of Lambda Chi Alpha

By: _____

By: _____

Title: _____

Title: _____

Bartending Services: Exhibit A

1. CHAPTER FUNCTION:

- a. Date of function: _____
- b. Place of function: _____
- c. Hours of service: _____
- d. Description of service: _____

2. COMPENSATION

- a. Number of bartenders present at function: _____
- b. Hourly rate or other fee: _____
- c. Payment terms: _____

Third-Party Vendor Checklist

If the chapter is planning to hire a "Third-party vendor" to serve alcohol at the event, the following checklist items **MUST** be implemented in order to adhere to the policies of Lambda Chi Alpha.

College/University: _____ Date of Event: _____

The Vendor **MUST** agree to:

- **Be properly licensed by the appropriate local and state authority.**
 - This might involve both a liquor license and a temporary license to sell on the premise where the function is being held.
 - Attach copies of state and local licenses to the Event Planning Form.
- **Be properly insured with a minimum of \$1,000,000 of GENERAL and LIQUOR LEGAL LIABILITY INSURANCE, evidence by a properly completed certificate of insurance prepared by the insurance provider.**
 - This "Certificate of Insurance" must also show evidence that the vendor has:
 - Off premises liquor liability coverage, and non-owned and hired auto coverage.
 - (At a minimum) the local chapter, the house corporation, and Lambda Chi Alpha Fraternity named as additional insureds.
 - This insurance coverage shall be primary and not contributory or in excess.
 - Attach a copy of the Certificate of Insurance.
- **Agree in writing to cash sales only, collected by the vendor, during the event.**
 - Alcohol may not be purchased through the chapter treasury or through member pooling of funds.
 - Drink "specials" and chapter subsidized drink pricing is expressly prohibited.
- **Assume in writing (using the attached bartending services contract) all of the responsibilities that any other purveyor of alcoholic beverages would assume in the normal course of business including but not limited to:**
 - Checking identification cards upon event entry
 - Not serving individual that are under the legal drinking age.
 - Not serving individuals who appear to be intoxicated.
 - Maintaining absolute control of ALL alcoholic containers present.
 - Collecting all remaining alcohol at the end of the function (no excess alcohol, open or unopened is to be given, sold, or furnished to the chapter).
 - Removing all alcohol from the premise.

This form must be signed and dated by both the Vendor and the High Iota. In doing so, both parties understand that only through compliance with these stipulations will the chapter be in compliance with the Lambda Chi Alpha harm reduction policies.

High Iota: _____

Date: _____

Vendor: _____

Company Name: _____

Date: _____

Questions/Concerns

If you have any questions about the specific content in this document, please contact:
harmreduction@lambdachi.org.

If you are experiencing any technical difficulties with this document, please contact:
communications@lambdachi.org.

Visit Lambda Chi's Web Platforms

Website: lambdachi.org

Member Portal: mylca.lambdachi.org

Officer Portal: op.lambdachi.org

Stay Connected on Social Media

Like us on Facebook at: facebook.com/lambdachi

Follow us on Twitter: [@LambdaChiAlpha](https://twitter.com/LambdaChiAlpha)

Follow us on Instagram: [@LambdaChiAlphaHQ](https://www.instagram.com/LambdaChiAlphaHQ)



a lifetime of true brotherhood