

EVENT POLICIES & PROCEDURES February 6, 2009

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This guide has been written to help you, the event organizer, navigate through many independent systems to create a successful program. As every event is different, there are few hard and fast rules, but here are the general guidelines.

GROUP TYPES

There are 3 different types of event groups, depending on intent of the program and composition of the host group:

- 1. <u>Internal</u>: events fully planned and organized by Stony Brook University personnel for the purposes of conducting University business. Examples are staff meetings, intramurals, student club events and Admissions Open House.
- 2. <u>External</u>: events fully planned and organized by an organization not affiliated with Stony Brook University for the purposes of conducting non-University business. Examples are the Pianofest concert series and summer camps.
- 3. <u>Internal/External</u>: event planned in partnership between a University entity and an outside organization. These programs typically something involve a large public audience. Examples are Blood Drives and the NY Women's Conference.

STEP 1: Choose a Date & Secure Space

SBS ONLINE CALENDAR

http://calendar.activedatax.com/stonybrook/CalendarNOW.aspx?fromdate=2/1/2009&todate=2/28/2009&display=Month

The Stony Brook Southampton online calendar is a fairly accurate reflection of firmly planned programs. At the onset of the event planning process, it is a good idea to consult this calendar to review events currently planned on campus. If your event date is flexible, selecting an event date that does not conflict with other programs will reduce the stress on the campus for facilities, services and attendance.

SOUTHAMPTON OPERATIONS CALENDAR OVERVIEW

Space reservations are managed using the Southampton Operations Calendar in Lotus Notes. It is a shared calendar and user access is granted as Editor (able to book rooms) or Reader (view only access).

It is important that everything is booked in the Operations Calendar to:

- 1. Alert University Police. They unlock & secure spaces according to bookings and need to know where people plan to be in case of emergency.
- 2. Avoid usage of the same space by multiple groups concurrently. A group which has booked a space will have priority for using that space over a group that is in there without authorization.

NOTE: The SBS Online Calendar and the Southampton Operations Calendar are separate systems and ARE NOT LINKED. Information entered into one system will not display in the other.

OPERATIONS CALENDAR SCHEDULERS

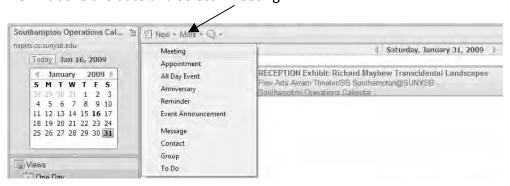
Schedulers have been designated for the following areas:

Academic Programs & Office of the Dean	Mario Sweatt
Admissions	Amy Borella
Avram Theater & Gallery	Len Ziemkiewicz
Center for Wine, Food, & Culture	Ginny Clancy
MFA in Writing & Literature	Adrienne Unger
SoMAS	Peggy Grigonis
Student Life (Administrative)	Camellia Lleras
Student Life (Student Activities)	Diane Redo
External Organizations	Megan Williams
Multipurpose	Michael McHale
	Megan Harned

BOOKING AN EVENT IN THE OPERATIONS CALENDAR

The process described below is the best way to see if a space is available, even if you are not ready to book an event yet.

1. Click "New" above the date and select "Meeting".



NOTE: "Meeting" is the only option that allows you to search available spaces.

2. "Subject:" = FIRM or HOLD: Event Name—Contact Name & Phone #

Subject: FIRM: Groudhog's Day Committee Meeting--Megan @ 2.5027

3. "When:" = include event setup, breakdown and space holds in Start and End times

NOTES: Consult building operating hours prior to booking.

Facilities staff is available Monday thru Friday, 7a-3:30p and require 1 hour to set up and break down a room

For example, an event time of Saturday, 9a-5p will be booked using 2 entries.



In this example, Facilities staff will set the room Friday, 2:30p-3:30p. The building is scheduled to close at 11p. The time period 3:30p – 11p is a <u>space hold</u> to prevent another group from using the space with a different setup.



The event runs 9a – 5p. The building is scheduled to open at 7a, therefore the room is booked accordingly to prevent another group from using the space with a different setup. This also provides 2 hours for the committee to set the room as needed for the program. (This is the <u>Pre-event</u> access time.) Booking the room until 6p provides the group time to clear their items out of the room for the next scheduled event.

4. Enter <u>all</u> repeat dates.

NOTE: If all repeat dates are not entered prior to searching for a space, the booking will be inaccurate and need to be recreated.

5. "Where:" = Rooms to be used. Multiple spaces can be booked to the same event. The spaces should be booked separately if they are being used at different times to ensure space is available for other users.

Click "Find Rooms" on the right side of the screen to search for availability.

NOTE: DO NOT USE "Rooms:" link on the left. Using the incorrect link will allow for double-booking of spaces.

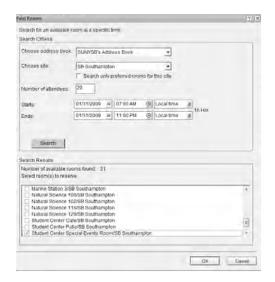


"Choose address book" = SUNYSB's Address Book

"Choose site" = SB Southampton

"Number of attendees" =
expected headcount
(It is better to estimate high.)

Click "Search". Check the box next to each room you want to reserve and click "OK"



The following spaces are bookable:

	Approximate	
Space	Capacity	Notes
Athletic Field	1000	Notify P. Sarubbi and M. Kampf when booked.
Chancellor's Hall 142	19	Limited availability
		Contact M. Sweatt
		Computer Lab —
		20 student workstations + 1 Instructor
Chancellor's Hall 201	35	Rolling Tables
Chancellor's Hall 202	20	Conference Style—4 tables + 15 chairs
		No shades—not ideal for A/V presentations
Chancellor's Hall 234	25	Tablet arm chairs plus instructor table
Chancellor's Hall 235	25	Tablet arm chairs plus instructor table
Chancellor's Hall 236	25	Tablet arm chairs plus instructor table
Chancellor's Hall 237	25	Tablet arm chairs plus instructor table
Chancellor's Hall 239	25	Dean's conference Room
Chancellor's Hall	150	136 Fixed Seats + 14 Standing
Duke Lecture Hall		Same as Chancellor's Hall 112
		No food allowed.
Chancellor's Hall	110 (Clear)	
Kanas Lobby		
Chancellor's Hall Lawn		
Chancellor's Hall Patio	25	
Fine Arts 123	30	Retract air wall to join with 124 —
		book both spaces if required
		Behind double doors farther from Lobby
		Tablet arm chairs plus instructor table
Fine Arts 124	20	Retract air wall to join with 123 —
		book both spaces if required
		Behind double doors closer to Lobby
		Tablet arm chairs plus instructor table

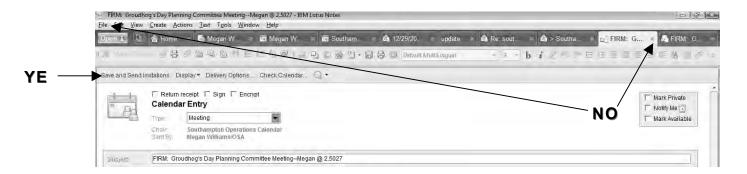
	Approximate	
Space	Capacity	Notes
Fine Arts 134	30	Retract air wall to join with 135 —
		book both spaces if required
		Behind double doors farther from Lobby
		Tablet arm chairs plus instructor table
Fine Arts 135	20	Retract air wall to join with 134 —
		book both spaces if required
		Behind double doors closer to Lobby
		Tablet arm chairs plus instructor table
Fine Arts 143	50	Tablet arm chairs plus instructor table
Fine Arts Avram Theater	426	416 Fixed Seats + 10 Wheelchairs
		Limited availability —
		contact L. Ziemkiewicz and M. Fasanella
		No food allowed.
Fine Arts Gallery	188 (clear)	Limited availability—
	134 (chairs)	contact M. Fasanella
	62 (tables & chairs)	
Fine Arts Lobby	313 (clear)	Inform M. Fasanella and L. Ziemkiewicz when
	224 (chairs)	booked.
	104 (tables & chairs)	
Gym – Large	2293 (clear)	Limited availability—
	1786 (bleachers)	contact J. McGrann
		See Fact Sheet
Gym – Small	290	Limited availability—
		contact J. McGrann
		See Fact Sheet
Marine Station 1	32	Classroom/Wet Lab
Marine Station 2	24	Bio Lab
Marine Station 3	36	Classroom/Lab
Natural Science 100	22	
Natural Science 102	25	
Natural Science 116	30	
Natural Science 120	25	
Student Center Café	100	Limited availability—
		contact M. Terry
Student Center Lobby	10	
Student Center Patio	1000	
Student Center	100	Adjacent to Servery & Café.
Special Events Room		
Student Center	45	Reservable for student events
Treehouse Lounge		
Student Center	20	
Wellness Center		

"Location" field should be used for spaces that do not exist in the spaces database, e.g. Residence Hall Lounges. (Residence Hall Lounges are available for use by student groups and should be booked thru Diane Redo.)

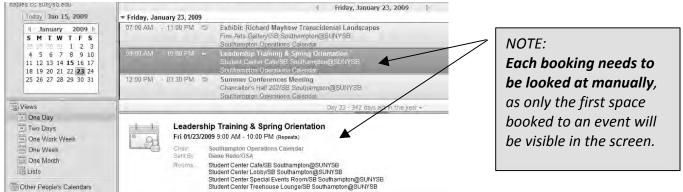
NOTE: Do not book rooms through your personal Lotus Notes Calendar the bookings will not show up in the Operations Calendar and the room will appear available.

- 6. "Description"
 - Event time
 - Scheduler Name, Date booked, work and cell phone# (in case you need to be contacted after hours)
 - If no setup is required (for spaces other than a meeting room), indicate "AS IS" or "no setup required".
 - Attach a program agenda if suitable
- 7. Complete the booking by clicking "Save and Send Invitations".

NOTE: DO NOT USE the "x" in the top right corner or "File, Close" to exit out of the booking.
Closing the window incorrectly will not save the event correctly and will allow for double-booking of spaces.



8. Verify your booking against other events on that day to ensure spaces have not been double-booked.



NOTE: The Operations Calendar is not a mail database and cannot accept meeting invitation acceptances or declinations.

CHANGING THE DATE AND/OR TIME OF A BOOKING

- 1. Use the "Remove Rooms..." link and select all spaces. Click "Save and Send Invitations" to close.
- 2. Open booking again. Change the date and/or time as needed.
- 3. Click "+ New Reservation" and use "Find Rooms" to research for available space.
- 4. Click "Save and Send Invitations" to close. If the booking is a repeat event, select "Just this instance" or "All Instances".

NOTE: Failure to remove spaces from a booking and search again with newly saved parameters will allow double-booking of spaces.

CANCELLING A BOOKING

- 1. Print a copy of the booking for future reference.
- 2. Click on the booking.
- 3. Hit Delete.
- 4. Choose "Just this Instance" or "All Instances" and "OK"

NOTE: Deletion of an event eliminates history.

SCHEDULING TIPS & TROUBLESHOOTING

- 1. If the booking for a recurring event will require modification (e.g. Lecture series or Orientation), it is better to book each occurrence as a separate entry.
- 2. If the desired space appears available in the calendar but does not show up as available:
 - Check date (s) and time(s) requested
 - The space may not be available for all requested dates. Check each desired date to see when it is booked and remove that repeat date from the search.
- 3. If the desired space is on "hold" for a potential program:
 - Contact the event organizer to see if the space can be released.
- 4. If the desired space is on "hold" because it is set up for a future event:
 - Contact the event organizer to see if the room setup for the future event will be suitable for your program. If so, you may take the room "AS IS", but you must make sure the space remains adequately for the following event.
 - If the same setup is not suitable for both programs, find an alternate venue or date.
 - If another venue or date is not available, contact Joe Russell to request additional staff to reset the space for your program. Incremental staffing fees will apply.
- 5. If the space appears double-booked in the calendar, contact Megan Williams for assistance.

STEP 2: Involve Facilities & University Police

Facilities & University Police need to be consulted to ensure event safety and prevent disruption to routine University activities. Communication of event needs is managed thru the Event Overview Form which should be emailed to Joe Russell, Patti Sarubbi and Megan Williams.

SPONSORSHIP

External organizations are required to obtain sponsorship by an internal department and should be indicated on the Event Overview Form. Events by external organizations must enhance one of the missions of the university: Education, Research, Healthcare or Community Service. A department "sponsoring" an organization on campus agrees to the following:

The application for use of facilities must include the written endorsement by a sponsoring department or recognized campus organization. Sponsorship requires that the sponsoring unit is familiar with the applicant, believes that the proposed activity is consistent with the mission of the University, and stands ready to indemnify the University for all outstanding obligations the applicant may have to the University. Having a sponsor does not guarantee that space can be made available or that University approval will be given for the event. The sponsor will be held responsible for securing any outstanding charges incurred by the individual or group requesting space. (P517)

Partisan political organizations may be permitted the use of University facilities under the following conditions:

- a. That the proposed meeting give promise of contributing to the educational purposes of the campus; and
- b. That the campus sees a reasonable possibility of making the facilities available for other viewpoints to be presented. (SUNY 5063)

FEES

All events incur costs to run the program, regardless of group type. The Event Overview Form helps Facilities & University Police to determine applicable event staffing fees. Facilities fees are assessed in 4-hour minimums (due to contractual obligations) and are based on the type of group and time of day:

- a) Internal or External
- b) Weekday, Weeknight or Weekend
- 1. <u>Internal</u> programs are not subject to space rental fees, but may be responsible for incremental Facilities fees.
- 2. <u>External</u> programs are responsible for covering all costs incurred as a result of producing the program. Space rental fees typically apply as well.

3. <u>Internal/External</u> programs typically share responsibility for event costs. Space rental fees and additional permits may apply, depending on the intent and details of the program. The scheduler needs to <u>coordinate these events with the Conferences & Events Specialist</u>. Sponsorship does not release an external organization from financial obligations for facilities costs or space usage fees <u>and</u> does not require Stony Brook Southampton to accept responsibility for applicable charges.

Facilities fees are not assessed for:

- 1. Regularly scheduled academic classes
- 2. Student club events without entrance fees
- 3. Long Island Blood Services (Blood Drive)

DEVELOPING A BUDGET

Some expenses to consider when developing an event budget include:

Facilities Fees (Custodial, Police, Parking, Grounds, Mechanic), Fire Marshall, Additional Staff, Housing, Transportation, Food Service, Technology/IT, Furniture rental, Delivery/Storage, Printing/Promotion, Signage/Banners, Nametags/Identifiers, Giveaways

STEP 3: Obtain Necessary Approvals

FUNDRAISING

Any fundraising on campus for an external beneficiary requires prior approval from the Vice President for Advancement. Requests for approval should be coordinated with Megan Williams.

RAFFLES

If any department conducts a raffle with net proceeds of greater than \$5,000 per event and the net proceeds during any calendar year are over \$20,000/calendar year, the NYS Racing and Wagering Board needs to be contacted to obtain an ID #. Following that, the group would need to obtain a local games of chance permit.

6 weeks out:

ALCOHOL PERMIT

 $http://student affairs.stony brook.edu/for/docs/alcohol_service_request.pdf$

An event which plans to serve alcohol must apply for a Site Liquor/Permit License with the New York State Liquor Authority (SLA Permit). FSA can obtain these permits 6 weeks out for a fee of \$36. If an outsourced caterer is to be used, they must provide required documentation. Permits must be displayed on site. All servers must be over 21 and TIPS trained. Students are not authorized to serve alcohol. If alcohol is to be served at a student event, the "Student Affairs Special Request to Cater Alcohol" Form must be submitted 4 weeks out. In addition, there must be a plan to contain alcohol to the approved serving area.

MEDIA PERMIT

http://naples.cc.sunysb.edu/Admin/HRSForms.nsf/pub/PROC0018

A Media Permit provides access to Stony Brook University's image and is required for any third party filming for feature stories and extended media coverage events on campus. Film includes video and photography. On an event-specific, limited basis, an exception may be made for 'breaking news', or unanticipated newsworthy events.

Any commercial operation (e.g. MTV, commercial TV crews, production companies wanting interesting site footage) is charged a fee for use of the campus property. Noncommercial operations may be subject to location fees. Guidelines for location fees are:

- National Media (eg ABC, NBC, IFC, SciFi Channel, etc) \$1,000
- Regional Media (eg NYC station), local (eg, Channels 12, 21), independent filmmakers -\$250-\$500.
- Online Journals \$100

Before coming on campus to film, all videographer/photographers and media organizations must provide a \$3 Million Certificate of Liability Insurance naming the State of New York, the State University of New York and SUNY Stony Brook as covered insureds.

Regardless of videographer/photographer or newsworthiness of the event, <u>signed waivers are</u> required from all individuals whose face might be recognizable before filming can occur.

The University shall be given a single copy of the film for promotional purposes. Subject to the University's right to use the film or parts thereof for institutional promotional purposes only, the videographer/photographer/media company shall own all copyrights in the film.

The right to access University property carries with it the responsibility to refer to the University and University campuses by their correct names.

3 weeks out:

TENT PERMIT

Any group planning to erect a tent needs to submit a tent permit application to the Fire Marshall 3 weeks in advance. A diagram of the tent must accompany the application. Tents must be erected at least 1 day prior to the event to allow for inspection by the Fire Marshall. A Fire Marshall is required to be on site for the duration of any event with a tent. Fees may apply.

A Tent Permit is generally not required for use of pop-up tents by internal groups, however the group is required to inform the Fire Marshall of any plans so it can be checked and equipped as necessary.

2 weeks out:

FOOD PERMIT

http://naples.cc.sunysb.edu/Admin/HRSForms.nsf/pub/EHSD0087

All food served at University-sponsored Campus and Public events must be obtained from the campus caterer or from a food establishment that is permitted by the Suffolk or Nassau County Department of Health Services. If the Campus caterer is not used, a Food Permit from the Department of Environmental Health & Safety is required. Under no circumstances may food for Campus or Public events be prepared or stored in any private residence or dormitory. All food must be prepared, transported, stored and served in accordance with University policy.

1 week out:

PERMIT TO VEND

A vendor is defined as any external organization that is selling or giving away any items or information. Vendors obtain permission for usage of University space by submitting the Application for Vendor Permit form to the Faculty Student Association at least 1 week out. The University sponsor is responsible for reserving space and any required equipment.

Vendors are prohibited from:

- 1. Marketing credit cards and student loans in any form.
- 2. Engaging in promotion or distribution of non-Pepsi beverages.
- 3. Selling books unless sponsored by a campus department that has complied with the University's contractual obligation to Barnes and Noble for right of first refusal.

Vendor fees include the Permit to Vend (\$35) plus space rental. As a general guideline, fees are assessed if the group will profit as a result of their presence on campus. Stony Brook Southampton reserves the right to require University Police to be present at the group's expense depending on the content and/or volume of vendor merchandise. Student club events involving product sales for purposes other than fundraising for the club may be subject to vendor fees and should be coordinated thru the Student Activities Coordinator.

STEP 4: Publicize the Program

There are various vehicles available to market your event, depending on which community you want to reach (Stony Brook Southampton, Stony Brook University or local communities).

1. Stony Brook Southampton online Calendar of Events

This is a shared University-wide calendar system and events are searchable by campus. Submit information to Mike Gasparino, Diane Redo or Megan Williams

2. "This Week at SBS" email newsletter
Submit information to Darren Johnson by 3p on Fridays

3. Press Release

Submit information to Darren Johnson for release approximately 10 days out

4. Campus Flyers

Submit to Diane Redo for approval, printing and distribution. Bulletin Boards are available in Chancellors Hall, Fine Arts, Student Center, Residence Hall, Marine Station, Natural Sciences, Atlantic Hall

5. Stony Brook University Campus Announcements

Submit your announcement to http://naples.cc.sunysb.edu/DoIT/newsflash.nsf and follow the instructions

6. "The Brook" alumni quarterly publication

Submit information via email to Joanne Morici

7. SB "Happenings" Bi-weekly Print Newsletter
Submit information via email to Lynn Roth, Office of Communications

8. Hamptons Calendar of Events Newsletter www.SouthamptonChamber.com/submit

STEP 5: Submit Event Support Requests

3 weeks out:

FIXIT TICKETS

Event setups are requested thru the FIXIT system. Requests are processed on a first-come, first-served basis.

FIXIT Tickets must be submitted **no later than fifteen business days** before the event.

- 1. Go to the Stony Brook Southampton Work Request website http://www.stonybrook.edu/fixit/southampton/
- 2. Select "Special Event setup requests"
- 3. Follow the instructions on the screen and "Launch FixIt"
- 4. Fill in the required fields:
 - "Type of Work" = "Special Event Setup"
 - CC: = joseph.russell@stonybrook.edu
 - "Short Description of Problem" = what do you need?
 e.g. Furniture Request, Custodial Support
- 5. "Specific Details" =

IN THE LARGER AREA PLEASE INCLUDE:

- Event contact name and phone number. (This is not necessarily the person entering the ticket. We must be able to contact someone to answer questions.)
- Event date (s)
- Event time (start and end) and when work should be completed by (if different)
- Furniture requested and layout instructions (e.g. how many chairs to a table.)
- Leave account number blank.

Always be as specific as possible.

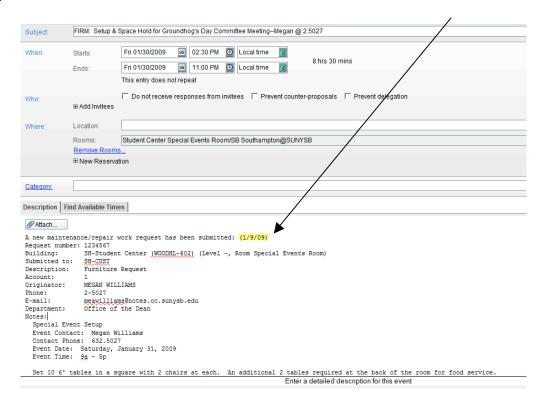
6. Review the Work Request and click "Issue this work request".

NOTES:

- Separate work orders are required if the event is more than one day and the days are not consecutive. One work order is sufficient if the event occurs over multiple, consecutive days and no setup changes are required for the duration of the event.
- Setups for weekend events are done on Friday.
- Email work order changes to Joseph Russell.
- If you have questions or need assistance, please call 632-5049.

NOTE: Before requesting a FIXIT ticket, check the Operations Calendar to ensure that the space is booked for your event

A copy of your FIXIT request will be delivered to your inbox. Copy and paste the contents of that message into the body of the Operations Calendar entry. Include the date the request was made.



EVENT DIAGRAMS

For complex setup requests, create a diagram and attach it in the Operations Calendar. Email a copy to:

- 1. Burke Irwin, Facilties
- 2. John Waldron, Facilities
- 3. Mike Kamf, Fire Marshall
- 4. Brett Auletta, Audio/Visual Services (when physical setup effects A/V setup)
- 5. Mary Terry, FSA Catering Manager (when catering food service are requested)

AUDIO/VISUAL REQUESTS

Audio-Visual services are requested by submitting the Audio/Visual Request Form to Brett Auletta. If you do not know the specific equipment the event requires, include a detailed description of what you want to do. Attach a copy of the request to the Operations Calendar.

2 weeks out:

REQUEST FOR POLICE SERVICES

Requests for additional (dedicated) police coverage must be submitted at least 2 weeks prior to the event. Cancellation of police services must be submitted 48 hours in advance.

As Soon as Possible:

CATERING ORDER

The Faculty Student Association maintains first right of refusal for all catered functions on campus. Catering orders should be submitted as soon as possible. Food service tables should be requested by event scheduler via the FIXIT system.

EVENT SIGNAGE

Temporary campus signage for special events can be requested by providing the following information to Megan Williams:

- 1. Word printouts of sign text (1 page per sign)
- 2. Arrows pointing in desired direction
- 3. Location # of each sign
- 4. Quantity of each sign required
- 5. Account #

Signs are landscape 24" x 28" and cost \$13 each. Please allow 1 week for delivery. The event coordinator is responsible for submitting a FIXIT ticket to have the signs put out and making arrangements for delivery of signage to Facilities. Additional charges may apply for installations required outside of facilities operating hours (Mon thru Fri 7:00 am – 3:30pm).

STEP 6: Running the Event

PRE-EVENT PREPARATIONS

- Review and confirm all orders.
- Test all Audio/Visual presentations and programs.
- Request a summary of each presenter's verbal material.
- Gather handouts and prepare registration materials.
- Gather all supplies and make delivery/pickup/storage arrangements.
- Share on-site contact information for event committee members.
- Meet with all staff/volunteers to confirm roles, review program agenda and resolve open items.
 - (As a guideline, adults need a 10 minute break per hour of program. Keep a stopwatch available to keep presenters on schedule, if required.)
- Does the event require that personnel are easily identifiable?
- Provide a guest list to the Guard's booth, especially if attendees are VIPs or expected outside of operating hours.

ON-SITE MANAGEMENT

- Arrive early and make sure spaces are unlocked.
- Walk thru spaces from the perspective of an attendee—is the overall impression what you want to convey?
- Walk-thru space(s) in advance to check setups.
 <u>Facilities</u> setups should be checked by 2:30p Monday thru Friday.
 <u>Audio/Visual</u> setups should be checked by 4p Monday thru Friday.
- Have copies of all orders & diagrams.
- Have the Emergency Contact List available for responsible event personnel.

POST-EVENT

- Set up post-event meeting.
- Provide prompt feedback—both good and bad. Resolve any issues in a timely manner.
- Take & disseminate minutes to share pertinent information with absent parties.
- Review any notes for future occurrences of the event.