



Event Planning Template

The goal of this document is to help you think critically about event planning. Prior to planning any event, we encourage you to review the Triangle Risk Management policy and any campus event requirements, so you have a full understanding of the expectations around event planning.

While following the guidelines outlined here will help to make any event safer, we recommend they be expressly followed when alcohol is present while on chapter premises or during any any situation sponsored or endorsed by the chapter, or at any event an observer would associate with the Fraternity.

For any questions around event planning, policy clarification, contract review, etc., please contact Triangle HQ for further assistance.

| Table of Contents | Page |
|------------------------------------------------------|-------------|
| Organization Philosophy..... | 2 |
| Risk Management Policies for Alcohol and Drugs | 3 |
| Planning Worksheet | 4 |
| Event Details | 4 |
| How Will Alcohol be Present? | 5 |
| BYOB Planning | 6 |
| Third Party Vendor (TPV) Planning | 8 |
| Guest Lists..... | 10 |
| Managing an Event | 11 |
| - Theme..... | 11 |
| - Event Monitors | 11 |
| - Transportation..... | 12 |
| - Construction/Decorations | 12 |
| - Prevention Questions | 12 |
| - Incident Response Plan..... | 13 |

ORGANIZATION PHILOSOPHY REGARDING ALCOHOL & SUBSTANCES

Triangle Fraternity is a values-based membership development organization that focuses on building brotherhood through character enhancement, leadership development, academic achievement, commitment to service, career preparation, life-long friendship and social experiences. The Fraternity believes that alcohol abuse prevents individual members from realizing their full potential as citizens and from exemplifying the obligations of brotherhood as set forth in the *Triangle Code of Ethics*.

We believe the moderate and legal consumption of alcohol, in and of itself, does not constitute a problem, but agree the illegal use and abuse of alcoholic beverages is widely recognized as a major problem in our society. Seeking to be a responsible member of the higher education community, Triangle is and will remain concerned about alcohol abuse.

We believe strongly in the betterment of men through the chapter experience. To support and guide that experience, our organization upholds the following philosophy related to alcohol and other substances:

- The Fraternity expects that our members follow state laws across the United States which have made consumption of alcohol illegal for people under 21 years of age and prohibit controlled substances.
- The Fraternity supports and enhances the mission of the institutions where we are present through application of student development theory.
- As a subset of the campus community, the Fraternity works to collaborate with our host institutions to address the problem of alcohol and substance misuse.
- The Fraternity works to address the negative behaviors associated with alcohol and substance misuse and abuse, and not simply the location of those behaviors. As such, Triangle seeks to address these behaviors with an educational approach.
- Through education, training, and mature adult guidance, we work to provide the tools to help students make good choices, and to understand the consequences of their choices. The organization will hold chapters and individual chapter members accountable for the choices they make.
- Triangle Ethic #8 challenges members to *“Maintain my self-respect by proper conduct at all times”*. Triangle expects personal responsibility from its members and accountability through local self-governance.
- The Fraternity follows a consistent and progressive discipline strategy with our chapters.
- We are concerned for the safety and well-being of our members.

Triangle members can only be drawn from the student population admitted to the institution. Should we pledge or initiate members whose habits are inconsistent with our philosophy, we will work with the institution to help these men change, or we will remove them from membership.

Adopted by National Council on Dec. 9, 2018

TRIANGLE RISK MANAGEMENT POLICIES

Undergraduate chapters are expected to follow the Risk Management Policies of Triangle. Where local or campus policies conflict, chapters should follow the most restrictive policy/ies. Ultimately, successful adherence to these policies can be summed up as, *“Obey the law; Live the Ethics”*.

ALCOHOL AND DRUGS

In any activity sponsored or endorsed by any Triangle chapter or at any event that a reasonable, objective observer would associate with a chapter, including those that occur on or off organizational premises:

1. Chapters, members, and guests must comply with all federal, state, provincial, and local laws. No person under the legal drinking age may possess, consume, provide, or be provided alcoholic beverages.
2. Chapters, members, and guests must follow the federal law regarding illegal drugs and controlled substances. No person may possess, use, provide, distribute, sell, and/or manufacture illegal drugs or other controlled substances while at any chapter facility or at any activity that a reasonable, objective observer would associate with the organization.
3. Alcoholic beverages must either be: (1) provided and sold on a per-drink basis by a licensed and insured third-party vendor (e.g., restaurant, bar, caterer, etc.); or (2) brought by individual members and guests through a bring your own beverage (“BYOB”) system.
4. Common sources of alcohol, including bulk quantities which are not being served by a licensed, insured third-party vendor, are prohibited (i.e., amounts of alcohol greater than what a reasonable person should consume over the duration of an event).
5. Alcoholic beverages must not be purchased with chapter funds or funds pooled by members or guests (e.g. admission fees, cover fees, collecting funds through digital apps, etc.).
6. A chapter must not co-host or co-sponsor, or in any way participate in, any activity or event with another group or entity that purchases or provides alcohol.
7. A chapter must not co-host or co-sponsor an event with a bar, event promoter, or alcohol distributor. However, a chapter may rent a bar, restaurant or other licensed, insured third-party vendor to host a chapter event.
8. Attendance by non-members at any event where alcohol is present must be by invitation only, and the chapter must utilize a guest list system and control access to the event. Attendance at any event with alcohol is limited to a 3:1 maximum guest-to-member ratio and must not exceed local fire-code or building code capacity of the event venue.
9. Any event or activity related to the new member joining process (e.g., recruitment, intake, pledge period, etc.) must be substance free. No alcohol or drugs may be present if the event or activity is related to new member activities, meetings, or initiation, including but not limited to “bid night,” “Big/Little” events or activities, “family” events or activities, and any ritual or ceremony.
10. Organizations, members, or guests must not permit, encourage, coerce, glorify or participate in any activities involving the rapid consumption of alcohol, such as drinking games.

The full document outlining all risk management policies is available online at triangle.org/thsi.

EVENT DETAILS

Utilize the following items to guide you in planning your event. Document for each of your events to help reduce the possibility of problems and guide you if they occur.

1. Who is planning the event?

Organization/s: _____

Contact Name: _____

Contact Office/Title: _____

Contact Email: _____

Contact Phone _____

2. Event Name/Theme: _____

(Please ensure name/theme is not likely to be offensive to campus/community nor focused on alcohol.)

3. Location of event:

Chapter Property (Either fraternity or university owned)

Rented Facility (Hotel, Restaurant, etc.)

Member(s) Residence

Other: _____

4. Beginning time of event: _____ AM PM

5. Ending time of event: _____ AM PM

6. Purpose of event:

Recruitment

Social/Mixer

Formal

Philanthropy

Service

Other: _____

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

Dry event (no alcohol)

BYOB

Third Party Vendor at chapter facility

Third Party Vendor at a remote location

Active Member Event Only

Alumni/Active Event

Member and Date Event

New member event

Philanthropy

Fundraiser

Event with one other fraternity / sorority

Event with more than one other
fraternity / sorority

Event with one other non-fraternal
student group

Event with more than one non-fraternal
student group

Sporting event

Parent Event

Recruitment

Service

Other: _____

8. The activities below could be considered high risk events. Does the planned event contain any of the following?
- | | |
|-------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Bring your own gun (trap/skeet shooting) | <input type="checkbox"/> Bonfires |
| <input type="checkbox"/> Sky diving/ parasailing/bungee jumping | <input type="checkbox"/> Tug-o-war |
| <input type="checkbox"/> Boxing tournament | <input type="checkbox"/> Rock Climbing |
| <input type="checkbox"/> Building of temporary structures | <input type="checkbox"/> Team building events that include make-shift ropes courses, trust falls, blindfolded guided walks (etc.) |
| <input type="checkbox"/> Pools | <input type="checkbox"/> Events take place at heights more than one to two feet from the ground |
| <input type="checkbox"/> Mechanical Bulls | <input type="checkbox"/> Event with live animals present (e.g., rodeo, petting zoo) |
| <input type="checkbox"/> Bounce Houses/Inflatables | |
| <input type="checkbox"/> Slip & Slides/Any other water feature | |
| <input type="checkbox"/> Obstacle course | |
| <input type="checkbox"/> Contact sports (e.g. football, rugby) | |
9. Have any written contract or agreement been signed for any part of this event? **YES** **NO**
(Our insurer, J.R. Favor will review any contracts at no cost, to insure the chapter liability coverage is not compromised.)
- Food caterer: _____
- Security guards: _____
- Bus/transportation company: _____
- Third party vendor: _____
- University facility: _____
- Hotel venue: _____
- Sports field: _____
- DJ: _____
- Band: _____
- Restroom and Waste Management: _____
- Other: _____
10. Will the total attendance exceed 3 guests per member/new member? **YES** **NO**
If YES, this is a large event and should be discussed with Triangle HQ. These types of events are not prohibited, but should be limited and may require professional security services and/or a special event coverage from our insurers.
-

HOW WILL ALCOHOL GET TO THE EVENT?

Triangle policies allow chapters to host events with alcohol in one of two ways: BYOB or Licensed, Insured Third-Party Vendor.

- BYOB [Bring Your Own Beverage]**
 Everyone brings their own alcohol, including members, new members, guests, and alumni who are over the age of 21.
- Third-Party Vendor [Bars, Restaurants, Catering Companies, Hotels, Etc.]**
 Contract with a licensed establishment or caterer to provide a cash bar and/or a licensed location to host your event.
- Dry Event [No alcohol will be present]**

MAKING BYOB EVENTS WORK

Alcohol is not prohibited at chapter events, but when present must be in accordance with law. BYOB is one solution, where members of-age are allowed to bring alcohol for their own personal consumption.

1. Are there any university or Fraternity/Sorority policies that deal with BYOB events on campus?
YES NO

Are there any university or Fraternity/Sorority policies that deal with BYOB events off campus? **YES NO**

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

2. All members and guests should be “carded” at the door to verify their age. Who is checking members’ and guests’ IDs at the door?

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

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

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

4. How many drinks will you allow each person of legal drinking age to bring to the social event?
Triangle policy prohibits BYOB of hard liquor and a reasonable limit on the amount and types of alcohol (i.e. 6-pack of beer, 1 bottle of 750 ml wine, four pack of wine coolers/ciders/malt beverages, etc.)

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

5. How will you manage the service distribution center?

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

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

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

- Chapter members
- New members
(If you utilize new members, it is recommended it is in conjunction with members)
- The university provides someone to distribute alcohol
- The chapter has hired a vendor to distribute alcohol

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

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

- Ticket System
 - Each member/guest is given one ticket per drink s/he checks in at the party.
 - The tickets are personalized with the type of drink the guest brings [e.g. Miller Lite, Smirnoff Ice, etc.].
 - The name of the attendee is written on the tickets.
 - The member/guest's drinks are delivered to the service distribution center by a member who is working the social event.
 - The member/guest redeems tickets [one at a time] for his/her drinks at the bar.

- Punch Card System
 - Each member/guest is given one punch card that has marks for each drink s/he checks in at the party.
 - The punch card is personalized with the type of drink the guest brings [e.g. Miller Lite, Smirnoff Ice, etc.].
 - The name of the member/guest is written on the punch card.
 - The member/guest's drinks are delivered to the service distribution center by a member who is working the social event.
 - The member/guest's ticket is punched or marked at the bar each time s/he claims one of the drinks s/he brought.

- Other [Describe]: _____

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

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

PLANNING A THIRD-PARTY VENDOR (TPV) EVENT

Examples of Third Party Vendors include bars, restaurants, catering companies, hotels, etc. *Third Party Vendors are NOT individuals who work as bartenders.* Look for licensed and insured vendors to limit liability exposure.

Planning the Event

1. Have you reviewed university and Triangle policies that deal with Third Party Vendor events on campus?

YES NO

Have you reviewed university and Triangle policies that deal with Third Party Vendor events off campus?

YES NO

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

2. Have you had Triangle's insurance company review the contract with the Third Party Vendor? *It is recommended that you reach out to your headquarters for contract questions and review. This is provided at no cost to chapters, provided it is done at least two weeks ahead of the event.*

Once reviewed, the contract should be signed and dated by both the person authorized by your chapter (i.e. chapter president, advisor, etc.) and the vendor. The agreement with the Vendor should include the following:

Certificate of Insurance:

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

The certificate of insurance should also show evidence that the vendor has, as part of his coverage, "off premise liquor liability coverage and hired and non-owned auto liability coverage."

The certificate of insurance should name as additional insured (at a minimum) the local chapter of the fraternity hiring the vendor, as well as the inter/national fraternity with whom the local chapter is affiliated.

License/s:

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

Contract/s:

Any contract/s should only be executed in the name of the undergraduate chapter (ex. University of Alaska Chapter of Triangle Fraternity), not just Triangle Fraternity.

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

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

In addition; the contract should NOT include the following:

- a) Drink specials for members/guests as part of the room rental fee;
- b) A set amount of free alcohol [e.g. 10 free pitchers, 40 free well drinks, 2 free drinks per member, etc.];
- c) A minimum amount of alcohol sales during the event;
- d) Free drinks for officers and organizer or drink specials.

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

- a) Confirm the TPV's liability policy includes a Waiver of Subrogation Clause favoring the Chapter;
 - b) The Chapter should be added as an Additional Insured on a primary basis to each TPVs Liability and Auto Policy;
 - c) Obtain proof that Workers Compensation coverage is in place for their employees;
 - d) Obtain a Certificate of Insurance from TPV confirming required coverages and Additional Insured protection is in place.
3. All members and guests should be "carded" at the door [and again at the time of purchase] to verify their age. Who is handling this at the door?
- The Third-Party Vendor provides this service [*Recommended*]
 - The chapter has hired a security company [*see [Security Vendor Checklist](#)*]
 - Chapter members
 - New members [*NOT recommended unless chapter members are also participating*]
4. How are you marking the guests, members, and new members who are of the legal drinking age [i.e. 21 and over]?
- Wristbands that have been dated and marked for that event
 - Specific hand stamp that is unique to the event
 - Other [*Describe*]: _____

BUILDING A GUEST LIST

Guest lists are essential to knowing who is at your event. Problems at events are more common from non-member guests than from our members. Also, in cases of accident or injury, guest lists can be helpful to our insurers as they investigate the incident or defend against litigation.

1. Are there any university or Fraternity/Sorority policies that limit the number of guests per member for chapter events? **YES** **NO**
If YES, what do those policies require?

2. Do the math. Triangle policies are no more than **three guests** per member/new member at events.

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

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

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

X

=

NOTE: Regardless of the ratio of members to guests, the total number of attendees [members and guests] should not exceed fire code capacity for the venue where the event is held.

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

- Spreadsheet or Sign-Up List
 - Create a spreadsheet and allow members to add guests' names.
 - Bring the list to a chapter meeting, post it online, or hang it on a bulletin board in the chapter facility.
 - Each member and new members' name should be on the list next to a blank space for each guest they're allowed to invite [e.g. two guests per member/new member].
- Numbered Invitations
 - Distribute numbered invitations to each member/new member to give to his guests.
 - These invitations should be printed professionally or created in a way so they can't be easily copied. Tickets cannot be sold or bartered.
 - Keep a list with each member/new member's name on it and the numbers of the invitations they were given.
 - During the event, keep a sign-in sheet at the door and write the guest's name next to the invitation number as s/he turns in the invitation.
- Closed Facebook Event
 - Create a closed [non-recurring] event with a specific start and end time.
 - Do NOT allow friends to extend the guest list.
 - Set the Privacy to "Invite Only."
 - A designated officer [e.g. Risk Management Chairman] should be set as the Host and administrator for the event.
 - Each member/new member should submit the names of guests to the Host for invitation to the event OR the Host should designate a specific period of time during which members will be given access to add guests to the event.
- Other [Describe]: _____

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

Triangle policies recommend the guest list be closed at least 24 hours prior to the event.

MANAGING THE EVENT

If you've planned and prepared for the event properly, managing it should be a lot easier. You know who is responsible for all facets and how to respond to potential problems. Now put it all together...

Theme:

1. Does the event have a theme? **YES** **NO**

If YES, what is the theme? _____

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

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

Event Monitors: [see Event Monitor Resource]

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

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

3. What is the system/process for selecting event monitors? _____

Suggested guidelines utilize a fair ratio of brothers/new members and not using new members only.

4. Create a list of the names / phone numbers for the assigned event monitors.

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

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

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

Transportation:

1. Will you provide transportation to and from the event? **YES NO**
If YES, how?
 Licensed transportation vendor [e.g. charter bus]
 Campus safe ride program
 Pre-paid cab service
 Designated driver program [consult the Triangle policy prior to selecting this option // see [Designated Driver Guidelines](#)]
 Other [Describe]: _____
2. What is the process/plan to ensure members/guests utilize the method of transportation both to and from the event? _____

Construction/Decorations:

1. Will there be any special construction/decorations for this event? **YES NO**
If YES, please describe: _____

Persons and/or company performing construction and contact information:
Company Name: _____
Contact Name/Phone: _____

Prevention Questions:

1. How many entrances will there be to the party? _____
It is safest to only have ONE entrance to the event.
2. Is this event is planned to exceed five hours in duration? **YES NO**
If YES, please explain why this event will exceed five hours.
3. Will ample food, other than snacks and non-alcoholic beverages be available? **YES NO**
Who will provide the food? What food/beverages will be served?
4. Are glass bottles prohibited from the event? **YES NO**
5. Will this event involve any physical activity? **YES NO**
6. Will doors to residential living be locked / secured during the event? **YES NO**
7. Will you stop the service of alcohol at least one hour before the event ends? **YES NO**
8. Will you select music that is NOT disrespectful or degrading to a particular group of people or culture?
YES NO
9. Will you ensure no illegal drugs and controlled substances are at the event? **YES NO**
10. Will you ensure there are no tables or paraphernalia within the event that are used for drinking games?
YES NO
11. Will you ensure the event does NOT involve strippers, exotic dancers, or similar, whether professional or amateur. **YES NO**

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

Incident Response Plan:

1. Have you reviewed Triangle’s Incident Response Plan for the event? **YES** **NO**
[see [Incident Response Plan](#)]

2. Will emergency services be readily available at the event? **YES** **NO**

3. Who is the officer in charge to contact emergency services if needed?
Name: _____ Phone: _____
Title: _____ Email: _____

4. If any incident occurs, who will be responsible for contacting:
 - Chapter President
 - Chapter Advisor
 - House Corporation President
 - Fraternity Headquarters
 - University OfficialsName: _____ Phone: _____
Title: _____ Email: _____

This guide is provided as a resource to Triangle Chapters to plan events that are safe, healthy and consistent with university and Triangle policies. Most important, it will help you plan for incidents that can occur despite all the work you do to prevent accident or injury. Whenever in doubt about how to apply policies or plan properly for an event, contact the Fraternity HQ.

Reminder: Events which can be expected to exceed 3 guests per member need additional attention long before the event occurs. These are larger events than our insurance policies usually cover and therefore may require a special event policy, as well as additional attention to security and other vendors. Contact the Fraternity HQ if you are contemplating a large event so we can help make your event safer and more successful.

Our thanks to FIPG, Pi Kappa Phi Fraternity, Holmes-Murphy and the North-American Interfraternity Conference (NIC) for portions of this resource.