

# EVENT PLANNING AND MANAGEMENT GUIDE

*This guide includes the policies and procedures that must be followed by all Pi Beta Phi collegiate chapters when planning events with or without alcohol.*



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## PI BETA PHI EVENT PLANNING POLICIES

Pi Beta Phi's Policy and Position Statements are the overarching policies affecting chapters and members. All Policy and Position Statements are available at [pibetaphi.org/policies](http://pibetaphi.org/policies). Those specific to event planning are included here and referenced throughout.

### CHAPTER SOCIAL EVENTS AND ACTIVITIES

1. A chapter social event is any gathering, official or unofficial, that is or could be perceived to be a Pi Beta Phi event for social purpose. If Pi Beta Phi as a chapter or its officers or individual members, acting on behalf of the chapter, participate in any way, formally or informally in planning, executing or promoting the event, it shall be treated as being co-sponsored by the Pi Beta Phi chapter. Social events with or without alcohol fall within this definition. Event policies apply to events such as mixers, functions or socials as well as date parties, semi-formals, formals, events sponsored by alumnae where collegiate members are present and other Pi Beta Phi hosted, co-hosted and planned events.
2. All chapter social events must be planned in accordance with Pi Beta Phi's policies and Event Planning and Management Guidelines, Panhellenic and institutional policies as well as all applicable federal, state/provincial and local laws.
3. Social events may be hosted at third-party venues or men's fraternity facilities, when permitted by the host institution or College Panhellenic governing council.
4. All co-hosts must be a recognized, chartered chapter by their inter/national organization and meet Pi Beta Phi's insurance requirements for co-hosts. A maximum of two other co-hosts are permitted, for a total of three hosting groups.
5. All events must have a defined start and end time and may not extend overnight. Pre- and post-parties are not permitted.
6. Members may legally and responsibly consume alcohol at permitted Pi Beta Phi events only when served by a licensed and insured third-party bartender or in accordance with Pi Beta Phi's BYOB policy. The possession of illegal drugs and marijuana, even where federally legal, is not permitted at Pi Beta Phi events.



## ALCOHOL SERVED BY THIRD-PARTY BARTENDER

A licensed and insured third-party bartender must be hired to serve alcohol with a cash bar unless the chapter has been granted the option to host BYOB events through Pi Beta Phi's BYOB review process. Chapters must adhere to the following alcohol service policies:

1. All policies, guidelines and safety precautions detailed in the Event Planning and Management Guide must be followed before, during and after the event.
2. All vendors must be properly licensed in accordance with state/provincial and local laws and provide certificates of insurance which confirm they meet Pi Beta Phi's minimum insurance requirements detailed in the Event Planning and Management Guide.
3. No chapter funds or money collected from members may be used to pay for alcohol directly or indirectly. Open bars or running tabs are not permitted and there may not be any agreements to meet a minimum alcohol purchase. Legal-age members may not purchase alcohol for underage members.
4. Alcohol service must end one hour prior to the end of the event.

## ALCOHOL SERVED THROUGH BYOB

After being granted the option to host BYOB events through the Fraternity's review process, chapters must adhere to the following BYOB Policy:

1. All policies, guidelines and safety precautions detailed in the Event Planning and Management Guide and BYOB procedures must be followed before, during and after the event, except as modified below.
2. A third-party bartender must be hired to receive and distribute alcohol. The handling of alcohol must follow the steps detailed in Pi Beta Phi's BYOB procedures.
3. No chapter funds or funds collected from members may be used to purchase alcohol for BYOB events.
4. Identification must be checked, and wristbands issued for members of legal drinking age by a third-party security company and designated event monitors.
5. No alcohol over 15 percent alcohol by volume (ABV), glass bottles, or communal alcohol such as kegs or mixed drinks are permitted.



## PERMITTED SOCIAL EVENT LOCATIONS

Chapters may host or co-host social events with or without alcohol at the following types of locations after confirmation that the venue meets all insurance and licensing requirements:

- Off-campus venues such as bars, restaurants, event spaces, private party rooms or event barns
- Men's Fraternity facilities when permitted by host institution and College Panhellenic governing council
- On-campus venues such as event spaces and private party rooms

Chapters must be granted advance approval in each instance by their regional Risk Management Specialist to host or co-host social events with or without alcohol at the following locations:

- Venues with features that are high-risk including pools/bodies of water, hayrides, bonfires, weapons and firearms, animals, trampolines, balconies, etc. A full list of high-risk events can be found through MJ Insurance at [mjsorority.com](http://mjsorority.com).
- Locations of historical, artistic or cultural significance
- Venues located outside the local campus community

## PERMITTED TRANSPORTATION OPTIONS

Third-party commercial transportation must be provided for all hosted and co-hosted events with or without alcohol, unless the chapter is granted the option for alternative transportation. A transportation plan, including check-in and check-out of members and guests, must be created and executed at each event.

Chapters may use the following types of third-party commercial transportation:

- Licensed and insured buses with professional driver
- Licensed and insured vans, limos or trollies with professional driver

Chapters may be granted the option to use the following alternative non-commercial transportation plans by their regional Risk Management Specialist:

- Walking plans to and from event locations within the local campus community
- Driving plans (personal vehicles) for chapter events without alcohol within 30 miles/50 kilometers of campus
- Taxi, Uber, or Lyft plans

Chapters may never use the following types of transportation plans:

- Party buses or other commercial transportation created and marketed for the purposes of consuming alcohol during transport
- Designated driver plans for events with alcohol





## USING THIS GUIDE

The Event Planning and Management Guide specifically addresses the planning and management of chapter events. The procedures reflect Pi Beta Phi's risk management policies and safety guidelines to reduce the risk of issues at chapter events. While not all procedures are listed in Pi Beta Phi's Event Planning Policy and Position Statements, all chapters are expected to follow these procedures and should consider them policies.

The following policies must be followed when planning events:

- Pi Beta Phi Policy & Position Statements
- All federal, state/provincial and local laws
- Pi Beta Phi Constitution & Statutes
- Campus and Panhellenic policies
- Chapter Bylaws

While the Director Social Events is responsible for directly planning social events, this officer also serves as a resource to other officers with event planning tasks. Each chapter officer assumes full responsibility for the event they are planning. See Appendix 1 for the [Event Planning and Responsibility Chart](#).

This guide is the primary event planning resource for any chapter officer planning an event. Chapters are discouraged from using professional party planners or production companies to plan events and should consult their regional Risk Management Specialist if unavoidable.

Responsibilities of chapter officers planning events include:

- Complete the Event Information Form.
- Identify and book acceptable venues and secure (but not sign) all contracts and certificates of insurance for the venue, security, transportation and alcohol/food service providers. **Only the Chapter President is authorized to sign contracts and agreements.**
- Review applicable policies and procedures before the event and enforce those policies and procedures during and after the event.
- Maintain contact with Alumnae Advisory Committee (AAC) Advisor throughout the event planning process and provide plenty of time to review plans, contracts and certificates of insurance.
- Plan events/activities that abide by all laws and Pi Phi, campus and Panhellenic policies and procedures.
- Carefully monitor expenditures so the event stays within the authorized budget.
- File all necessary event registration forms with the campus and/or Panhellenic.



Event planning responsibilities are supported by the **AAC Risk Management Advisor** on the AAC. Other direct AAC counterparts may be a resource as well.

The Regional Fraternity officer who supports event planning is the regional **Risk Management Specialist**. The regional Risk Management Specialist can be contacted by email at [riskmanagement#@pibetaphi.org](mailto:riskmanagement#@pibetaphi.org) (substitute the # for your region number).

## SOCIAL AND CHAPTER EVENT GUIDELINES

### EVENTS NOT PERMITTED

- **Alcohol at non-social chapter events:** Alcohol cannot be part of any chapter ceremony, recruitment event, Parents' events, Bid Day, Big/Little Sister activity, sisterhood, New Member or philanthropy events regardless of whether the philanthropy is social in nature.
- **Open parties:** Open parties have no guest list, and anyone is welcome; these types of events are not permitted. When members are attending a closed party, and it becomes open, members cannot stay at the event.
- **Overnight events:** All events must have a defined start and end time and may not extend overnight. Overnight chapter events (without alcohol) for members only must be approved by AAC and the regional Risk Management Specialist.
- **Pre- and post- parties:** Chapters and members cannot host or attend gatherings before or after an official Pi Beta Phi event, whether formal or informal, regardless of the location of the event or who is considered a host.
- **Out of town events:** Venues should be located within the local campus community, unless granted an option for an out of town event by their regional Risk Management Specialist.
- **Co-sponsored events with more than three total groups:** Pi Beta Phi chapters may co-host events with up to two other groups for a total of three hosting organizations. Events with four or more co-hosts are not permitted.
- **Events with groups who are not chartered:** Fraternities and sororities that have lost recognition from their inter/national organization are not eligible co-hosts. All co-hosts must be a recognized, chartered chapter by their inter/national organization and meet Pi Beta Phi's insurance requirements for co-hosts. Local groups with no inter/national affiliation must meet minimum insurance requirements and be recognized by the host institution.



- **Mystery/surprise date events:** Events where guests do not know who invited them and cannot be identified as being with a specific member are not permitted. Even if a guest birthday list is utilized, the anonymous nature of the event prevents the one-member, one-date accountability of good risk management. Events where members set each other up on “mystery dates” and guests are told who their date is at the start of the event are not permitted.
- **Events in private homes:** Chapter events should not take place in private homes, apartments, or residences. Approved chapter event locations are chapter facilities, campus facilities, 3<sup>rd</sup> party venues and those listed in the [Permitted Social Event Locations](#) policy.
- **Events with multiple locations:** Pi Beta Phi events must occur at a single location. Events that change locations like progressive dinners, bar/pub crawls and scavenger hunts should not occur. Reach out to your Risk Management Specialist for additional guidance.
- **Bar/pub crawls:** Events where there are multiple alcohol service providers or venue locations are not permitted. Bar crawls hosted by or associated with Pi Beta Phi cannot occur.
- **Parents’ events with alcohol:** The chapter is not allowed to host events involving alcohol when members’ parents or families are invited. This includes events during parents’ weekends, Moms’ or Dads’ day events, formals where parents are invited, etc. Parents cannot bring their own alcoholic beverages to Pi Beta Phi events.
- **Events sponsored by beverage businesses:** Events sponsored in any way by a business that makes or sells alcoholic beverages (including but not limited to beer companies, distributors, bars, etc.) are prohibited.
- **Events where food is prepared by members:** For all events where chapter members sell or fundraise with food, or when food is provided during social or recruitment events, food safety must be a top priority. Food should be institutionally prepared (made by a food handler licensee) for all events. Collegians may not use the commercial kitchen in a chapter facility to prepare food.





## CO-HOSTED AND CO-SPONSORED EVENTS

A co-sponsored or co-hosted event is an event hosted by a Pi Beta Phi chapter and other organizations, usually fraternities and sororities. Co-hosts are responsible for the planning and implementation of the event and are expected to contribute financially. A maximum of two other co-hosts are permitted, for a total of three hosting groups.

The following policies apply to selecting and partnering with co-hosts:

All co-hosts must be a recognized, chartered chapter by their inter/national organization and meet Pi Beta Phi's insurance requirements for co-hosts. Alumni members of chapters who have lost their charter are not acceptable co-hosts. Local groups with no inter/national affiliation must be recognized by the university/college and meet minimum insurance requirements for co-hosts.

- Parents' Clubs comprised of parents of Pi Beta Phi members may not sponsor, co-sponsor or fund events for, with or on behalf of the chapter. The chapter may not appear to be a co-host in Parents' Clubs events in any way. Should chapter members choose to attend an event hosted by a Parents' Club, the event must comply with all Pi Beta Phi policies and event planning and management guidelines.
- Co-hosts must meet all [minimum insurance limits](#) as listed.
- Co-hosts must be willing to comply with all Pi Beta Phi event planning policies and risk management procedures, even if they are more restrictive than their own organization's policies.
- Chapters should be aware that exclusively inviting guests to their events from a particular fraternity could qualify them as a co-sponsor and all policies around co-sponsoring should then be followed.
- There should be enough security guards (one for every 50 attendees) and event monitors (one for every 20 attendees) for all attendees, not just the Pi Phi members and their guests.

When co-hosting a social event with another fraternity or sorority, chapters should purchase food, decorations, non-alcohol items directly from merchants and pay musicians or DJs directly. Chapters should not pay the other group for "half the cost, their share, etc." of a co-sponsored event. This reduces the potential that Pi Phi's "share" is used directly or indirectly for alcohol.



## HIGH RISK EVENTS

A high-risk event is an event that brings a greater risk to our individual members, event attendees and Pi Beta Phi due to the more physical and/or dangerous nature of these activities. MJ Insurance provides a resource that defines risky events and provides examples of how to mitigate risk, which can be found [here](#).

Before planning a high-risk event reach out to your regional Risk Management Specialist to discuss what the event organizer and chapter needs to do to implement a strong risk management plan. This may include

- asking participants to sign waivers,
- creating a high-risk event plan,
- creating an emergency action plan.
- Some events may also require the review of the Director Risk Management, Grand Council and/or MJ Insurance.

You will need to consult with your regional Risk Management Specialist **at least 4 weeks before the event** to allow for enough time for good event planning, event education and event approval. High-risk events may only take place after they have been approved by the AAC Risk Management Advisor and regional Risk Management Specialist. Approval for a high-risk event is for that event only; additional individual events must be approved each time.

High-risk events may include, but are not limited to, the following:

- Animal-related events (petting zoo, animal shelter, puppy petting, etc.)
- Athletic or competitive events (workout classes, mud/color /zombie runs, other races, volleyball, basketball, baseball tournaments, etc.)
- Ropes courses, rock climbing/ climbing walls
- Paintball , skeet shooting or other events involving weapons
- Trampoline events
- Bounce houses/inflatables /hamster balls
- Events on or near open water or at pools
- Slip-and-Slides and dunk tanks
- Haunted attractions
- Mazes
- Hayrides
- Food eating contests – Pi Beta Phi does not allow food eating contests
- Bonfires
- Community-facing events with over 500 attendees



Any high-risk event that is approved should be **alcohol-free** and **utilize participant waivers** received from the Risk Management Specialist. Chapters are expected to have a detailed risk management plan in place and follow all Emergency Procedures should issues arise at the event. Waivers should be stored with the EIF and the risk management plan in the chapter files for five years.

Because many of these events are planned by a chapter's Community Relations and Member Experience teams, the VPRM and AAC Risk Managements should share this information with them in advance of planning a chapter's philanthropy, sisterhood, Bid Day or COB events that may involve any activities on the high-risk list.

## TIMING AND NUMBER OF EVENTS

When setting the chapter's calendar take the following into consideration:

- Pay special attention to over-programming and allotted budget.
- **No social events may happen until the chapter-wide risk management workshop has been presented and members have signed their Member Obligations.**
- Daytime events with alcohol should be avoided, as they can lead to dangerous levels of alcohol consumption
- In order to host an event late in the term, there must be **two regularly scheduled chapter meetings** left in the regular academic term, prior to the last day of classes and reading days or finals beginning. The regional Risk Management Specialist must approve any events with alcohol after that point. **It is recommended that no chapter social events occur in the last three weeks of the regular academic term.**

## RISK MANAGEMENT EDUCATION

Before each social event, the following risk management education must take place:

- Review event planning expectations, transportation plan, event monitor names, and emergency procedures with all members and non-members (Director Social Events)
- Review any applicable automatic consequences that a member who does not follow Pi Beta Phi's event policies, processes, or member conduct expectations. (Director of Operations or Director Member Conduct)
- Train Event Monitors (Director Social Events)



## SELECTING VENUE LOCATIONS

Refer to the [Policy and Position Statement on Permitted Social Event Locations](#) when selecting a venue location.

Use the following questions to evaluate a venue before finalizing:

- Does it meet Pi Beta Phi and campus Panhellenic rules for an event location?
- Can buses get there and either unload/load passengers and/or park?
- Is it large enough for the number of guests? What is fire code in this venue?
- Is it accessible to any members with limited physical abilities? Are there any accommodations that can be made to facilitate access for all members?
- Does the area have its own entrance with multiple exits? If not, is the space private and self-contained?
- Does the venue offer food service or allow for food to be brought in?
- Are there any building characteristics, natural hazards or activities that pose a risk or could be subject to damage such as being on a roof, balconies, bridges, pools, ponds, etc.?
- Does the venue have any other services or attractions (pools, public bar, hotel rooms, casino) that are against Pi Phi policy that members could easily patronize either during or after the event? How will you reduce the risk of attendees utilizing these services or attractions?
- Are there adequate restroom facilities for the number of guests?
- If someone chooses to smoke, where do they go and how will the entrance/exit be monitored?
- Will the venue be open to the public after our event? How will we ensure no members remain at the location at the end of the event?

Before the contract is signed and at the beginning of the event, the responsible chapter officer should do a walk-through of the venue with the facility manager. This walk-through should include:

- Discuss the setup of the space/rooms so you can plan how the event will flow; understand how the bartender will be setup (if applicable), and how they work with security.
- How many people does the space accommodate within fire codes? Where are exits and what do the restrooms look like? Are there other private spaces that could pose a risk (hallways, closets, etc.)?



- Note any obvious existing damage (torn carpet, damaged ceiling tiles, holes in walls) so the chapter is not held responsible later.
- Take pictures before and after the event.

## THEMES AND APPAREL

Pi Beta Phi chapters are expected to select event themes and apparel designs that align with the core values of the Fraternity. Prior to a chapter event (including philanthropy, parents' events, sisterhood retreats, etc.), AAC must review and approve both event themes and any T-shirt or apparel designs before they are presented to the chapter, or any orders are placed.

Event themes and event t-shirts are a highly visible aspect of event planning and the Fraternity. All event themes and T-shirts/apparel should be tasteful and appropriate with no plays on words, indirect references, or double meanings, no alcohol-related, culturally insensitive or implied themes, or no suggestions of promiscuity.

Be aware of the potential for copyright and trademark violations with the design. Chapters are strongly encouraged to use Pi Phi licensed vendors for any apparel or other favors. A list of approved vendors can be found [here](#).

Guidelines for apparel and event favors:

- Original designs
- No copyright infringements (use of images of artists, song lyrics, movie titles/quotes, company logos or brands, well-known fictional characters, etc.)
- No references to drugs, alcohol, sex, violence, death, or ethnicities
- May not include sponsors who are in the alcoholic beverage trade (alcohol companies, liquor stores, bars)
- Association or use of college logos, if not licensed through Affinity
- Items such as glass drinkware, stemmed drinkware, and shot glasses are discouraged
- The style of clothing should be considered for both appropriateness and the comfort and inclusivity of all members. It is a good idea to offer more than one style option.





If a submitted design is contrary to any of the guidelines above, it will be subject to further review by Affinity Licensing and Pi Beta Phi Headquarters prior to order confirmation or as a follow-up after items are received. After review, the chapter may be required to cancel the order.

All money for apparel must be collected through greekbill before the order is placed.

Individual classes or groups within a chapter (seniors in particular) should not make their own T-shirts for a chapter event that do not meet these standards. This action risks associating the unofficial apparel with the event and the chapter being held accountable as a result.

## FOOD AND NON-ALCOHOLIC BEVERAGES

**Food:** For all events with non-members, food should be institutionally prepared (made by a food handler licensee). This could include events where chapter members sell or fundraise with food, or when food is provided during social or recruitment events.

- At all events where alcohol is available, the chapter must pay for and provide ample amounts of food in several locations and served throughout the event.
- If the venue or caterer does not provide food, the chapter must arrange for food to be brought into the venue if the event includes alcohol. If a venue doesn't serve food or allow it to be brought in, the venue should not be used for an event with alcohol.
  - Be mindful of different food sensitivities and allergies within your group and ensure that all food items are labeled so attendees can avoid particular items.
- Collegians may not use the commercial kitchen in a chapter facility to prepare food.

**Non-Alcoholic Beverages:** At all events where alcohol is served the chapter must pay for and provide ample amounts of non-alcoholic beverages (other than water) in several accessible locations and served for the duration of the event.



## EVENT ATTENDEES (MEMBERS AND GUESTS)

Chapter events may include new and initiated collegiate members of Pi Beta Phi and their guests, or members of co-hosting groups and their guests. Events with alcohol planned for only one class in the chapter (e.g., senior event) are discouraged and may only occur if the option is granted by the regional Risk Management Specialist.

**Each member is permitted to bring one guest to each social event.**

- A guest is someone who has been personally (not anonymously) invited by a collegiate member of the chapter provided the guest is not a former member or current member who is ineligible to attend, as listed below. Mystery dates are not permitted. Every member is personally responsible for the actions of herself and her guest. All guests must be on the member/guest list, open events are not permitted.

The following individuals/groups cannot attend a Pi Phi social event as a member or guest:

- Members on Automatic Financial Probation or who are otherwise ineligible to attend due to a social restriction outlined in the chapter's bylaws or as part of the member's general probation terms.
- Former members including resigned members and dismissed members
- Alumna members including recent graduates, fifth year seniors, members who are no longer enrolled at the host institution, those who have been granted Undergraduate Alumna Status (UAS), and Alumnae Advisory Committee members
- Friends or family under the age of 18 years old (does not apply to members of Pi Beta Phi who are under 18)
- An individual who has been barred by Executive Council after thorough review of a concern in consultation with the Alumnae Advisory Committee and the regional Risk Management Specialist. Pi Beta Phi may restrict any non-member from attending a chapter event when determined it is in the best interest of members or the chapter.

As listed above, AAC members should not attend an event as a monitor or chaperone, per advice from the Fraternity's legal counsel. More information can be found in the AAC Manual in the Resource Library. **If your campus makes a request to require alumnae as chaperones/attend social events, contact your regional Risk Management Specialist immediately.**



## GUEST LISTS

Member/guest birthday lists should be compiled at least 24 hours in advance of the event and reviewed by Executive Council. A guest list includes all members and guests allowed to attend the event and their birthdates. Consider using the Social Event Roster in eReports (under the Membership tab) to help simplify this process and ensure accurate birthdays are reported. The birthdates listed on the chapter's guest list must match the identification they produce during event check-in. Hired security must be available to check identification and compare it to the guest list provided by the chapter.

## CONTRACTS AND INSURANCE

### WHAT IS A CONTRACT?

Contracts are required for all hired vendors for all events. A contract is a written agreement that is used to clearly determine the scope of any work to be performed, terms of payment, responsibilities of each party, and a specific date of performance. A contract may not look like a contract or be titled as a contract; it could also be labeled as an "agreement", "order", or in some other way. If the document obligates the chapter or vendor to do something, it can legally be considered a contract. Be aware that sometimes even verbal agreements could be considered a contract.

A vendor is defined as an outside company, individual or location that provides/sells a service or product to Pi Beta Phi.

Pi Beta Phi requires a contract for:

- Any venue or event location outside the chapter facility or a rented room on campus (Note: many campuses may still require a contract is signed.)
- Any instance where an individual or company is hired on behalf of your chapter to provide a service including
  - Transportation
  - Food/Alcohol service
  - Security
  - DJ or band
  - Photo booths, rental equipment, or other entertainment



## PROCEDURE FOR SIGNING A CONTRACT

**Only the Chapter President may sign contracts on behalf of the chapter after it has been reviewed and approved by the AAC Risk Management Advisor or AAC Chair.**

The following procedure should be followed for reviewing and signing contracts:

1. Director Social Events or other responsible chapter officer confirms the details of the service to be provided and requests a written contract from the vendor. The written contract is never signed on the spot, even if it has been in previous years.
2. The written contract is sent to the AAC Risk Management Advisor, AAC Chair, and Chapter President for review.
3. The AAC Risk Management Advisor and AAC Chair review the contract thoroughly, particularly looking for language that says, “hold harmless”, “indemnification”, or “additional insured”. See section on [Contract Red Flags](#) for more information.
  - IF the contract has **hold harmless or indemnification**
    - Contract with alcohol provider: The DSE should work with the vendor to have this language removed from the contract. If the language is not removed, the chapter will either need to find a new alcohol provider or have a dry event. Consult with your regional Risk Management Specialist.
    - Events considered high-risk: Work with the vendor to have this language removed from the contract. If the language is not removed, consult with your regional Risk Management Specialist.
    - All other events or vendors: Inform regional Risk Management Specialist (for knowledge only, no action) and approve contract if the vendor meets minimum insurance requirements.
  - IF the contract has **additional insured clauses** the following steps must be taken:
    - Contract with alcohol provider: The DSE should work with the vendor to have this language removed from the contract. If the language is not removed, advise the DSE to find a new alcohol provider or have a dry event. Consult with your regional Risk Management Specialist.
    - Events considered [high-risk](#): Inform the regional Risk Management Specialist and ask for guidance on next steps.
    - All other events: Inform regional Risk Management Specialist (for knowledge only, no action) and approve contract if the vendor meets minimum insurance requirements.



4. AAC Risk Management Advisor reviews the [certificate of insurance](#) and does not give approval for the contract to be signed until it has been confirmed that the vendor meets minimum insurance requirements, described later in this guide.
5. Once the contract is acceptable and the certificate of insurance has been reviewed, the AAC Risk Management Advisor and/or AAC Chair inform the Chapter President that the contract may be signed.
6. Chapter President signs the contract and gives it to the appropriate chapter officer to return to the vendor or returns it to the vendor directly.
7. A copy of the contract is filed in the responsible chapter officer's procedure notebook for future reference, even after the event is over.

## CONTRACT RED FLAGS

Entering into contracts brings greater risk to Pi Beta Phi when the following language is included:

**Additional Insured:** If a contract includes an additional insured clause, it means that an individual or entity, other than Pi Beta Phi (the insured), has obligated us to insure them during the period they are providing us services. This is very common in many contracts and can be acceptable with most vendors. **If the contract is with the vendor serving alcohol, never sign a contract with an additional insured clause.** Contracts for [high-risk](#) events should also be reviewed by the regional Risk Management Specialist before signing contracts with additional insured clauses.

**Hold Harmless or Indemnification:** A hold-harmless clause relieves another party of responsibility for negligent supervision or actions. Indemnity clauses obligate a party to cover the injury, losses, or damages of another party. The chapter should never sign a contract that "holds harmless" a vendor or individual or obligates Pi Phi to "indemnify" another party (including a campus) for losses or damages, without prior approval from the Fraternity. **If the contract is with the vendor serving alcohol, you may never sign a contract with a hold harmless or indemnification clause.**

If you receive a contract including language of this sort for an event with alcohol service or that is high-risk, your first step is to ask the vendor to remove this language. If the vendor will not remove the language, you must inform your regional Risk Management Specialist who will provide guidance on next steps. The RMS may advise you to submit to MJ Insurance for review. MJ Insurance asks for requests to be submitted two weeks in advance





of the event, however three weeks in advance of the event is preferable in order to allow for time to address issues. Submit contracts through MJ Insurance's [review request form](#).

## CERTIFICATES OF INSURANCE

A certificate of insurance represents the coverage the vendor, service provider or co-sponsor has purchased for their operations. A certificate of insurance is issued by or on behalf of an insurance company to a third party (Pi Beta Phi Fraternity) at their request. When planning events, you will **request a certificate of insurance from all vendors and co-sponsors** to confirm they carry their own insurance and that it meets our minimum standards. A certificate of insurance often looks like this:

The image shows a standard ACORD Certificate of Liability Insurance form. It includes sections for:
 

- COVERAGES:** A table listing various insurance coverages such as Commercial General Liability, Automobile Liability, and Umbrella Liability, with columns for policy numbers and limits.
- CERTIFICATE HOLDER:** A section for the insured or policyholder.
- CANCELLATION:** A section for the insurer's cancellation notice.
- ACKNOWLEDGEMENT:** A section for the certificate holder's acknowledgment.

 The form is titled 'CERTIFICATE OF LIABILITY INSURANCE' and includes a disclaimer at the top stating it is for informational purposes only.

The following items should be included on the certificate:

- Name of insured or policyholder (should be the venue or service provider hired)
- Insurance company
- Current date (the date the certificate was issued by the insurer)
- The dates of coverage should not be expired
- The coverage purchased by the insured (liability limits)
- Your chapter should be listed as the Certificate Holder
  - Note: this does not mean Pi Phi is asking to be added as an additional insured. It is only a way for us to confirm the certificate was issued for the purposes of our event. Many vendors do not understand this.



## MINIMUM LIABILITY LIMITS AND NECESSARY COVERAGE

The following limits of liability are a minimum that you should accept from a vendor, service provider or co-sponsor:

- General Liability: \$1 million
- Liquor Liability: \$1 million
- Automobile Liability: \$1 million
- Workers' Compensation/Employers Liability: \$100,000 per accident/\$500,000 per policy/\$100,000 per employee

Obtain certificates of insurance from the vendor, service provider or co-sponsor of your event as follows:

- **Venue and Food Service Caterer**
  - General Liability
  - Liquor Liability, if the venue is providing alcohol service.
  - Workers Compensation, if the venue is providing staff to serve alcohol, for security, etc.
- **Alcohol Vendor or Server**
  - General Liability, which includes proof that the vendor has, as a part of the insurance coverage, "off-premises Liquor Liability coverage"
  - Liquor Liability
  - Workers' Compensation
- **Security personnel**
  - General Liability
  - Workers' Compensation
- **Transportation services**
  - Automobile Liability
  - Workers' Compensation
- **Co-sponsors (including men's fraternities)**
  - Both organizations should sign vendor contracts
  - General Liability, with a minimum of \$1 million per occurrence



## PROCEDURE FOR REVIEWING CERTIFICATES OF INSURANCE

The following procedure should be used for obtaining and reviewing certificates of insurance:

1. Prior to signing any contracts or confirming dates, the Director Social Events or other responsible chapter officer should ask the vendor for a certificate of insurance with the contents listed on the previous page. A best practice is to email the vendor the list of what should be included, directly copied from this guide.
2. Once received, the certificate is provided to the AAC Risk Management Advisor for review.
3. The AAC Risk Management Advisor reviews to confirm the certificate indicates the minimum limits listed above and the certificate has been issued to the chapter.
  - If the certificate shows general, automobile, or liquor liability minimum limits that are lower than what Pi Beta Phi requires, inform your regional Risk Management Specialist and ask them if the chapter officer responsible should submit it to MJ Insurance for review using their review request form.
  - If the COI does not show Worker's Compensation, Pi Beta Phi is comfortable not requiring to see proof of Worker's Comp for venues/vendor that otherwise meet our general liability, automobile and liquor liability minimums. We always recommend that chapters use venues and vendors who are adequately insured.
  - If the certificate is from a co-sponsor such as a men's fraternity, you may encounter limits lower than what Pi Beta Phi requires. Please inform your regional Risk Management Specialist if this occurs.
4. AAC Risk Management Advisor informs the Chapter President, AAC Chair and responsible chapter officer that the certificate is approved, and the contract can be signed (if it is also approved).



## PROVIDING PI BETA PHI'S CERTIFICATES OF INSURANCE

Just as Pi Beta Phi requests certificates of insurance from vendors and co-sponsors, you may also be asked to provide a certificate of insurance to prove Pi Beta Phi carries insurance coverage.

Request a certificate of insurance showing Pi Beta Phi's coverage from MJ Insurance using their [review request form](#) preferably three weeks in advance of the event, but no later than two weeks. Please be sure to read all instructions carefully.

### MJ INSURANCE

Pi Beta Phi is proud to partner with MJ Insurance. MJ Insurance has more than twenty of the National Panhellenic Conference groups as clients. As you plan events, you may find MJ Insurance to be a very helpful resource. MJ Insurance services Pi Beta Phi in a number of ways including reviewing contracts and certificates of insurance, issuing certificates of insurance, answering insurance and event planning-related questions and providing relevant education to its clients and their members.

Please remember the following tips when working with MJ Insurance:

- MJ Insurance is a valued partner in supporting our event planning needs. Please note that MJ has many other clients to serve in addition to Pi Phi. Be patient and appreciative when communicating with them and treat them as you would your AAC advisors or other Fraternity personnel.
- Always submit documents (contracts, certificates of insurance) for review three weeks prior to the event.
- Use their [review request form](#) to submit your request. It is linked within this document several times and can also be accessed at [Mjsorority.com](https://mjsorority.com) under the services tab. Avoid calling them directly; the form is the quickest way to get your request processed.
- When submitting the form, read all instructions very carefully and be as detailed as possible about why you are submitting a request and what you need.
- MJ Insurance does not “approve” events. They are a resource that advises Pi Beta Phi on sound insurance practices so that the appropriate Fraternity officers can determine approvals.



## ALCOHOL SERVICE AT PI PHI EVENTS

Refer to the [Policy and Position Statement on Alcohol Served by Third-Party Bartender](#).

### ALCOHOL SERVICE GUIDELINES

In addition to the stipulations outlined in the Policy and Position Statement on Alcohol Served by a Third-Party Bartender, chapters are expected to follow the procedures below.

- Confirmation that the bartender is properly licensed, in accordance with state/provincial and local laws.
- Certificates of Insurance and contracts are obtained from the vendor and reviewed and approved by AAC in accordance with the contracts and insurance information in this guide.
- The vendor agrees to assume all responsibilities that any other provider of alcoholic beverages would in the normal course of business.
- Drink tickets should not be sold in lieu of cash payment.
- Bartender must maintain full control of all alcohol and its containers.
- Kegs are only permitted if that is the method by which the vendor dispenses the alcohol.

### WHAT IS BYOB?

BYOB stands for “bring your own beverage”. BYOB is an alternative way to managing alcohol service at Pi Beta Phi sponsored and co-sponsored events. When using a BYOB model, each individual attendee is responsible for providing their own alcoholic beverages which are served to them in an organized manner, following this procedure during the event.

While all members are responsible for cooperating with Pi Beta Phi’s safety standards for social events, it is the ultimate responsibility of the Director Social Events to ensure the chapter and any co-sponsoring organizations, follow all Pi Beta Phi BYOB and other event planning procedures and policies.





## CHAPTER ELIGIBILITY TO HOST BYOB

Although a third-party bartender is the preferred method for serving alcohol at chapter events, a Pi Beta Phi chapter may be granted the option to host BYOB events through Pi Beta Phi's BYOB application process.

**Approval process:** DSE should request the BYOB planning tool from the regional Risk Management Specialist. This tool will help the chapter develop a detailed BYOB plan. The BYOB planning tool and any additional documentation must be submitted to your regional Risk Management Specialist (after AAC reviews and approves) at least four weeks in advance of the event or annually by June 15 (if requesting for the entire academic year). A request for BYOB events should include, but is not limited to the following:

- Formal request on behalf of chapter with rationale about the necessity of BYOB events on this campus. Should include detailed information regarding why utilizing the BYOB Procedures will allow the chapter to provide a less risky environment for members.
- A copy of the chapter's detailed risk management plan for hosting a BYOB event including pre-event education plans, transportation details, check-in/out procedures, alcohol service, and monitoring.
- Proof of relevant automatic consequences or other documentation to explain how the chapter will hold members accountable for policy violations.
- A copy of the campus and/or governing council's policies on events with alcohol and risk management.
- A copy of the campus and/or governing council's event registration form to be completed by the chapter.
- Confirmation from AAC that they have reviewed and approved this request, along with any pertinent information from them.
- Any other information at the request of your Regional Team.
- Any requests for dispensation from the BYOB Procedure.

Submit the request to your regional Risk Management Specialist ([riskmanagement#@pibetaphi.org](mailto:riskmanagement#@pibetaphi.org)), copying your AAC Chair, AAC Risk Management Advisor, Collegiate Regional Director ([crd#@pibetaphi.org](mailto:crd#@pibetaphi.org)) and the Fraternity's Director Risk Management ([drm@pibetaphi.org](mailto:drm@pibetaphi.org)).



AAC is asked to review the chapter's application before it is submitted to the Regional Team. AAC should review and only approve if they believe the chapter has demonstrated they can handle the increased responsibility of executing a BYOB event. If there is doubt, they should contact the regional Risk Management Specialist immediately to discuss options and messaging to the chapter.

A chapter who is granted the option for a BYOB event, is also responsible for ensuring any co-sponsoring organizations are aware of Pi Beta Phi's BYOB procedures in advance of the event and comply with these procedures for the duration of the event.

Although a chapter may be granted a one-year option to host BYOB events, this option may be rescinded at any point during the year at the discretion of the Regional Team or Director Risk Management. Chapters may lose the option to continue utilizing a BYOB model as a result of poor planning and execution at events, lack of member accountability, change in campus policy or environment, or other factors. Approval for a single BYOB event is for that event only; additional individual events must be approved each time unless granted a one-year option.

The Director Social Events and Vice President Risk Management are responsible for clearly and formally communicating to the chapter the BYOB procedures and period for which the BYOB option has been granted.

## BYOB: ALCOHOL SERVED THROUGH BYOB

Refer to the [Policy and Position Statement on Alcohol Served through BYOB](#).

After being granted the option to host BYOB events through the Fraternity's review process, chapters must adhere to the following BYOB Policy:

1. All policies, guidelines, and safety precautions detailed in the Event Planning and Management Guide and BYOB procedures must be followed before, during, and after the event, except as modified below.
2. A third-party bartender must be hired to receive and distribute alcohol. The handling of alcohol must follow the steps detailed in Pi Beta Phi's BYOB procedures.
3. No chapter funds or funds collected from members may be used to purchase alcohol for BYOB events.
4. Identification must be checked, and wristbands issued for members of legal drinking age by a third-party security company and designated event monitors.
5. No alcohol over 15 percent ABV, glass bottles, or communal alcohol such as kegs or mixed drinks are permitted.



## BYOB PROCEDURE

The following procedures must be executed during any event where the option to serve alcohol through BYOB has been granted. Chapters must apply for a BYOB option before using the procedure below. Chapters who do not follow this BYOB procedure may lose the option to continue BYOB events.

<b>Entrances/Exits</b>	<ul style="list-style-type: none"> <li>• One well-lit entrance controlled and monitored by both hired, third-party security and at least two event monitors.</li> <li>• Copies of the guest list, prepared in advance, are checked for all members entering the event. Event monitors keep accurate record of those individuals who have entered the event.</li> <li>• Event monitors confirm each guest's birthday on the guest list while security checks guest IDs and compares to prepared guest list.</li> <li>• Members above the legal drinking age are given the appropriate wristband per the procedures below.</li> <li>• For safety, several exits may be made available but must be monitored to ensure they are not used as entrances.</li> <li>• Check-in for the event may not take place on Pi Beta Phi property when members are in possession of alcohol.</li> </ul>
<b>Guest Lists</b>	<ul style="list-style-type: none"> <li>• BYOB events must follow the same policies and procedures for guests as outlined in pages 14 and 15.</li> <li>• Chapters should follow the same procedures for compiling guest lists at BYOB events as they would follow for any other social event.</li> <li>• A guest list must be prepared in advance with all members and guests attending the event, including their birthday. A pre-populated birthday list for Pi Beta Phi members can be accessed in eReports.</li> <li>• Event monitors must keep accurate record of those individuals who have entered the event and note the quantity and type of alcohol they brought.</li> </ul>
<b>Identification and wristbands</b>	<ul style="list-style-type: none"> <li>• Members and guests who are of legal drinking age, as confirmed by security, should be given a non-adjustable, event specific wristband.</li> <li>• Wristbands should be labeled in advance of the event with the following information:               <ul style="list-style-type: none"> <li>○ Name of event</li> <li>○ Date of event</li> <li>○ Age group designation (over/under legal drinking age)</li> </ul> </li> </ul>



	<ul style="list-style-type: none"> <li>○ Name of member or guest (preferred, not required)</li> <li>• Members and guests who are not of legal drinking age should be marked with a designated hand stamp and are not given a wristband. These individuals do not consume alcohol.</li> <li>• Event monitors are expected to monitor alcohol consumption to ensure only individuals with wristbands are consuming alcohol at the event.</li> </ul>
<b>Quantity and types of alcohol permitted</b>	<ul style="list-style-type: none"> <li>• Each attendee is permitted to bring no more than a six pack of beverages that is less than 15 percent ABV.</li> <li>• All beverages must be in unopened cans or aluminum/plastic bottles in their original packaging. No glass bottles are permitted.</li> <li>• No communal alcohol such as kegs or mixed drinks are permitted.</li> <li>• The following types of alcohol are permitted at a BYOB event:               <ul style="list-style-type: none"> <li>○ Beer, cider, wine, pre-mixed malt beverage or hard seltzers with less than 15 percent ABV</li> </ul> </li> </ul>
<b>Tracking alcohol consumption</b>	<ul style="list-style-type: none"> <li>• All events must have a thoroughly outlined plan for tracking each guest's consumption of the alcohol they brought. Punch cards are the most common option for tracking alcohol consumption. A ticket system is not permitted.</li> <li>• Upon checking into the event, guests must drop alcohol off at a designed bar area immediately.</li> <li>• Alcohol will be labeled with the guest's name by the third-party bartender distributing the alcohol.</li> <li>• Once alcohol is labeled and stored, the guest will receive a punch card (or other tracking method).</li> <li>• As with wristbands, the punch card should be event specific and be prepared with space for the following information:               <ul style="list-style-type: none"> <li>○ Name of member or guest</li> <li>○ Birthday</li> <li>○ Name and date of event</li> <li>○ Total quantity and type of alcohol brought</li> <li>○ Space to punch up to six holes for consumed alcohol</li> </ul> </li> <li>• The bartender must punch the card every time a guest receives a drink. It is ultimately the member's responsibility to provide their punch card and ensure it is punched.</li> <li>• Punch cards should be collected when guests exit the event.</li> </ul>



<b>Distribution area/bar</b>	<ul style="list-style-type: none"> <li>• A third-party bartender must be hired to receive and distribute alcohol. Bartenders must meet all licensing and insurance requirements for Pi Beta Phi events, listed in the <a href="#">Contracts and Insurance section</a> of this guide on page 19.</li> <li>• One centralized location should be established for the distribution of all alcoholic beverages. It is to be monitored by third-party bartenders and event monitors during the event.</li> <li>• No other locations, especially individual resident rooms (if at men's Fraternity house), can be used for storing, distributing or consuming alcohol.</li> <li>• Beverages should be stored in an organized fashion to ensure bartenders can easily distribute the correct beverages.</li> <li>• Anyone who wishes to acquire their alcoholic beverage must present their punch card, show their wristband and return their empty bottle or can if this is not their first drink.</li> <li>• Only one beverage may be served at a time.</li> <li>• Bartenders may not serve anyone who is intoxicated, even if they have alcohol remaining.</li> <li>• Service of alcohol must end one hour prior to the end of the event.</li> <li>• Leftover beverages at the end of the night are disposed by the bartender.</li> </ul>
<b>Event Monitors and Security</b>	<ul style="list-style-type: none"> <li>• All Event Monitor and Security policies and procedure as outlined in this manual must be followed at BYOB events.</li> <li>• Security should be stationed at the event entrance, stairs or hallways leading to private rooms, restrooms and outside spaces.</li> <li>• Event Monitors should be stationed at specific spots or assigned to zones which include the event entrance, designated bar area, exits, restrooms, dancefloor area and stairs or hallways leading to private rooms.</li> </ul>

## TRANSPORTATION

Third-party commercial transportation must be provided for all hosted and co-hosted events with or without alcohol unless the chapter is granted the option for alternative transportation. A transportation plan, including check-in and check-out of members and guests, must be created and executed at each event. Buses are the preferred mode of transportation for all chapter events.





## THIRD-PARTY COMMERCIAL TRANSPORTATION: BUSES, VANS, LIMOS, TROLLIES

Chapters may use the following types of third-party commercial transportation:

- Licensed and insured buses with professional driver
- Licensed and insured vans, limos or trollies with professional driver

The officer responsible for planning the event, must work with the commercial transportation company to ensure they meet all requirements to provide services for a Pi Phi event. This includes gathering the following:

- Appropriate licenses
- Certificate of Insurance
- Contract

Information about requirements for certificates of insurance and contracts can be found within this guide. AAC must review all certificates and contracts and **only the Chapter President may sign contracts.**

When working with a third-party commercial transportation company, a detailed check-in/check-out plan and transport schedule must be developed. Prior to loading the vehicles, the driver must be informed of all policies applying to the trip and should be introduced to event monitors and Executive Council officers who are responsible for enforcing these policies during the ride.

Ensure your plan takes the following into account:

- All attendees must be informed that alcohol or drugs are not permitted during transport to the event.
- No matter the mode of transportation, event attendees should travel to and from the event together by the same mode of transportation – different or special transportation may not be used for certain groups of members.
- If the group cannot travel together due to size, create a schedule of shifts to and from the venue.
- Vehicles should depart from a single location and return to that location.
- Vehicles may not stop or detour at the request of passengers.
- Passengers may not be dropped off at any location other than the departure point.
- The transportation company should be aware that the party could be shut down at any time and vehicles must be available at all times during the event.



- Outline an emergency plan and back-up plan should a vehicle break down during the event.
- Assign event monitors on vehicles to monitor alcohol/drug use and other inappropriate or disorderly conduct.

## ALTERNATIVE TRANSPORTATION PLANS

The chapter may request an alternative transportation plan to walk, drive or take taxis or ride share transportation to the event.

**Walking Plan:** If an event venue is within very short walking distance (less than 1 mile), a walking plan to and from the locations within the immediate local campus community may be considered. Chapters must be granted the option to use this alternative transportation plan.

**Driving Plan:** Driving plans for chapter events without alcohol within 30 miles/50 kilometers of campus may be considered. Chapters must be granted the option to use this alternative transportation plan. Driving plans are never an option for events with alcohol and designated driver programs are never permitted in Pi Beta Phi.

**Uber/Lyft/Taxi Plan:** The use of ride share transportation such as Uber, Lyft or taxi may be considered for events with or without alcohol. Chapters must be granted the option to use this alternative transportation plan.

**Other:** There may be other unique transportation options available in your campus environment. Consult with your regional Risk Management Specialist on these options for alternative transportation.

**Approval process:** An Alternative Transportation Request (ATR) form must be submitted to your regional Risk Management Specialist (after AAC reviews and approves) at least four weeks prior to your event. This form is available in the [Resource Library](#). Unless otherwise stated, all alternative transportation plans are granted for only one event.

## TRANSPORTATION PLANS NOT PERMITTED

Chapters may never use the following types of transportation plans:

- Party buses or other commercial transportation created and marketed for the purposes of consuming alcohol during transport
- Designated driver plans for events with alcohol



## SECURITY AND EVENT MONITORS

It is important the chapter have security and monitoring at events with alcohol for the protection of chapter members and to assist with implementing and enforcing Pi Phi procedures. This is accomplished through both hired security and Pi Beta Phi Event Monitors.

### HIRED SECURITY

At all events with alcohol, there must be **one security guard for every 50 attendees**. Security may be provided through the venue or hired by the chapter externally, as long as they are unarmed and carry personal liability insurance (including workers compensation requirements outlined in this guide). A contract should always be in place for hired security, either through the venue or directly with the company or insured guard.

Off-duty police officers are not recommended as security. Officers are not covered under the police department's insurance while they are off-duty, and most do not have personal liability insurance. If the officers carry personal liability insurance, they may be used.

The chapter should hire security to complete the following tasks:

- Checking and enforcing the member/guest birthday list, both at the bus check-in location and the venue
- Checking identification of members and guests for age verification
- Keeping out any unwanted guests and non-members who are not on the guest list
- Ensuring only persons of legal drinking age are allowed to purchase or consume alcoholic beverages and preventing obviously intoxicated persons from purchasing or consuming
- Maintaining a safe and secure environment for guests and taking reasonable steps to maintain crowd control, prevent disorderly or offensive conduct
- Taking reasonable steps to prevent alcohol overconsumption or the use of drugs by members and guests
- Patrolling restrooms and the facility throughout the event
- Assisting in calling medical personnel or alternate transportation, if needed
- Peaceably and without the use of force remove disruptive and/or over intoxicated individuals from the immediate premises



## EVENT MONITORS

An “event monitor” is a sober, alcohol and drug-free volunteer Pi Beta Phi member who helps to manage the event. While it is every member’s responsibility to discourage and prevent risky behaviors at events, event monitors are specifically designated and trained to be a resource for each event. The Event Monitor Training PowerPoint can be used as a tool to support you in educating and training your event monitors. You can find this PowerPoint in the [Resource Library](#).

There must be **one event monitor for every 20 attendees** at all events with alcohol. Event monitors should also be selected for dry mixers and social events. If your campus or governing council requires more or less event monitors, the chapter must follow the more restrictive policy.

When selecting event monitors, use the following guidelines:

- Equal representation from each class (senior, junior, sophomore, initiated first-year students)
- Combination of Executive Council (at least one legal-age officer) and volunteers
- No New Members
- Should never be a consequence through the accountability process

Event monitors are selected and trained to complete the following tasks:

- Remain sober (alcohol and drug free) before, during and on the way home from the event
- Check and enforce the member/guest birthday list, both at the bus check-in location and the venue with hired security; event monitors do not check IDs
- Monitor behavior on buses or during transport to the event, particularly looking out for attendees consuming alcohol, getting sick or behaving inappropriately
- Assist with the management of walking or driving plans, if the chapter is granted the option to use this alternative transportation plan
- Introduce themselves to all hired vendors including bus drivers, security, bartenders and venue personnel so they are recognizable in the event of an issue
- Monitor that only legal age individuals are purchasing and consuming alcohol, intervene when obviously intoxicated attendees purchase alcohol, and strive to maintain an orderly, controlled environment and crowd
- Inform hired security of issues and seeking their assistance when appropriate
- Monitor restrooms and the facility throughout the event
- Assist in calling medical personnel or alternate transportation, if needed
- Accompany overly intoxicated attendees home early from the event via Uber/Lyft/taxi



## MANDATORY COMMUNITY PEER MONITORING

Pi Beta Phi supports the National Panhellenic Conference resolution expressing concern regarding mandatory peer monitoring.

Members and officers of Pi Beta Phi are not to act as agents of Pi Beta Phi, Panhellenic or the fraternity/sorority community in monitoring or acting as party checkers or patrollers for any other fraternities' or sororities' social events. In accordance with Pi Beta Phi policies and procedures, Pi Beta Phi officers and members are expected to monitor events hosted or sponsored, including co-sponsored, by their own chapter.

A Pi Beta Phi collegian who serves as a party monitor as a result of being a member or representative of GAMMA (Greeks Advocating Mature Management of Alcohol Program) or other similar campus associated programs does so as an individual. They do not do so as a member or officer having any capacity in relationship to Pi Beta Phi Fraternity.

## EVENT MANAGEMENT

Security and event monitors are a tool for reducing risk and creating a safer environment at social events. At any event, Executive Council is also responsible for event management. The following event management guidelines should be observed:

### ARRIVAL

- The officer responsible for the event should be on the first bus to arrive and immediately contact the facility manager or staff person in charge. Attendees must wait for the inspection to be completed to enter the facility.
- Conduct a thorough inspection of the facility with the venue manager, including restrooms and areas for use. Take photos during the inspection.
- Resolve any set up issues.
- Once the inspection has been conducted and set up issues resolved, attendees may enter the facility.
- Provide facility manager and vendors with the name and titles of the chapter officers who have authority at the event in case there is an issue, including Chapter President and event monitors.
- Introduce the security/event monitors, Chapter President, other Executive Council members who will remain sober throughout the event and review the timeline for the event.





- Review the wristband procedure and the member/guest birthday list with the bartender or facility contact explaining the expectation that it is to be used at the bar in addition to checking IDs.
- Confirm there is only one entrance to the event and set up the check-in station there.
- If payment must be made before the event, be prepared to submit payment.
- Have security and event monitors familiarize themselves with the facility, entrances, exits and restrooms.

## DURING THE EVENT

- Executive Council and/or security must be setup at the door to ensure no member or guest is admitted if they have not arrived as part of the approved transportation plan to the event or if they are not on the guest list.
- Regularly check in with the venue staff to monitor how things are going and identify issues.
- Every effort should be made to have event monitors confront the behaviors of other members and guests of the same class standing. For example, a senior event monitor should be utilized to confront other senior members.
- An option may be to divide the event space into zones monitored by event monitors who periodically circulate in that area.
- Members are responsible for their guest and should be confronted about inappropriate guest behavior.
- Security should monitor the exterior of the facility as well as restrooms at regular intervals throughout the event. A male security guard should patrol the men's restrooms.
- If a member or guest gets out of control or the party "gets out of hand," utilize security or call police to shut it down. **The Chapter President (or another designated officer in the Chapter President's absence) has the authority to shut a party down at any time for any reason.**
- Members and guests who are out of control or intoxicated can be sent home by cab from the event accompanied by an event monitor, at the expense of the member.



## EVENT WRAP-UP

- Before the buses leave, the officer responsible for the event should touch base with the venue staff member in charge and do a walkthrough of the facility to be sure there are no questions about the condition of the venue.
- Take the same photos you did before the event to protect the chapter from accusations that conditions were caused during the event.
- Payment for the event services, if not done at the start of the event.
- Reload buses; take roll to be sure all members and guests who attended are on the bus. No legal age members may remain at the venue such as a public bar or restaurant after the event has concluded.

## EVENT PLANNING TIMELINE GUIDE

The following is a resource you may use when planning events. It is not a checklist but can be used to organize priorities and tasks.

### 3-4 MONTHS BEFORE EVENT

- Review or request budgeted funds
- Consult with AAC about proposed date for event
- Add the event to the chapter calendar
- Identify co-sponsors/hosts, if applicable
- Discuss date/time availability, event needs and cost with the venue
- Discuss date/time availability, event needs and cost with alcohol/food service, security, transportation and other entertainment services
- Begin completing [Event Information Form](#)

### 1-2 MONTHS BEFORE EVENT

- Determine event theme and submit to AAC for approval
- Receive certificate of insurance, proof of proper licensing and written contract from venue, alcohol/food service, security, transportation and other entertainment services
- Provide AAC Risk Management Advisor and AAC Chair with all vendor contracts, certificates of insurance and licenses for review (no later than four weeks)
- Chapter President signs contracts after approval from AAC



- Request approval for event plan modifications to regional Risk Management Specialist; including alternative transportation plans, high risk events, and BYOB events.
- Announce date of event to chapter members
- Set date for all-chapter policy review and event monitor training prior to event

## 2-4 WEEKS BEFORE EVENT

- IF contracts or certificates of insurance need to be reviewed by MJ Insurance, submit the [review request form](#) three weeks before event
- Review entire event risk management plan with AAC counterpart
- Compile member and guest list with birthdays; review guest list with AAC counterpart and Executive Council
- Create a detailed check-in/check-out and transportation plan
- Select event monitors and communicate training dates and expectations
- Complete campus or governing council registration process (timing may vary)
- Purchase wristbands
- Inform House Director and other house staff of event date/time, risk management plan and services needed (if applicable)

## 1-2 WEEKS BEFORE EVENT

- Complete all-chapter policy review at chapter meeting
- Assign event monitors to responsibilities and areas/zones to monitor
- Train event monitors
- Discuss Emergency Procedures and event risk management plan with Executive Council
- Create an emergency contact sheet, make sure phone numbers for AAC and the Pi Beta Phi Emergency Hotline are in the Chapter President's phone contacts
- Do venue walk through and confirm all risk management precautions are in place
- Confirm all reservations with vendors including alcohol/food service, security, transportation, and other entertainment services
- Purchase event decorations and assign members to assist with decorating



## 1-2 DAYS BEFORE EVENT

- Purchase or order food and non-alcoholic beverages
- Send final reminder about check-in and transportation procedures to all members
- Send final reminder to event monitors with their arrival times and responsibilities
- Submit final guest list to campus or governing council, if necessary
- Print guest lists for security and event monitors at bus and venue check in

## DAY OF EVENT

- Set up and coordinate check-in at designated location or chapter facility
- Direct event monitors and Executive Council members
- Upon arrival at venue: confirm check-in procedure, do final walk through with venue and take photos of all spaces, including bathrooms, discuss alcohol service expectations with bartenders, etc.
- Address member and vendor issues as they arise, following all Pi Phi Emergency Procedures

## AFTER EVENT

- Refer members for member accountability as a result of policy violations by members or their guests
- Complete Event Information Form and file it in your procedure notebook
- Schedule event debrief meeting with the Chapter Leadership Team, Executive Council and/or AAC Counterpart. Take good notes on future improvements to place in procedure notebook
- Send thank you notes to event monitors, assisting Executive Council members and vendors



## EVENT BUDGET INFORMATION

All social budget information and expenses must have advance approval of the Vice President Finance/Housing (VPFH). Here are some budget pointers:

- At the beginning of the fiscal year, the Director Social Events and VPFH should break down the total amount into allocations for each event on the calendar.
- Chapter budget provides the funds for social events for all members. Members are never charged for their attendance nor is anyone refunded any portion of their local dues if they don't attend.
- Care should be taken to avoid expensive special assessments (T-shirts, apparel) that may create a financial burden for some members. Special assessments should only be ordered after vote of the chapter (and should be minimal in number).
- A careful record, including receipts, should be kept of all expenditures for each event.

Making payments for event-related expenses should follow these guidelines:

- Members may not use their personal credit card to secure a venue or any service with a deposit.
- Most venues ask for a large deposit at the time of the reservation. Do not reserve without consulting AAC. Most venues will also ask for the balance at the start of the event if the contract does not include food/beverages by consumption.
- No chapter funds may ever be directly or indirectly used to pay for alcohol. A chapter may not cover the cost for alcohol and charge members after the event.
- Chapters may not commit to a minimum alcohol purchase during the event.





## COMPLETING THE EVENT INFORMATION FORM

The Event Information Form (EIF) is a resource for organizing and recording all aspects of planning any event. The officer responsible for planning the event must complete an Event Information Form. They should use the VPRM as a resource if they have any questions about how to complete the form. An Event Information Form should be completed for every event, including philanthropies, sisterhood events, Bid Day, COB events, etc. Information pertinent to the event that is not included in the fields on the form can be captured in the notes sections. Any post-event notes that might be helpful for future events should be recorded as well.

The form may be filled out electronically or by hand and is stored in the appropriate chapter officer's hard copy or electronic binder/procedure notebook.

Along with the completed Event Information Form, keep the following attachments from the event:

1. Copy of campus or council event registration and approval
2. Member/guest birthday list
3. All vendor contracts and certificates of insurance
4. All receipts
5. Any waivers that were signed

The form must be completed accurately because it serves as a reference for future event planning as well as for some required information on Fraternity reports, like the Risk Audit Report. The form is for recordkeeping purposes. It is not an approval checklist.

## RESOURCE: EVENT INFORMATION FORM

<p><b>This form must be completed for every chapter event and kept in the files of the responsible chapter officer. It must also be submitted to your AAC for approval.</b></p>				
Event Name (& Theme):	<a href="#">Click here to enter text.</a>			
Event Date:	<a href="#">mm/dd/yyyy</a>	Start Time:	<a href="#"> </a>	End Time:
Event Type:	<input type="checkbox"/> Social, mixer, exchange, function, etc. <input type="checkbox"/> Formal <input type="checkbox"/> Date Party <input type="checkbox"/> Philanthropy <input type="checkbox"/> Sisterhood <input type="checkbox"/> Other, please specify: <a href="#">Click here</a>			
Is this an event with alcohol?	<input type="checkbox"/> Yes <input type="checkbox"/> No	How many event monitors will you have at this event? There should be <b>one event monitor for every 20 attendees</b> at all events with alcohol.	<a href="#">Enter number here</a>	
Describe Event Plan/Concept	<a href="#">Click here to enter text.</a>			
Co-sponsors (partners):	1. <a href="#">Click here to enter text.</a>		2. <a href="#">Click here to enter text.</a>	
Co-sponsor contacts (1):	Name, affiliation, phone: <a href="#">Click here to enter text.</a>			
Co-sponsor contacts (2):	Name, affiliation, phone: <a href="#">Click here to enter text.</a>			
Campus or council event registration required?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> If yes, attach copy of event registration submitted. <input type="checkbox"/> If notice of approval received, attach copy.		
Is the event high-risk? <i>(Consult your Risk Management Specialist)</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No	Does the event require participants to sign waivers? <i>(Consult your Risk Management Specialist)</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Anticipated Attendance	# Pi Phis: <a href="#">Click here</a>	# Pi Phi guests: <a href="#">Click here</a>	# Co-sponsor members & their guests: <a href="#">Click here</a>	<input type="checkbox"/> Attach member/guest birthday list.



<p>Confirmed all members have signed Member Obligations for the year</p> <p><i>(Work with the Vice President Operations to obtain the number of members who have signed their Member Obligations and follow up with all members who are unsigned)</i></p>	<p><input type="checkbox"/> Yes, <a href="#">Enter number here</a> members signed Member Obligations this year.</p> <p><input type="checkbox"/> No, <a href="#">Enter number here</a> members have not signed Member Obligations this year.</p>
<p align="center"><b>Event Management</b></p>	
<p><b>Facility Name:</b></p> <p>Address, Contact name, phone, email</p>	<p><a href="#">Click here to enter text.</a></p>
<p>Type of venue</p>	<p><input type="checkbox"/> Restaurant    <input type="checkbox"/> Private Party Room    <input type="checkbox"/> Bar    <input type="checkbox"/> Event Space</p> <p><input type="checkbox"/> Other (describe): <a href="#">Click here to enter text.</a></p>
<p></p>	<p>Notes: <a href="#">Click here to enter text.</a></p>
<p><b>Transportation Plan:</b> <i>Company name, address, Contact name, phone, email tax ID number</i></p> <p><b>OR Alternative Plan.</b> <i>If carpooling list, driver names:</i></p>	<p><a href="#">Click here to enter text.</a></p>
<p><b>Alcohol Vendor:</b></p> <p><i>Company name, address, contact name, phone, email, tax ID number</i></p>	<p><a href="#">Click here to enter text.</a></p>
<p><b>Food &amp; Beverage Vendor or Plan:</b></p> <p><i>Company name, address, contact name, phone, email, tax ID number</i></p>	<p><a href="#">Click here to enter text.</a></p>



<b>Security Company:</b> <i>Company name, address, contact name, phone, email, tax ID number,</i>  <b>How many security guards is the venue providing?</b>	<a href="#">Click here to enter text.</a>		
<b>DJ/ music/ entertainment plan:</b>  <i>Company name, address, contact name, phone, email, tax ID number</i>	<a href="#">Click here to enter text.</a>		
<b>Contracts &amp; Insurance</b>			
Contracts (attach)	<input type="checkbox"/> Facility	<input type="checkbox"/> Transportation	<input type="checkbox"/> 3 <sup>rd</sup> Party Alcohol Vendor <input type="checkbox"/> Security <input type="checkbox"/> Other
Certificates of Insurance	<input type="checkbox"/> Facility	<input type="checkbox"/> Transportation	<input type="checkbox"/> 3 <sup>rd</sup> Party Alcohol Vendor <input type="checkbox"/> Security <input type="checkbox"/> Other
Officer Planning Event	Name, officer: <a href="#">Click here to enter text.</a>		
Facility inspection upon arrival at the event	Done with Facility Rep? <input type="checkbox"/> Yes <input type="checkbox"/> No	Who took before/after photos? <a href="#">Click here</a> Where are they stored? <a href="#">Click here</a>	
Name of AAC who Approved Event: <a href="#">Click here</a>	Date AAC Approved Event: <a href="#">Click here</a>	Other Documentation: <a href="#">Click here to enter text.</a>	
<b>Other Event Notes</b>			
<a href="#">Click here to enter text.</a>			



## APPENDIX 1: EVENT PLANNING AND RESPONSIBILITY CHART

The Event Planning and Responsibility Chart is meant to be a guide, not a requirement. If your chapter holds responsibility for one or more of these events with a different chapter officer, feel free to use your current procedures.

Every officer may delegate planning and execution of an event to a committee that reports to them; ultimately, though, the officer is the one responsible for ensuring the event is executed in accordance with Pi Phi policies and manuals.

	Recruitment & COB Events	Bid Day Celebration	Pledging & Initiation Ceremonies	Big/Little Reveal	Parents'/ Family Events	Date Parties/ Formals/ Socials/ Mixers	Sisterhood Events
<b>CP</b>	<i>Ultimate Oversight &amp; Signing of Contracts</i>						
<b>VPRM</b>	<i>Review contracts, if applicable</i>	<i>Review contracts, if applicable</i>	<i>Review contracts, if applicable</i>		<i>Review contracts, if applicable</i>	<i>Ultimate Oversight</i>	<i>Review contracts, if applicable</i>
<b>VPME</b>		<i>Ultimate Oversight</i>	<i>Ultimate Oversight</i>	<i>Ultimate Oversight</i>			Planning and Execution
<b>VPCR</b>					Planning and Execution		
<b>VPR</b>	Planning and Execution						
<b>DNME</b>		Planning and Execution		Planning and Execution			
<b>DFH</b>			Planning and Execution				
<b>DSE</b>						Planning and Execution	
<b>DPPE</b>		<i>Pre-event risk management education</i>			<i>Pre-event risk management education</i>	<i>Pre-event risk management education</i>	





	Philanthropy/ Service Events	Homecoming/ Alumnae Events	Founders' Day/Awards Luncheon	Leadership/ Officer Training	Senior Ceremony	Scholarship/ Recognition Ceremonies
<b>CP</b>	<i>Ultimate Oversight &amp; Signing of Contracts</i>					
<b>VPRM</b>	<i>Review contracts, if applicable</i>	<i>Review contracts, if applicable</i>	<i>Review contracts, if applicable</i>		<i>Review contracts, if applicable</i>	<i>Review contracts, if applicable</i>
<b>VPME</b>			Planning and Execution		<i>Ultimate Oversight</i>	Planning and Execution
<b>VPCR</b>	<i>Ultimate Oversight</i>	Planning and Execution				
<b>DPPE</b>		<i>Pre-event risk management education</i>				
<b>DSP</b>	Planning and Execution					
<b>DLM</b>					Planning and Execution	
<b>DL</b>				Planning and Execution		

