

Checklist for Event Management (For use by Cornell University Event planners)

(Note: Confirmation for guest room reservations are not addressed in this checklist. These types of transactions can be approved by the end user.)

Three key items to expedite process successfully:

- a. Complete the attached addendum, have the hotel/facility complete and sign the addendum
- b. Review the hotel/facility contract. Continue dialogue with hotel/facility until needs are met; once satisfied, place initials and NetID in margin next to signature line on the contract.
- c. Forward addendum and hotel/facility contract to your BSC/FTC for processing (the BSC/FTC will send the completed paperwork and requisition document to Procurement Services)

Indicated below are details designed to assist with executing an event with a hotel or facility in the United States:

1. Defining the Event

- To find a hotel/facility that Cornell has utilized in the past, search the "Find a Supplier" application (<http://spendviz.dfa.cornell.edu/kfs/VendorSearch.aspx>). These establishments have been set up in KFS and will likely have knowledge of Cornell business practices. To search effectively, include the commodity code 90110000. Starting in January 2015, the application will be updated such that you will be able to add a city, state, or zip code to find a hotel/facility in the location of choice.
- Be sure to obtain a written quote from the hotel/facility which includes all of your requirements (including room set-up, menus, bar service, etc.).
- Request the hotel/facility to provide a copy of the contract they intend to use. This will give you, as an event planner, the opportunity to read the contract in advance of the event, and allow for negotiation of items such as:
 - o Amount of the gratuity (15-20% is recommended)
 - o If "blocking rooms" for the event, request one "free" room for every 30-50 rooms booked
 - o Potentially free meeting room, discounted (or free) easels, overhead projector or microphones
 - o If having an Open Bar, be sure to obtain clarity on how the hotel/facility counts participants (i.e. coins, tickets provided by hotel/facility)
- If the event has hired group transportation that Cornell is paying for, or involves travel to a foreign country, Risk Management should be notified. Additionally, for international events, please register on travelregistry.cornell.edu.

2. Contracting the Hotel/Facility

- Be sure to obtain an email address/contact name/phone to identify the person with whom initial arrangements were made. Share the contract and attached addendum upfront so that the hotel/facility understands Cornell business practices and timing.
- Provide the hotel/facility with as much information upfront as early in the process as possible (i.e. copy of contract addendum, etc.). Once you have shared the addendum, have a conversation to advise the hotel/facility of Cornell policies (no upfront payments for the

total amount, prefer purchase order, insurance certificate is required and Cornell needs at least 7-10 business days to return contract).

- When working with the hotel/facility, please advise the need to have 7-10 business days to get deposit monies to them and have their contract reviewed. Please advise them that Cornell does not have a **separate** events department and that hotel/facility/event requests are handled as part of all transactions for the University.
- Ensure there is an understanding of payment - Cornell policy does not allow payment upfront for the total amount. Please note that paying a deposit does not preclude the need for a purchase order.
- Gather all of the information from the hotel (quotes, contract, etc.) and initiate the transaction as soon as possible. Follow your BSC/FTC process to initiate the transaction (i.e. start the requisition or "I Want" process as soon as you can). Please do not wait until you are near the date of the event to start the process with the BSC/FTC.
- Small Venues: even if the event is held at a small venue (i.e. room at a library, bird club, or **location** with occupancy less than 50), a purchase order must be utilized (to ensure supplier has insurance coverage terms). Additionally, please ensure that the location follows the required fire code regulations and contact Risk Management to provide input on the appropriate insurance coverage needed **for that type of** venue.
- There may be "exceptions" **where a deposit** is required. If **a deposit** is required by an establishment, the event planner should contact their BSC/FTC to facilitate payment.
- A purchase order is always required for Hotel/facility events that includes rooms, catering, and bar service to protect Cornell with terms and conditions. Ensure the **deposit** invoice is submitted with the remainder of the required paperwork (i.e. contract, addendum, etc.)

3. Internal Cornell Items Required to Complete the Transaction

- Ensure the unit/**end user** only provides their initials, date initialed (and Net ID) in the margin of the hotel/facility contract. Please do not sign and send contract to the hotel/facility since the unit/end user does not have the authority to sign on behalf of Cornell (only Procurement Services is authorized to sign contracts on behalf of the university). Cornell does not have the opportunity to negotiate terms after **any** Cornell employee signs.
- Make sure the hotel/facility provides written details of the event (quote for food, bar, etc.) as well as terms and conditions.
- If you are renting a facility and hiring a bartender, be sure to obtain insurance from the bartending company.
- If it is a new hotel/facility which is not in the **Cornell vendor database**, be sure to obtain the W-9 and supplier information form, etc., as appropriate. **The W-9 should be sent to Procurement Services using a secure method if there is a social security number on the form.**