Class Event Planning
2014 – 2015 Guidelines

Cornell Class Programs
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Planning an event for your class may be one of the most rewarding tasks you do as a class officer. These guidelines are meant to help you plan a successful event by providing hints, suggestions, and a timeline to keep you on track. Remember that Class, Student and Young Alumni Program staff can be valuable partners in planning a memorable event.

**Tips for getting started**

- Begin planning for your event at least three months in advance.
- Appoint an events chair. This is a good role for a class vice president or class council member. Be sure to discuss expectations, including budget, timing, and action steps to make planning manageable.
- Communicate event plans to all class officers.
- Create a budget.
  - The class treasury should pay to publicize for an event, including mailings.
  - Consider charging a per person fee to cover the actual cost of the event.
- An event doesn’t have to be a major production. Picnics, receptions, or dinners at a classmate’s home may be just as effective and successful as a formal affair for hundreds of people.
- Be realistic in setting an attendance goal.
- Plan an event appropriate for your area of the country.
- Be creative, but don’t create extra work. Piggy-back class events with university-sponsored or club-sponsored events. Consider co-sponsoring an event with other classes of your era.
- Publicity should be simple but visually appealing. Publish the event on your class web page and/or your Facebook page.
- Determine if an e-mail invitation is the best approach to reaching your classmates, or if you should have printed invitations mailed. Plan for a three week production time for printed invitations.
- Follow up your original invitation with e-mails and phone calls to generate enthusiasm and attendance.
- Make sure your class correspondent has information about the event to publicize it in your class column in the *Cornell Alumni Magazine*. Class correspondents need a minimum of three months of advance notice.
What to expect from Class, Student & Young Alumni Programs

- Budget guidance
- Location and venue suggestions
- Help determining the population to receive the invitation
- Template designs
- Designing, printing and mailing/e-mailing your event invitation via CornellConnect.
- Adding your event to the University online calendar
- Setting up an online registration database via CornellConnect
- Signing the contract for all caterers and venues
- A “Cornell Cares” package of materials to hand out at your event. This includes Cornell nametags, an attendance sign-in sheet, and other Cornell-related materials. A pre-addressed 9”x12” envelope will be included to return any unused items and your attendance list. If possible, please remember to return unused supplies so they may be used for future class events.
- Coding the list of attendees for entry in the University database. This allows us to understand what events were held, and how many people attended. It also records statistics for Cornell Net Promoter Score (NPS) for engagement.

Event Chair Responsibilities:

- Securing a location
- Taking phone RSVPs for your event as needed if a CornellConnect registration is not used.
- Making arrangements with your caterer, venue, entertainment, etc.
When it is essential to work closely with your CSYAP Staff Contact

Although your class event is being managed and funded by the class, it is important to keep in mind that all class business is also Cornell business.

Certificates of Liability
Before contracting with any venue or caterer please consult with your staff contact to obtain a Certificate of Liability when necessary from that vendor, with Cornell listed as “additional insured”.

Signing Contracts
Purchases and other financial transactions made for class organizations are considered to be University business. It is important that these transactions be made in accordance with the applicable University policies and procedures. We will help you with this.

There may be a variety of goods and services, for which you choose to contract. This may include a contract with the owner of a venue or engaging a caterer. Executing the right contract protects you and your class from claims and accidents and is a good risk management technique. Also, the contract will spell out what you are paying for and how the product or service will be delivered. 

Never sign a contract, but review the terms & conditions. If you are in agreement, please ask your staff contact to initial it on your behalf and submit the contract for processing.

Collecting money on behalf of Cornell University
If you are collecting money for your event, it is easiest and best to collect the fees via credit card in a CornellConnect registration. You need to take into account the 3% credit card fee that is charged when using credit card payment. If you must take checks because of a paper mailing invitation or payment at the door, they should be sent to the CSYAP class contact for deposit into the class account. Checks should not be made out to the volunteer but to the Cornell Class of XXXX. If the class is paying for the event out of the class treasury, a purchase order or deposit for the vendor must be obtained. Again, contact your CSYAP staff member who will work with University Business Services (UBSC) to accomplish this.

Please remember that we cannot pay for a venue or caterer without a copy of their Certificate of Liability or a purchase order.
Timeline and Checklist

12 Weeks Prior to Your Event
- Review event concept, purpose and goals.
- Review budget and seek approval from your treasurer.
- Determine who will be responsible for planning and managing the event.

11 Weeks Prior to Your Event
- Determine date, time and audience.
- View the University calendar (www.alumni.cornell.edu) for university-sponsored events taking place at the same time. Are there conflicts with or opportunities to leverage other events?
- Determine theme/venue and reserve location. Inform all of your class officers.
- Send contracts (hotel, space, etc.) to CSYAP for review, approval and processing.
- Additional forms (W9, Vendor Form, ACH) may be required to pay the vendor if they are new in our system:
  - Obtain insurance certificate.
  - Send information to class correspondent so that it can be publicized in the class column.

10 Weeks Prior to Your Event
- Determine promotion of class event. Will an invitation be mailed or e-mailed?
- Finalize venue and caterer.
- Determine if your vendors accept VISA. If so, get an estimate for the charge and forward to your CSYAP staff contact who will arrange payment on the University Business Center Procurement Card. If the vendor does not accept VISA, contact your staff member to arrange for a purchase order.
- Write and send final printed text/design for invitation to your CSYAP staff contact.

9 Weeks Prior to Your Event
- Printed invitation design work completed by CSYAP (please allow more time for difficult designs).
- Arrange for food and beverage.
- Determine volunteer staffing needs for the event (set-up, greeters, registration table, remarks, etc.).
8 Weeks Prior to Your Event
- Confirm everything! Reservations; set-up arrangements; equipment; supplies & materials; contact facility staff to arrange and confirm your needs; have financial details in order.
- Final proof of printed mailing sent to volunteer.
- Approved proof (with signature) due back to CSYAP staff contact.

7 Weeks Prior to Your Event
- Printed mailing sent to printer by CSYAP staff contact. (Allow a few days for quick copy jobs; at least two weeks for offset printing jobs.)
- E-mail invitation text sent to your CSYAP staff contact.
- Your CSYAP contact will create your online registration database. It will automatically be loaded into your class website if you are using CornellConnect websites.

6 Weeks Prior to Your Event
- E-mail invitations get sent.
- Online registration goes live.
- Post event information on the class Facebook page.
- Printer delivers printed mailing to the mailing vendor. Allow 3-4 days for it to be processed and mailed.
- Advertise your event by posting the mailing on your class website.

5 Weeks Prior to Your Event
- Alumni receive mailing (assuming it is sent first class).

3 Weeks Prior to Your Event
- Continue with phone calls, e-mails, and final event planning details.

Week of Your Event
- Final guarantee number for event due to caterer. (Some may need a guarantee earlier. Please confirm this with your caterer.)
- Event implemented. Arrive early; allow time for set-up, introduce yourself to facility staff, bring pertinent information such as contracts, and your “Cornell Cares” package of materials.
- Have fun at your event!
1-2 Weeks Post Event

- Final event wrap up.
- Report back to CSYAP your attendance numbers and send the list of attendees to your staff contact.
- Send catering and venue invoices for payment, if not pre-paid on University credit card.
- Send attendees a short survey and thank you note; post on class website.
- Post photos on class website and Facebook page.
- Debrief with your committee to discuss ways to improve the process for the future—what worked well and what did not.
Birthday Party Events: Blow Out the Candles Together

- Partner with Class Programs to provide assistance with the process of planning regional 40th, 50th, and 60th birthday parties. Statistics of where classmates are living can be provided to you. Typically, the top eight major cities are: New York, Washington D.C., Miami, Los Angeles, Boston, San Francisco, Philadelphia, and Chicago. Review the Geographic Statistics located on the CACO website for your class. [www.alumni.cornell.edu/caco](http://www.alumni.cornell.edu/caco)
- Ask several classmates in the regions to host your birthday party.
- Partner with your CSYAP Program staff contact to send invitations.
- If you are planning multiple parties, consider sending one invitation to all classmates listing all of the events.

Travel program: See the World the Cornell Way

A personal desire to see the world in the company of friends is what kicked off the Class of 1944’s popular travel group, Club 44. Art and Dotty Kesten began the voyage many years ago by inviting a few of their classmates on a cruise with them. By booking their cruises with a minimum of ten members, each group member is offered a substantial pre-cruise discount in addition to an early enrollment bonus. Consider booking a class trip with the Cornell Alumni Association Travel program. They handle all the logistics so you are free to enjoy all aspects of your trip. Visit the CAA Travel website at alumni.cornell.edu/travel.

Homecoming and CALC Receptions and Dinners: We Gather Together

Many classes hold events around Homecoming and the Cornell Alumni Leadership Conference (CALC). One example is the Classes of 1951 through 1955 who come together to celebrate Homecoming. A volunteer begins coordinating the event by asking the presidents of each class if they want their class to participate in the reception. An invitation is created and mailed from Ithaca. Your staff contact creates one registration site for classmates to purchase their football tickets and register for their class dinner. The classes may have different reception plans, but all end up at a local restaurant for dinner and their traditional songfest!

Attractive Events: Efficient, Economical, and Entertaining!

Class events don’t have to be complicated or formal to be attractive to your classmates. One imaginative group of officers put together a holiday ice-skating party and even developed a way to promote paying class dues. Utilizing the open-skate time at an indoor public rink, they offered a reduced price for dues payers and set-up a dues paying table at the door to encourage people
to pay their class dues. To ensure that the event was well attended, they invited six other classes to join in, and they kept their costs low by utilizing email for invitations, and various Cornell event calendars, the class website, and Facebook page for publicity. Even if a few classmates didn’t feel like skating, the gathering where everyone collected afterwards made the event a social celebration that everyone could enjoy.

Guarantee Success: General Planning Tips

- Always contact CSYAP as soon as you are thinking about organizing an event.
- Concentrate on geographic areas that have the greatest number of classmates.
- Finding a classmate to coordinate is the hardest part. When and where there is a volunteer—go for it!
- Divide and conquer. Delegate responsibilities to those who volunteer. Don’t take it all on yourself.

Mailings and Postage: Efficient and Timely are Key

Your Class, Student and Young Alumni Program contact will be happy to help you with all of your printing and mailing needs. We will oversee the entire process to ensure that your mailing is completed accurately and promptly. Your staff contact will also be happy to help you determine the best mailing area to which to mail. All charges for printing and postage will be charged directly to your class account. Please note there will be no charge for design.

First Class Postage

Although this is the most expensive option, we recommend that you mail first class if possible. Delivery is faster and more reliable. Undeliverable first class mail is returned to the sender and we receive updated address information when available.

Non-profit Third Class Mailing

Third class is less expensive than first class; however delivery can take up to 4 weeks. The post office places non-profit mail in a bin and puts it to the side until they are available to circulate it back into daily mail delivery. This happens within a 4 week timeframe. This is not an ideal option for any event. In order to utilize this option, the following requirements must be met.

- Minimum of 200 pieces or 50 pounds of mail.
- Address labels must be in zip code sequence.
- Contents must be Cornell or Cornell-related material and cannot have the character of
personal correspondence.

- Each piece must be printed or metered with the nonprofit bulk imprint.
- A Cornell campus return address must be used.

**Email Mailings**

Email is free! Please allow up to one week for staff to process an email request.

**Online Registration: Making it Easy**

Alumni Affairs and Development has a very user-friendly program to do online registration for your class events. Your CSYAP contact will help you set up your online registration database prior to your invitation being mailed. If your class is using CornellConnect websites then the online registration information will automatically appear on your class website. If you are not using the CornellConnect site, please be sure to ask your staff member for the URL to add to your class site so classmates can find it by clicking on the link.

**Seeking Reimbursement: Following the Rules**

To receive a reimbursement from the class treasury for event expenses that you paid for, please follow these steps:

1. Secure approval from your class president or treasurer.
2. Have the treasurer submit a signed payment authorization form (or an email stating approval to charge the class treasury) to your CSYA staff contact. (See Appendix for payment authorization form. Feel free to make additional copies.)
3. Submit original receipts, not copies.
4. Provide an explanation of what the expense was for (purpose.) If it was for an event or dinner, please supply a list of attendees.

Allow two weeks for processing after we receive all of the paperwork.
Risk Management: Safety is Important

Prepare in advance. Make sure that walkways, steps, and handrails are in good repair and free of litter, ice, and snow. Flag changes of level in walking surfaces, both indoors and out, with markers such as reflective tape, contrasting paint, and signs.

Consider the human element. Advise guests in advance that an event may involve walking, so they can wear appropriate shoes. During an event provide guests with clear walking directions, both verbal and written. When serving alcoholic beverages, serve substantial food; and stop serving alcohol an hour before guests leave.

Reflect afterwards. Learn from your experiences. Debrief with event staff on potential or actual problems, then work to correct the problems for next time.

Checklist of Significant Risk Factors. The first step in the planning process is to evaluate the risks involved in your activities. Below is a list of possible risks to consider.

- Sale and consumption of alcohol
- Admission of bottles and cans
- Size of crowd
- Poor communication system
- Poor signage (exits, etc.)
- Slippery surfaces
- Weather conditions: heat, cold, snow, rain, wind
- Event cancellation or performer no-show
- Use of locations not designed for events
- Over-capacity crowds
- Event-related controversies
- Insufficient budgets
- Free and uncontrolled admission
- Poor ventilation
- Slow emergency response
- One-of-a-kind and first-time events
- Use of contractors (food, entertainment, etc.)
- Loaned or rented equipment? (Have insurance in place)
- Safe food handling.
- No Insurance coverage.
# Class, Student, and Young Alumni Programs Contact List

<table>
<thead>
<tr>
<th>Role</th>
<th>Staff Contact</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Senior Director of Class, Student, and Young Alumni Programs</td>
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<tr>
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<td>607-255-3053</td>
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<tr>
<td>Senior Associate Director, Reunion Programs</td>
<td>Cathy Hogan '70</td>
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<td>Director, Diversity Alumni Programs</td>
<td>Matthew Carcella</td>
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<td>Class Assignments</td>
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<td>607-255-2254</td>
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<td>1945 - 1954</td>
<td>Lauren Coffey</td>
<td><a href="mailto:Lauren.Coffey@cornell.edu">Lauren.Coffey@cornell.edu</a></td>
<td>607-255-6582</td>
</tr>
<tr>
<td>1955 - 1964</td>
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<td>607-255-8821</td>
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<tr>
<td>1965 - 1974</td>
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<td>607-255-4850</td>
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<tr>
<td>1975 - 1984</td>
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<td>607-255-3053</td>
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<tr>
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<td>607-255-7919</td>
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<tr>
<td>1995 - 2004</td>
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<td><a href="mailto:Amanda.Massa@cornell.edu">Amanda.Massa@cornell.edu</a></td>
<td>607-254-7176</td>
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<tr>
<td>2005-2014</td>
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<td>607-255-8266</td>
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<tr>
<td>2015 - 2018</td>
<td>Corey Earle '07</td>
<td><a href="mailto:Corey.Earle@cornell.edu">Corey.Earle@cornell.edu</a></td>
<td>607-255-3516</td>
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<tr>
<td>Reunion Assignments</td>
<td>Erin Kennedy</td>
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<td>607-255-2254</td>
</tr>
<tr>
<td>70th, 75th ('45, '40)</td>
<td>Lauren Coffey</td>
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<td>607-255-6582</td>
</tr>
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<td>60th, 65th ('55, '50)</td>
<td>Katie Freyer</td>
<td><a href="mailto:Katie.Freyer@cornell.edu">Katie.Freyer@cornell.edu</a></td>
<td>607-255-8821</td>
</tr>
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<td>50th, 55th ('65, '60)</td>
<td>Lauren Morgenstern</td>
<td><a href="mailto:Lauren.Morgenstern@cornell.edu">Lauren.Morgenstern@cornell.edu</a></td>
<td>607-255-4850</td>
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<tr>
<td>30th, 35th ('85, '80)</td>
<td>Teri Baier</td>
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<td>607-255-3053</td>
</tr>
<tr>
<td>15th, 20th, 25th ('00, '95, '90)</td>
<td>Beth Walkenbach '00</td>
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<td>607-255-7919</td>
</tr>
<tr>
<td>5th, 10th ('10, '05)</td>
<td>Cathy Hogan '70</td>
<td><a href="mailto:Cathy.Hogan@cornell.edu">Cathy.Hogan@cornell.edu</a></td>
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<td>Reunion Zero ('15)</td>
<td>Amanda Massa</td>
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<td>Diversity Groups - CBAA, CLAA</td>
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<td>607-255-4173</td>
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<td>Continuous Reunion Club (CRC), Non-Reunion Year (NRY)</td>
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<td>607-255-7085</td>
</tr>
<tr>
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<td>Erin Kennedy</td>
<td><a href="mailto:Erin.Kennedy@cornell.edu">Erin.Kennedy@cornell.edu</a></td>
<td>607-255-2254</td>
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<tr>
<td>Class Programs</td>
<td>Laura Sitzman</td>
<td><a href="mailto:Laura.Sitzman@cornell.edu">Laura.Sitzman@cornell.edu</a></td>
<td>607-255-7085</td>
</tr>
<tr>
<td>Reunion Programs</td>
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<td><a href="mailto:Francine.Darling@cornell.edu">Francine.Darling@cornell.edu</a></td>
<td>607-254-7147</td>
</tr>
<tr>
<td>Student and Young Alumni</td>
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<td>607-254-1218</td>
</tr>
</tbody>
</table>

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Class Event Budget Worksheet

Class of _______

Total # Classmates Invited _________  Total # Classmates Expected _________

Actual Total Attendance _____________

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<th>Budget</th>
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<tr>
<td><strong>Fixed Costs (Total $ amounts)</strong></td>
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<td>Invitation postage</td>
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<td>Invitation labor</td>
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<tr>
<td>Venue</td>
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<td>Souvenirs/giveaways</td>
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<td>Miscellaneous rentals</td>
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<td>Other:</td>
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<td>Other:</td>
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<tr>
<td>Budget cushion</td>
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**Total Fixed Costs**

**Fixed Costs per Person**

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<th>Budget</th>
<th>Actual</th>
<th>Variance</th>
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<tr>
<td><strong>Variable Costs (individual $ amounts)</strong></td>
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<tr>
<td>Caterer (per person)</td>
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<td>Other:</td>
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Fixed cost per person

Variable cost per person

**TOTAL COST PER PERSON**
Event Function Worksheet

Class: ___________       Host/Hostess: ________________________________________________

Event Name: ________________________________________________________________

Date and Time of Event: _______________________________________________________

Estimated Attendance: ____________

Location/Venue: ______________________________________________________________

Capacity: __________________________

Catering

Name of Caterer: ______________________________________________________________

Telephone/Email contact: _____________________________________________________

Set up Time: __________________       Breakdown Time: _________________________

☐ Cash Bar       ☐ Hosted Bar

☐ Buffet Meal       ☐ Sit down meal       ☐ hors d’oeuvres only

Entertainment/Speaker

Name of Entertainment or Speaker: _____________________________________________

Time Arriving: __________________

Special Equipment/AV needed: ________________________________________________

__________________________________________________________

Additional Instructions/Information
Working with a Caterer

The following checklist was compiled with the help of Kurt Brown, Director of Catering, Boston Marriott Copley Place, 110 Huntington Ave., Boston, MA 02116

Determining needs
- What is the nature of the event (awards ceremony, business meeting, fund-raiser, gala dinner, etc.), and what is its objective?
- Who is your audience; classmates, high level donors, a particular group from a region?
- Is the function part of a meeting, or is it a stand-alone event?
- How many people are expected to attend?
- Is this a first-time event? If not, use data from previous functions to help determine numbers.
- Where and how will the event be catered (on- or off-site, using a hotel’s catering department or an outside caterer)?
- If the event will be held off-site, are there adequate cooking and food-preparation facilities, including freezers, refrigerators and running water?
- How much time is needed to set up décor, A/V or exhibits?
- Does the site have adequate general storage and load-in/load-out access?
- Will any VIPs be present?
- Will the event have a theme?
- Will there be live entertainment?
- Will alcohol be served?
- What is the budget?

Menu Planning
- Begin planning as far out as possible. Last-minute planning can result in higher food and labor costs.
- Give the caterer details of the event, including number of expected attendees, date, time and location.
- If using an outside facility, arrange for the caterer to site-inspect the venue and kitchen facilities.
- Address food allergies, vegetarian requests and any particular ethnic or religious preferences. (A general rule of thumb: About 5 percent of attendees request vegetarian dishes.)
- Discuss with the caterer any dishes that were not successful in the past. Provide a list of clients’ preferred foods and items to avoid.
- Determine whether a buffet-style or plated meal would be more conducive to the nature of the event.
- If considering a buffet, ask for a selection of foods that stay fresh and hold up well. Avoid fried foods, sliced meats and breakfast items such as scrambled eggs, which dry out quickly.
- Consider whether food will be prepared on-site or made in advance and then transported to the event. Some types of fish, such as sole and flounder, do not hold up well if prepared ahead of time.
- Discuss how food will be transported if it is being prepared off-site.
- Discuss cleanup procedures. If catering staff will handle the cleanup, ask if an extra fee applies.
- Before committing to a final menu selection, ask the caterer for an actual tasting. If this is impossible, ask to see a photo portfolio of dishes the caterer is comfortable preparing.
- If planning to serve alcohol, ask the caterer for consumption guidelines and to recommend wines within budget.

**Negotiations and Details**
- Inspect the caterer’s facility. Cleanliness is a good standard by which to judge professionalism.
- Ask to see the caterer’s business license as well as health-department certification; reputable firms should have both.
- Ask if the use of silverware and linens is included in the quoted price.
- Determine the number of wait staff necessary. If a certain caliber of staff is needed, the caterer should be made aware of this.
- Ask outside caterers for at least three references, and check them before signing a contract.
- Provide a final head count to the catering department 48 hours before the event. Review your contract as this time limit may vary with your caterer.
- Ask about the Certificate of Insurance.
Big Red Sporting Events Planning

Pre-game and post-game parties are a fun, easy, and economical way to bring classmates together not only in Ithaca, but wherever the Big Red plays. Classes have been organizing these get-togethers for years and each one is as unique as the class! There are five major decisions to be made:

**Decision #1: Who is the event leader?**
This person handles all the details and questions about the event from your classmates and collaborates with any other local Cornell event organizers. This includes timely reporting of information for promoting your event via the internet and mailings.

**Decision #2: What is the scope of event and should you go it alone or collaborate?**
What kind of event do you wish to hold, how much can you spend, and how much help do you need? There are many options, but mainly three approaches to consider:
1) **Class-specific event** – the class handles all aspects – mailings, RSVPs, confirmations, food ordering, parking reservations if applicable, handling ticket orders, etc.
2) **Joint event with other classes** – costs and volunteer efforts for all aspects of the event are shared across classes. Larger attendance is possible when partnering with other classes. Contact the classes you wish to collaborate with to determine their interest. Your Class, Student and Young Alumni Program staff contact may have some information on other class’ plans. Be sure to agree on a timeline and division of responsibilities early-on.
3) **Piggy-back on a local Cornell Club event** – shared volunteer time for all aspects of event planning, but may not need to handle ticket or food orders if club handles this, publicity in each organization’s mailings, and much broader attendance. Club annual newsletters are sent in July or August, so all details need to be in place well in advance for publicity purposes.

**Decision #3: Who and how to invite your class?**
Depending on the venue, you may want to consider inviting classmates from just the local area or from a wider regional area. The more people that are invited, the more attendees you may have. Once you have a group in mind that you want to invite, your contact in Class, Student and Young Alumni Programs can assist you in creating and mailing a postcard or flyer. When creating your invitation, please keep in mind that it takes approximately three weeks to produce a mailing.
Mailings should be sent at least six weeks in advance of your event in order to give your classmates enough time to make plans and RSVP if necessary.

**Decision #4: What is your location?**

If your event will include a pre-game tailgate or post-game reception, you will need to decide where to hold the event. The office of Alumni Affairs has invested in making Homecoming Weekend a large all-inclusive festival that includes a pre and post-game tailgate party for everyone, beer garden tent, games, rides, fireworks and a concert. We are encouraging classes and clubs to join in the festivities and participate in the all-inclusive tailgating. We want everyone to be a part of this fantastic Cornell event!

For away Big Red athletic games, contact the home team’s athletic ticket office and inquire as to their tailgate parking areas, permits, and even in-door locations for rent. For post-game receptions, you might consider a venue within walking distance of the athletic facility or a classmate’s home.

**Decision #5: What is the menu?**

Many classes have found it helpful to ask local classmates or fellow officers to organize the food and beverage part of their pre-game or post-game reception. If local vendors are going to be used, remember to place your order well in advance and confirm your arrangements as the event approaches. If you are trying to keep expenses to a minimum, consider a potluck-style tailgate and ask your classmates to bring food and beverages to share. **If you will be submitting receipts for expenses incurred, be sure to keep the originals and get approval from your class treasurer and send them to your staff contact.** All expenses must be approved by your class treasurer ahead of time and he/she or the staff contact can submit them to the University Business Services Center (USBC) for reimbursement.

**Tips from the Professionals**

Terry Oosterom’82 has been organizing Homecoming tailgates for her class and the Glee Club for years. She provided several tips to make your tailgate a success:

1. Keep it simple. Don’t try to over-do the food. If you are grilling, bring foods that will cook quickly, prepare as much food as possible at home and bring it already made to the game. If budget is an issue, ask classmates to bring something to share.

2. Arrive early. Purchased permits so you are guaranteed a spot.
3. Bring your class banner to help identify your group (your CSYAP contact can order your class a waterproof banner if you don’t have one). You can also display balloons for easy recognition by your classmates.

4. Pack up everything just before the game. Put everything into your vehicle and bring it back out during half time and after the game. Most food consumption happens after the game.

It is imperative that you begin the planning process for all Big Red athletic games and tailgates early if you wish to have CSYAP assist with event mailings. If you start planning early enough, you can set up a season full of pre-game and post-game events for both home and away games. You can then use your class Facebook page, website, event mailings, and emails to advertise these events. In addition to enhancing class participation and communication, these social events can be a tremendous source of exciting news for your class column, and fun photographs for your class website. Once you begin the tradition, it is easy to keep it going, and you will likely find that your classmates look forward to your gatherings year after year.
Purchasing and Event Guidelines

Classes are required to follow University Policy 205 for purchases. Your CSYAP contact will provide information on these guidelines. When you are beginning to make plans for an event or have purchases to make, check with your staff contact first to ensure a payment plan is in place before a commitment is made with a vendor or an individual. Compliance with the Purchasing policies reduces the level of legal and other risk issues for the University and you by establishing terms and conditions prior to shipment of goods and/or initiation of services. CSYAP will coordinate the necessary information with the Purchasing Agent for your orders. Allow plenty of time. Please review the following guidelines on the University website: http://www.purchasing.cornell.edu/

**Purchases** Less than $500: (Example: Reunion decorations, flowers)
If your purchase is less than $500 and your vendor accepts VISA, use the university Procurement Card to make payment by working with your CSYAP staff to coordinate this transaction. You can also pay with your own funds and request a reimbursement later by submitting the original receipt(s) (not copies) showing the detail of each purchase.

**Purchases** Over $500: If the vendor accepts VISA, get a contact number, estimate for the charge and forward to your CSYAP staff contact. The University Business Center will pay on their high level procurement card. The limit is $10,000. If the vendor does not accept VISA, we will need an invoice. If the vendor is new to doing business with Cornell, they will need to complete a W9, ACH and Vendor Supply Form. Examples include:

- Advertising
- Ambulance service
- Beverages
- Books, magazines and periodical subscriptions
- Buses, chartered
- Consulting agreements
- Entertainment (an entertainment contract will also need to be signed)
- Food, catered (up to $10,000)
- Film rentals
- Freight Bills for outbound freight
- Mail services (excluding postage)
- Postage (can be paid by invoice at any dollar limit)
- Rental Vehicles (local rentals may require a purchase order.)
- Seminars and Convention Registration fees

If your vendor does not accept VISA, if your order is over $500 or if your item is not on the above list **we will need to issue a purchase order through the Purchasing Department.**

**To get a purchase order for your vendor:**

- Contact CSYAP as soon as you have decided what you would like to order. We will work with you. We will need the specifications of what you want to order: quantity, size, color, price per item, shipping instructions, along with the vendor name, address, phone & Federal ID #. All catered food requires a purchase order.
- The Purchasing Department will send the purchase order directly to your vendor. It can be faxed if necessary. Orders should **not** be placed directly by you with the vendor. The purchase order establishes the order and makes the commitment with the vendor.
- Allow extra time if you plan to use special artwork. We must get prior approval for any Cornell logo designs you may want to use.

**Orders costing more than $10,000**

- For orders costing more than $10,000 and you do not chose one of the vendors from the Cornell list of preferred vendors, you are required to get at least three competitive bids. The University will do this for us. We can request that the Purchasing agent include a vendor of your choice in the process.
- Orders costing more than $20,000 require the Purchasing Agent to do a formal bid process. The agent must send RFPs (request for proposals) to a minimum of five vendors.
- Occasionally there may be only one vendor who can provide the goods or services. We require and must provide special documentation to explain this. The reason must be a valid business reason. In this case the vendor is called a "sole source vendor."
- In summary, if you need to order something that totals over $10,000, contact your CSYAP contact as soon as possible. We will work with you on the bidding requirements and start the process with Purchasing. Requests for Proposals and bid results can take up to one month to process so please allow plenty of time.
Events

- Events essentially follow the same guidelines as purchases.
- Use the University Procurement Card (VISA) to make payment by having your CSYAP contact make payment for you—over the phone directly to your vendor, for items under $500 when possible.
- If your vendor does not take VISA or the order is above $500, we will need to make arrangements for a purchase order.
- Contact us as soon as possible so we can get the purchase order in place well ahead of your event to avoid delays in payment.
- Remember the $10,000 rules for bid requirements.

*Your understanding and support of this University policy is essential to the efficient processing of our work. Orders placed directly with vendors or billed on invoices that do not follow the above guidelines will be viewed as “unauthorized purchases” and are subject to audit review.*
PAYMENT AUTHORIZATION FORM

TO: Cornell University
Office of Alumni Affairs
Class Programs
130 East Seneca Street, Suite 400
Ithaca, New York 14850

FROM: ________________________________
CLASS OF: ________________
President/Treasurer

Date ________________________

This payment order requests you to debit our Class account, G65________________________, and make the following payment:

Amount: $______________________________

Check payable to: ________________________________

Fed ID# ________________________________
(if business)

Mail check to: ________________________________
(Addressee)
(Street Address)
(City, State, Zip)

Attention: ________________________________

Description: ________________________________
(Invoice #, etc.)

Signature of Class President/Treasurer: ________________________________

Keep a copy of the Payment Authorization Form and back up for your records. Send the original form to the address above and attach the original invoice or original receipts (not copies) for payment processing. Allow 10 days to 2 weeks for processing.