

ACADEMY FOR LIFELONG LEARNING OF CAPE COD, INC.

POLICIES, RESPONSIBILITIES AND PROCEDURES

Section: Committees

Date Approved:

Initials: RBS,NC

Subsection: Special Events

Revision Date: 11/02/08

On and Off Campus Applications

3/20/09,6/20/17,12/13/24 DT

POLICY

Bylaw Reference: Article V, Section 9.

The Special Events Committee Chairperson shall be appointed by the President of the Corporation for a term of one year.

The Special events Committee shall plan and arrange special activities such as day trips and other special events, including social activities.

RESPONSIBILITIES

- 1. Appoint a Committee of interested members to help carry out special and social events throughout the year. Discuss planned and suggested events with the Committee.**
- 2. Plan for diverse social activities and events to appeal to the broad interests of the Members, consistent with Annual Long Range organization goals and budget.**
- 3. Via monthly reports, presents a schedule of planned events to the Board of Directors for approval early in the appointed year and as individual ideas are developed.**
- 4. Consider: trip planning; bus arrangements; contracts for sites of events; trip and/or event costs; money collection, refunds and wait lists; minimum and/or maximum numbers of members needed or allowed; procedures for cancellations; and the promotion of events as appropriate to the type of event.**
- 5. Design events on a “break even” basis.**
- 6. Schedule all events and reserve space as early as possible for both off-campus and on-campus events. The office Administrator reserves all on-campus events.**
- 7. Confer with the Hospitality Chairperson as opportunities arrive to assist and/or collaborate on ventures.**
- 8. The Special Events Chairperson should receive notification of ALL events in order to avoid conflicts with other special events.**

PROCEDURES---- SPECIAL EVENTS ON AND OFF CAMPUS

1. **The Academy for Lifelong Learning of Cape Cod, Inc. (ALL) encourages and supports Special Events. These events are to provide social settings and intellectual stimulation for our Members. Some scheduled events have included Fall Mixer, theatre events, museum visits and lectures, etc. All events and information must be informally approved by the Board of Directors of the Corporation.**
2. **It is further understood that from time to time, individual Coordinators may deem it necessary or advantageous to establish field trips directly related to offered courses. Trips to theaters, cities, etc. both on and off of the campus, fall into this category. The Academy supports and encourages these field trips since they enhance the resultant success of the courses. The Special Events Committee provides advice if requested.**
3. **It is the aim of the Board of Directors that the following procedures be utilized for each special event to which they apply. Embodied in this procedural policy is the need for these Special Events to be fiscally self-supporting.**
 - a. **Receipts and Disbursement of Money---All general money transactions are to be handled through the Treasurer. For advance payments, the event leader is to use the ALL Disbursement Form, indicating the reason for the funds needed, the amount of funds needed, the purpose for which the funds will be used, and to whom the check is to be issued. Once completed, it is then to be given to the Treasurer for review and payment.**
 - b. **When requesting a check for expenses to pay for advanced purchasing or services, a receipt for the goods and services purchased along with any funds not used is to be given to the Treasurer at the ALL office within one month. A receipt for funds not used will be issued.**
 - c. **When submitting expenses paid on the ALL Disbursement Form, written receipts must be presented.**
 - d. **Chair requests for items or services greater than \$50 must be approved by the Board unless the expenses are a line item on the budget or already approved. Disbursement of funds over \$500 requires the signature of two officers (the President, Vice-President or Treasurer).**
 - e. **Trip Planning The Special Events Chairperson should notify the Board of regarding any intent to conduct a trip. The Board of Directors will evaluate the proposal request along with any special requests and then approve or deny the proposal.**
 - f. **Bus Arrangements----- The Chairperson will arrange for a contract with a bus company. Once that has been completed, the**

Chairperson will complete an ALL Disbursement Form and submit it to the Treasurer of ALL who will issue a check to the Chairperson to be sent to the bus company. This form is available from the Treasurer.

- 1) Gratuity arrangements included in the member payment for the trip should be listed separately on the ALL Disbursement Form with a request for a separate check payable to the event coordinator to cash in order to pay the bus driver upon completion of the trip.
- 2) If there are any other arrangements made to be included in the cost of the trip, (such as food plans, etc.), the event coordinator should discuss the situation with the Treasurer and make special arrangements for payment.
- 3) When the Special Event Chairperson has secured a contract for the bus and all other arrangements have been made, the event coordinator will notify the expected participants of the total cost specifying what the costs include and instruct them to write their checks payable to ALL.

g. Once the bus line has quoted the cost, the per person cost should be determined by dividing the cost of the bus by the anticipated number of participants---for example 40 (40).

To this add two dollars (\$2) per person gratuity.

Example: Cost of bus \$1,000.00.

Divide by 40 to yield \$25.00 per person.

Add \$2.00 gratuity for bus total of \$27.00 per person.

Gratuity money should be given directly to the bus driver at the trip's conclusion by the event leader.

4. Other Trip Costs-----Once the event leader has determined all other costs such as: entrance fees, theater tickets, lunch (if included), and other costs, he or she should add these costs to the bus cost to reach the final cost per person.
5. Money Collection-----All events should be planned so that all monies will be in the hands of the event leader no later than ten (10) days before the actual event. At the time, the trip may be cancelled if the number of participants is not sufficient to cause the event to break even. All checks are to be made out to ALL and will be given to the Treasurer of ALL when the event leader sets the final ok for the trip.

6. **Refunds and Wait Lists**-----When an individual finds it necessary to cancel out of an event and request a refund, the refund will be granted only under the following scenarios:
- a. If the request is received at least ten days (10) before the event.
 - b. In extenuating circumstances, the event leader must obtain the approval of the President of the Corporation.
 - c. If there is a waiting list for the event, the requesting-refund member may ask for names on the waiting list and follow through themselves with exchange of money and ticket for the event between the refund requester and the agreeing person on the waiting list. The refund-requester is to be told that the exchange is to be reported to the event leader. The replacement must comply with all trip requirements. If no replacement is found, no refund will be given if not within the ten (10) day limit.

Please note that each event leader is to maintain a wait list of people desiring to join the event. This list will be used as cancellations occur.

7. **Medical Information**-----It is recommended that a reminder be pre-printed on all trip applications that the participant carry the Medical Information Card with him/herself to be used only in the case of an emergency if treatment is needed on any ALL sponsored events.
8. **Promotion of Events and Social Occasions**-----It is recommended that all ALL events be promoted by “Flyers”, applications to be handed out in class, posters displayed on the bulletin board in the office area and published on the ALL website if timely for the event.
9. **“Meet and Greet Mixer”**-----Responsibility for this event lies with the Hospitality Committee; however, Special Events cooperates with the Hospitality Chairperson in coordinating this activity, if requested. Any supplies purchased are to be processed through the Treasurer, using the ALL Disbursement Form. Although Hospitality generally plans the program, refreshments, and extends the invitations, Special Events assists as needed in coordinating this mixer.
10. **Early Planning**-----It cannot be stressed enough that early planning is important for scheduling events. There is great competition for space at the CCCC by its departments and other affiliates, and also with other organizations competing for space at popular places. In some cases, reserving space at CCCC one year in advance is advised.

Summary

The examples above are models for event planning. The main considerations in planning varied events and trips include time frames; contracts or reservations for both on and off-site events, bus arrangements; understanding the payment process; determining event costs; money collection; refunds; cancellations; and wait lists. In addition, it is necessary to determine numbers of members, needed or allowed, in order to establish break-even situations. It is important as well, that all applications contain the notation of the importance of carrying the medical information card, and that varied promotional details are to members.

Steps for planning an event for ALL

- 1. The designated Events Committee person is to email the ALL Office Administrator at lifelonglearning@capecod.org to request a room/venue for a planned event that is to take place at the 4C's West Barnstable or Hyannis location. The email request needs to include the date, time, what room is to be requested and any special room set-up requests for the event (e.g. seating, podium, tables, etc.). Once the request for a room/venue is received, the Office Administrator completes the online Event Request form and submits it to be processed by Facilities Use Coordinator. Once the form is submitted, a room reservation confirmation will be emailed to the ALL office and forwarded to the original requestor. If the room is unavailable on the requested date/time, alternative room choices will be given to the Office Administrator.**
- 2. Requests for furniture, seating, etc. are to be input into 4C's CAMIS software two weeks prior to the event by Office Administrator.**
- 3. Requests for audio visual technology and wireless or wired microphones should be specified in the original email request and are also to be emailed to the 4C's Help Desk (helpdesk@capecod.edu). Requests for technology must be made two weeks prior to the event.**
- 4. If catering is needed for an event, the Office Administrator will contact the college catering company. The catering service is not part of 4C's, therefore we pay them directly. Always plan to have water available for speakers.**

P&P Committee Review Dates and Initials: 5/21/07 L.D.; 07/09/07 L.J.;11/02/08 L.J; 03/20/09 N.C.: Revised 6/28/17 LRM, 12/13/24 DT

INTERNAL FACILITIES/EVENT REQUEST PROCESS

