

**Florida Atlantic University
Office of the President**

**Special Event Planning and University Protocol
Standards and Guidelines
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INTRODUCTION

Florida Atlantic University has seven campuses stretching 140 miles along Southeast Florida coastline. Every day members of the faculty, staff, and student body organize programs and events. These events often provide people with a first impression of FAU and should be handled with professionalism. To assist members of the university community who are charged with planning special events and programs on behalf of the university, this protocol manual has been prepared to provide guidance and instruction on event scheduling and planning, invitations, guest lists, and publicity. Also included is information on event logistics, protocol and guest relations. In addition, there are several charts with useful information and contacts.

The intent of this policy manual is to help support university wide efforts so that a unified image for FAU can be achieved. By following the suggestions contained herein, special event planners will make the most effective use of the President's time and participation at university events. The audience, program and venue make each event unique and special. Providing direction on routine elements behind university-wide events will allow organizers to focus on the key components of their programs and their impact on the institution's overall image and mission.

Comments, suggestions, and topics for further consideration should be forwarded to my office. Your input is appreciated and valued.

Thank you,

Jennifer O'Flannery

Jennifer O'Flannery
Chief of Staff
Director of Board Operations
Florida Atlantic University
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PLANNING AND SCHEDULING

Purpose of Event

The first step when planning a university event is to define your objectives and set the goals and outcomes you expect to achieve as a result of the event. It is important to determine which of the university's key priorities and messages your event will complement.

Ask questions. Is this event the best way to achieve your goals? Do you have the necessary financial and human resources needed to carry out the event successfully? Is this a one-time event or an annual event?

When determining the date and time for your event, find out what other events are taking place on your campus and in the community. Make certain ample parking is available at or near the event site. Be sure that guests know where the event is taking place and how to get to the location. Distribute information in a timely manner. Plan a program that is unique, inspirational and reflective of FAU's mission.

Budget and Funding

Before scheduling an event, requesting the presence of the President and/or other officials, you must have the funding sources for the event established. You should follow any requirements of the university and/or the FAU Foundation, Inc. When submitting your request, be certain to include information on how the event is being funded.

Scheduling the President

If you would like the President to participate in the event, the President's office must schedule the event on his/her calendar. Before reserving meeting space, sending out invitations, or contracting any services, the event should be reviewed to determine the President's availability and confirmed on the President's calendar. Remember that the President's schedule is subject to change and even when things are confirmed in advance, there are circumstances that necessitate cancellations and changes. Also, requests for the President's participation should be communicated with the appropriate vice president, dean and director's office. If your request for the President's participation includes reserving the president's home, please see specific information regarding the Baldwin House below.

Steps for scheduling the President:

1. Define the purpose (s) and objective (s) of the event
2. Confirm source and amount of funding needed
3. Create invitation list
4. Determine program and role of the President
5. Contact the President's senior administrative assistant to determine availability
6. Send confirmation to President's office with informational materials
7. Keep president's office updated on the progress of the event plan

Scheduling and Inviting Trustees

Communication with members of the Board of Trustees is handled through the Chief of Staff and Director of Board Operations. Invitations to Board members will be extended by the director on behalf of event organizers and must be coordinated through the Board office.

1. Follow the same steps to schedule the President. The President should be present when trustees are invited.
2. Prepare invitations for members of the Board of Trustees and send event information to the Board director's office. This office will distribute invitations to the Board and make any necessary follow-up contacts.

Scheduling and Inviting Elected Officials

Inviting elected officials and other important dignitaries to FAU brings the university exposure. By doing so, FAU expands its reach into the community and interests people in attending. Remember that the President should be the person extending the invitation to the official. If you would like to have a dignitary or elected official participate in an event you should do the following:

1. Follow the steps to schedule the President at your event. Whenever possible, the President should be in attendance when elected officials and dignitaries are visiting FAU.
2. Send an appropriate communication to the official inviting them to participate in the event. Provide as much detailed information as possible, including a contact person and phone number.
3. If you are sending invitations to all elected officials, please notify the President's office that you wish to do so and work through the office of Government Relations.
4. As the event approaches, please report the names of the officials who have replied to the President's office.

The Baldwin House

The Baldwin House is an event and reception facility as well as private residence for the President and first family. The house provides a gracious and hospitable setting for celebrating special university achievements. Events held here center around gatherings for faculty, students and alumni, recognition ceremonies for donors, celebrations of academic milestones, and tributes to volunteers.

The President and/or spouse are the hosts of any Baldwin House event. In certain instances, when the President is unable to attend, he or she may appoint a member of his/her executive staff to represent him/her. The President may co-host an event with another vice president, dean, or representative from a university-affiliated or community organization. The President is always listed first as a co-host as the facility is his/her residence.

The Baldwin House is not a rental facility; it is a special residence where people are invited as guests of the president and the University. Except in rare cases approved by the President, tickets are not sold for Baldwin House events nor are guests asked to pay to attend an event.

The responsibility of paying for events at the Baldwin House rests with the organizing department or group. While the president or spouse may host an event, it primarily benefits a particular college or department, and that college or department will be responsible for the costs. The fiscal responsibility for each event will be determined as the event is being scheduled on the President's calendar.

Reserving the Baldwin House begins with completing the request form at <http://www.fau.edu/president/baldwin/reserving.php> at least two months before your desired event date; however, it is wise to begin scheduling events involving the President four or more months beforehand.

Before requesting to use the Baldwin House, be certain that your event organizer has first cleared the request through the appropriate dean, director and vice president. Once the request has been submitted, the director of the Baldwin House will contact you to discuss specific event goals and objectives. Depending on the complexity of the event, each request will be reviewed by the President and spouse, the President's staff and the Vice President for University Advancement.

The director of the Baldwin House will work with the President's office to schedule his calendar and schedule a meeting with the department's event organizer to review invitation wording, the draft guest list and coordinate details such as catering, rentals, parking and security. Invitations should never be printed until after this initial meeting.

The Baldwin House website <http://wise.fau.edu/president/baldwin/> also contains document templates designed to help you organize and prepare your event documents.

Additional Campus Meeting Facilities

Florida Atlantic University is fortunate to have seven beautiful campuses housing many interesting buildings. You are encouraged to use a variety of the university's meeting facilities to highlight the university and make your event as memorable and meaningful as possible.

Listed on the university's Space Utilization website is a database that allows you to search by building type or by type of use for special events, lectures, and meetings. Exploring and using these reports will give you a better idea of the variety of appropriate spaces available for events.

<http://uavp.fau.edu/SpaceFile/reports.asp>.

Any space should be reserved through the building's designated representative. The use of the space should follow the university's guidelines and policies for using university property as indicated in Presidential Memorandum #60.

<http://www.fau.edu/admin/pm/60.html>

INVITATIONS

Guest List Development

Once the purpose of your event has been determined, develop a guest list that comprehensively reflects your audience. There is no magic formula or super database that can just print out a perfect guest list. A perfect guest list is the result of research, collaboration, and thoughtfulness, all backed up with good data and information.

Establish a small group of people who are familiar with your department, the purpose of your event, and the audiences you hope to reach to serve as informal advisors. Begin by identifying the groups of people you wish to invite. Meet with officials in university advancement to review your guest list. They may be able to provide you with the most up-to-date names and addresses.

Determine if the invitation is for an individual only or if it will be addressed to the invitee's spouse/ significant other or guest as well. Remember that this affects invitation wording, which should invite the individual or the individual and a guest. You will also want to determine if faculty or staff spouses should be invited. A good rule of thumb is to ask if the event is a normal extension of the work day, or is it a social event such as a dinner acknowledging a significant accomplishment. There are numerous individuals involved in the planning stage who can steer the invitation process correctly.

When preparing the master guest list, compile the names alphabetically in an Excel spreadsheet or database. This enables you to check for duplicates, tally RSVPs and capture other important information that needs advance preparation such as special accommodation. Invitations should include a person's title, name, and complete address with no abbreviated street names or cities. It is acceptable to abbreviate states. Please follow the recommendations in Letitia Baldrige's *Complete Guide to Executive Manners*

Review the guest list for errors and omissions. Seek the review and input of other colleagues familiar with your guests and the purpose of the event. Envelopes should be printed using an appropriate font or hand written. Whenever possible, avoid using labels on invitation envelopes as they are impersonal and give the impression of a mass mailing. Invitation to the Baldwin House should never contain labels. Use only first class postage stamps for invitations, do not use second class or metered postage. Exceptions to this rule are inter-campus mailings to faculty, staff and students. Custom stamps with images commemorating your college, department or event can now be purchased online. Using a computer and printer, envelopes can be addressed properly. Please see the check list for invitation guest lists at the end of this guide.

Designing the Invitations

Contact the university's Creative Services Department for assistance designing invitations. Make certain your invitation contains correct information and that you make it as easy as possible for your guests to find the location and to reach you for any additional information. The invitations must reflect the graphic design standards of the university.

Timelines are determined by the type of event you are planning. For instance, invitations to conferences and lectures should be mailed several months in advance. Invitations to special celebrations should be sent at least one month in advance. Be

sure to factor in the time needed at the post office for sorting and distributing the materials. An invitation must arrive at a person's address a month in advance of the event or even earlier during the social season.

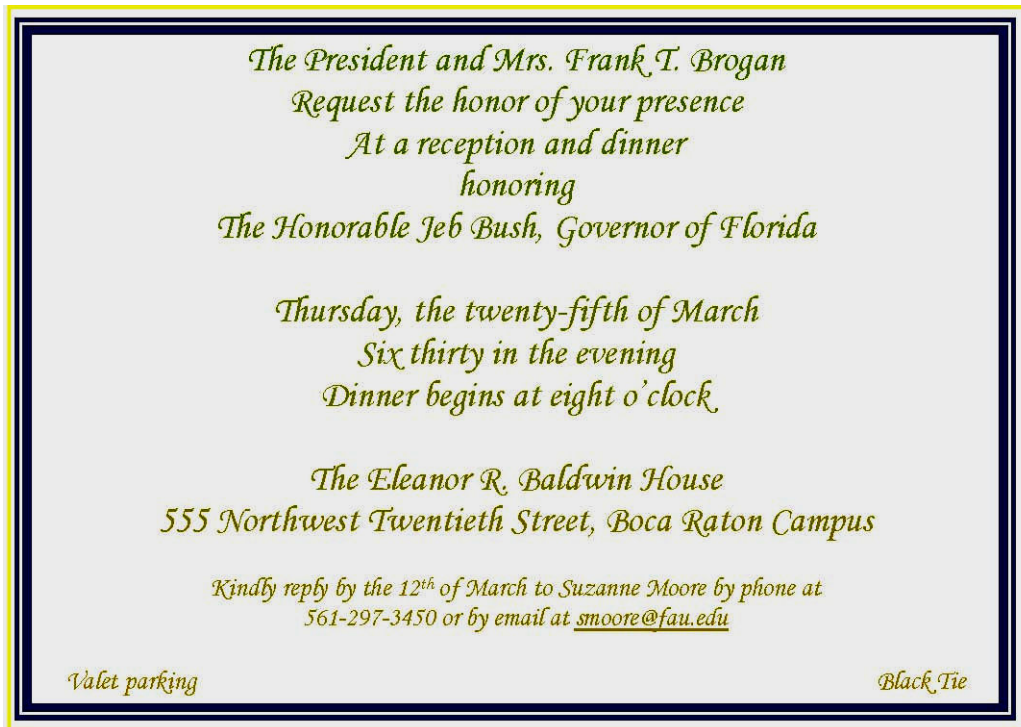
It is sometimes helpful to send out a "save the date" card or notice in advance of sending official invitations to an event. This may take place as far as six months in advance. There are times when an invitation or a follow-up invitation may be distributed using e-mail. This should be discussed with the senior person responsible for organizing the event.

Invitation Wording

The wording on the invitation is critically important to the success of any event. It sets the tone, establishes the host, and conveys the significance of the occasion. A great deal of thought and attention should go into all invitations. There are ten critical points of information that must be included in all invitations presented by this University. We borrow these ten elements from Letitia Baldrige's *New Complete Guide to Executive Manners* and recommend you follow her guidelines:

1. Organization's Symbol
2. Name(s) of hosts
3. Phrasing of invitation
4. Kind of event
5. Purpose of the event
6. Date
7. Time
8. Place
9. Special Instructions
10. How to respond

Formal Example:



Informal Example:

President Frank T. and Mrs. Courtney Brogan

*Cordially invite you to a reception
honoring*

Presidential Scholarship recipients

*Thursday, March 25, 2006
5:30 p.m.*

*The Eleanor R. Baldwin House
555 Northwest Twentieth Street, Boca Raton Campus*

*Kindly reply by March 12, 2006 to Suzanne Moore by phone at
561-297-3450 or by email at smooore@fau.edu*

RSVPs

The wording you choose on the invitation must be correct. RSVP is an abbreviation for a French phrase, *répondez s'il vous plaît*, which means *answer please*. If you say "please RSVP" you are saying please respond please. Instead, use the phrases, "kindly reply," "reply" or "RSVP".

Determine an appropriate person, place, and process for receiving guests' responses. With today's technology there are several acceptable options, but above all, provide your guests with the opportunity to speak with someone. There are times when a guest has a situation that they would like to talk personally about, such as food allergies or accommodation of a disability. Invitations for FAU events should include RSVP instructions in the following order:

- Full name of employee receiving responses
- Employee's phone number
- Employee's email address
- Automated voicemail response number and/or web site for responding
- Deadline for responses

Many factors determine an RSVP cut-off date. Consider the following: guests sending in money to register, guests are selecting entrees or registering for various break out sessions or guests need follow-up materials, such as parking passes and tickets. These all affect when you need to hear from them.

FAU LOGO HERE

You and a guest are invited to join
President and Mrs. Brogan for the

20th Annual Staff Picnic

food * games * softball tournament * children's area

Saturday, May 1, 2004

Noon – 4 p.m.

The Outdoor Lawn of the University Center
FAU Boca Raton Campus

Call Joanne Smith at 7-XXXX for more information.
Register your attendance at the website: www.fau.edu/picnic
Rain location will be the Live Oak Pavilion

EVENT LOGISTICS

Think of event planning as the act of linking together dozens of small projects and details. Your focus is always on scheduling, communicating, and confirming. As you begin preparing for an event, we offer the following topics, which should guide your planning and decision making.

Things to know before getting started:

- Purpose
- Budget
- Guest List
- Approximate expected attendance
- Type of event and type of space
- Staff person/office responsible
- Time of day
- Catering requirements
- Printing needs
- ADA compliance: make certain your event is easily accessed and accommodating of all people

Important Logistics:

Location: Is it on or off campus, is it easy to find, is the facility clean and well maintained?

Transportation and Parking: Will there be attendants or valet? Is it easy to find, will there be enough spaces, are there ample handicapped space? Are you offering shuttles, where will they pick up and drop off, at what time will they operate, who is responsible, how do the guests know about the shuttle? Have you requested to reserve a parking lot for guests? Have you requested special parking passes for this lot? How will guests know where to park; do they have to pay?

Street or directional signs: Will these be needed, interior signs only, do you need easels, and have you secured sign approval with facility and Space Utilization?

Printed Materials: Will there be invitations or flyers, will there be a program distributed at meeting, what other materials will be available, who is responsible?

Refreshments: Will you be serving beverages, snacks, or a complete meal? Will it be a buffet reception or plated sit down event; how many people; what are the dietary needs; will it be inside or outside? Remember, we are a Pepsi university!

Bar: Are you complying with university liquor policy, is it a full bar or wine and beer only, what non-alcoholic drinks are being offered, who is checking identifications? Plan one bar per 100 people.

Room layout: Will it be set up classroom or theater style; tables with chairs; will media be present; will there be video cameras; where will the screen go; will there be a stage?

FAU Banners and Logos: How are you incorporating FAU into the room, are there banners, podium signs?

Flags: Make sure there is a U.S. and State of Florida flag by the podium, see flag etiquette on page 21 of this booklet.

Room Layout: Is there a stage, podium, program, are you using chairs and tables, have you considered your AV needs?

Podium: Does the facility possess a podium, what is its condition? It should have FAU logos displayed on the front. Don't forget a small table or area near the podium to hold water for the speakers.

A/V needs: Are you presenting with PowerPoint, do you need a microphone, risers, phone lines, computers, multiple podiums or participants, extension cords, special lighting?

Storage and Deliveries: What materials, supplies and items will you need to organize the event? Where should deliveries be sent and where will materials be stored at the event? Who is responsible for receiving or security of these items?

Registration Table – Check In: Where will it be located, who will staff table, will staff be seated, how will table be organized, how will it be decorated, what about waste cans and extra supplies, who is responsible for clean-up? Does the table need cloths?

Nametags: At what point during the event will nametags be distributed? Will they be at the registration table or sent with advance materials? Who is producing them, what will they look like, how will you handle walk-ups?

Staff: Who will be on hand to assist and supervise? Are you providing food for those working all day? Does everyone working know his/her role and responsibilities?

Security: Will there be any valuables that need to be secured, have the police been notified, who are the VIP's, what plans are in place if anyone has a medical emergency, what about uninvited guests?

Décor: Plant rentals, colors, flowers, banners, signs, theme, donor/sponsor recognition, candles, rentals, china, flatware, glassware?

Entertainment: Do you use live entertainment or background music; do the musicians need special arrangements such as a green-room, meals, or transportation? How are they being paid? Do you have a written price from the musicians in advance?

FAU Ambassadors

The FAU National Alumni Association (FAUNAA) has established a corps of student leaders who accept the responsibility of serving as hosts at university-wide events. This organization provides leadership and support to events occurring not only for the Alumni Association but also for the President and other members of the FAU community. The Ambassadors dress in uniforms and are trained to greet guests, speak to the public and handle registration desks. They are excellent representatives of FAU's student body, and we encourage you to use their abilities at your event. Ambassadors can be scheduled through the office of Alumni Affairs.

http://www.fau.edu/alumni/ambassadors/service_request.htm

Audio Visual Services (AVS)

Audio Visual Services, a division of University Learning Resources, is designed to support faculty, staff, student organizations, and various university functions. They specialize in providing a variety of A/V equipment that can be delivered to locations throughout the Boca Raton campus. The equipment available to faculty, staff, and student organizations of FAU is as follows:

- Laptop Computers
- Loudspeaker System
- Overhead Projectors
- Data Projectors
- Slide Projectors
- TV-VCR Carts
- Teaching Podiums, Multimedia (in select teaching auditoriums)
- Single-Camera Videotaping w/wireless microphones
- Audiotape dubbing

If you have any questions, comments or concerns, AVS can be reached by e-mail at avserv@fau.edu or by phone at 297-3707. They also can refer you to the appropriate contacts for Broward, Jupiter, and Port St. Lucie campuses. If you would like to reserve any of the equipment listed above, please fill out the on-line form available on the web site: http://ulr.fau.edu/a_v.htm

Catering and Food Service

Food service on the Boca Raton and Jupiter campuses must be provided by Chartwells unless a waiver is secured through the Food Service Operations Office in the University Center, room 204 or through the website <http://www.fau.edu/dining/cateringpolicy.html>. Separate catering arrangements should be made for events taking place on a Broward county campus or on the Treasure Coast campus, contact the university advancement or university relations office for their preferred vendors.

Contact the catering director for assistance with menu planning, decorations, and rental equipment. The catering director should be contacted before the date is finalized to ensure they are able to meet your needs.

You should be aware of the University's policy on serving alcohol, see information on page 14 of this document and Policy Memorandum #19, 4th Revision. Chartwell's is the appropriate vendor for the Boca Raton and Jupiter campuses. For further information on menu ideas, visit Chartwell's web site at: <http://www.fau.edu/dining/catering.html>

Music

The School of the Arts and department of Music in the Dorothy F. Schmidt College of Arts and Letters has a list of musicians and musical groups available for hire. Check with Division of Financial Affairs or the Foundation office ahead of time regarding payment to ensure contracts are administered appropriately.

Nametags

Whenever possible, preprinted nametags should be prepared for all guests. These nametags should be displayed on a table in alphabetical order, from left to right. Ensure

that you have ample staff and hosts to assist guests in finding and placing their nametags. You should have extra nametags and pens on hand in case additional tags must be made.

Currently, the University has a nametag template, which is recommended for use. Contact the President's office or University Advancement to request a supply. These nametags are perforated and self sticking. For events where guests, especially females, will be wearing expensive clothes, have nametag holders that offer guests an alternative to sticking tags to their clothes.

A nametag should be simple and easy to read. We recommend including a person's first and last name. The font should be done in Arial or Times Roman, centered, and in at least a 24 point type. It is not necessary to include titles or middle initials. There are times when it is important to include a person's organization or department, for instance when the event includes representative from different universities, states, or countries. This should be determined on an individual basis.

Including the graduation year of FAU alums following their name is another practice that we encourage. University Advancement and Alumni Affairs will help you with this process by running your guest list through their data base.

Parking

Traffic & Parking strives to be a supportive partner when departments have special events or visitors coming to the FAU campus. The organizing department must contact Traffic and Parking ahead of time to plan for traffic flow, parking location, necessary staff, temporary decals, and signage. Traffic & Parking will confirm by telephone or e-mail if visitor tags are going to be issued. Traffic & Parking also will assign specific lots in which the permits will be valid. If you do not receive confirmation, contact the Traffic & Parking before your event begins.

If the department chooses not to make prior arrangements for visitors, please advise visitors to go to the Traffic & Parking or the visitor's center before parking on campus to receive a free temporary hangtag for the day. Visitors are asked to provide their license plate numbers.

For campuses in Broward, Jupiter, and Port St. Lucie, contact the campus vice president's office for guidance regarding parking matters. If you have any questions please feel free to contact Traffic & Parking office at (561) 297-2771. To begin the process of requesting temporary hangtags ahead of time, visit their website: http://parking.fau.edu/vis_form.asp

Signs and Visual Communications

The Creative Services Department combines the high-technology services of Instructional Graphic Arts and Instructional Photography. Graphics professionals can assist in consulting, designing, and producing standard and electronic layouts; camera-ready artwork; and fully rendered computer graphics for direct instruction and the web. There is no charge for materials designed for direct instruction. Charges for supplies used in the production of these materials are applicable. All work requested will be handled on a first-come, first-served basis; however, materials used in direct instruction will be given priority. To initiate a work order, the following information must be provided

and if work is to be produced outside the university, a purchase requisition must accompany a request containing the following information:

1. Contact Name
2. Department Name
3. Phone Number
4. A university index and fund number or FAU Foundation account number and a due date
5. A brief description of the type of artwork requested

Staff will consult with you concerning the most appropriate means of handling the project and will provide an estimate of the project costs if necessary. All project requests should be submitted at least two weeks prior to the due date. Please be aware that large volume or intricate jobs require more production time. The due date is subject to change if revisions of completed work are requested. All artwork to be reproduced from an original source other than the Creative Services Department at FAU must have appropriate permissions to avoid any copyright infringements.

To initiate a project, visit their web site at:

<http://www.fau.edu/communications/publications/>

RISK MANAGEMENT

This section addresses the University's current policy on serving alcohol and responsibilities for the public's safety.

University Policy on Alcohol

The University's current alcohol policy is based on Policy Memorandum 19, most recent revision issued on September 27, 1990, by the President. The wording of the policy is printed here for your reference. Interpretation and enforcement of this policy should be left to the University Attorney and the University Police.

I. General Requirements

1. When serving alcohol on campus, organizations must adhere to the alcoholic beverage laws of the State of Florida, to municipal and county ordinances, and to applicable University rules and regulations.
2. Alcoholic beverages may only be served to and consumed by persons who are of legal drinking age. Proof of age, as determined by a State of Florida driver's license, Florida State identification card, valid passport or other official identification, which includes a photograph of the individual, is required.
3. Other than as sold by the University's licensed food service (Chartwell's), alcoholic beverages must be served free of charge. No monetary exchanges of any type may be a prerequisite for attending an event in which alcoholic beverages will be served. Additionally, no collections or donation of any type are permitted during an event.

II. University Regulations

A. Locations

Alcoholic beverages may be served or consumed in conjunction with an approved event in the following areas: University center, in designated areas approved by the director; residence halls and their grounds when approved by the director, the recreation pavilion, when approved by the director; designated areas within other campus buildings or outdoor locations when approved by the university vice president responsible for that area.

Possession, serving, and consuming alcoholic beverages is permitted in private rooms of individuals of legal drinking age in university housing, and at the residence hall pavilion area when registered properly, providing all laws and university rules are residence hall regulations are observed.

B. Registration of Events

1. Student Groups

- a. Any student organization intending to serve alcoholic beverages at any event must first ensure that all its officers and advisors have attended a workshop on the university's alcohol policy, registration procedures, and liability issues sponsored by the Student Activities Office.
- b. After completion of the above workshop, organizational representatives

must complete a program registration form in the Office of Student Activities with concurrence from the group's advisor and from the Dean of Student Affairs. No event will be authorized until all approvals have been given.

- c. The program registration form must be initiated at least ten (10) days prior to the date of the proposed event.

2. Non-student Groups

Faculty, staff and any other non-student group or persons, must receive written approval for an event from the Vice President responsible for the group and for the facility requested. The facility manager must also receive notification of such approval.

C. Guidelines for Events

1. Individuals sponsoring an event must establish precautionary measures to ensure that alcoholic beverages are not served to persons under the legal drinking age or persons who appear to be intoxicated.
2. Students, faculty, and/or staff participants at University-sponsored events where alcoholic beverages are served must have available a current valid university identification to gain admission. Participants may be required to present two forms of identification, one of which must contain a picture.
3. The serving of alcoholic beverages will be limited to four hours.
4. Quantities of alcohol approved for an event will be proportionate to the anticipated attendance by those of age and the length of the program. A formula for specific quantities is available to registrants in the Student Activities office.
5. Advertising of events (including fliers, advertisements, notices, posters, banners, etc.) for any function at which alcohol is served shall not refer to quantity of alcohol available nor shall alcoholic beverages be a prominent part of such advertisements.
6. Sufficient quantities of non-alcoholic beverages and food must be provided by the sponsoring group or individual and made available to those individuals who may desire them. These quantities will be designated and must be approved at the time the event is registered.
7. Only those alcoholic beverages that are served may be possessed or consumed at an event. Individuals may not bring in their own alcoholic beverages. The served alcoholic beverages must be consumed within the facility designated for the event.
8. The Dean of Students or his/her designee is authorized to approve alcohol requests for beer and/or wine at student functions. Requests for other alcoholic beverages must be approved the University President or his/her designee.
9. Student groups and organizations requesting permission to serve alcoholic beverages at an event must adhere to any stipulations required on the program registration form. Such stipulations shall include, but are not limited to, the presence of the group advisor during the time alcohol is served and adequate provisions to ensure that underage persons are not served.
10. Alcoholic beverages may not be consumed or served at intramural sports events or intercollegiate athletic contests.

D. Penalties

Individuals or groups in violation of this policy will be subject to loss of privileges and disciplinary action as determined by University rules. Such action may include assigned community service with the campus drug and alcohol awareness program, completion of a mandatory alcohol education course and/or suspension from the University for repeat offenders. Actions by the University for violating this policy do not preclude prosecution by outside authorities.

III. Public Safety

Aside from the responsibilities connected to serving alcohol, the person and department responsible for planning an event must consider several important issues. The safety and security of all guests is your number one priority!

- Be certain to notify the Police Department of your upcoming event.
- Always have telephone service and access at an event, preferably with land lines as well as cell phone. The event coordinator should always be reachable by cell phone.
- Think through traffic and parking thoroughly. Work with the professionals in FAU's Traffic and Parking department. Have adequate staff to manage the cars and pedestrians.
- Arrange for security when appropriate. With large groups, make certain there is someone on staff who is trained in CPR. FAU police cars contain defibrillators, which is another reason to make certain the FAU police are aware of your event so they can provide roving patrols.
- For events both on and off campus, you should know the location of all emergency exits, fire extinguishers and first aid kits.
- For large-scale events, walkie-talkies are a convenient option for communication between Traffic and Parking, FAU Police, event planners, and site managers.
- Remember to make certain there is easy access and accommodation for all guests.

PROTOCOL AND GUEST RELATIONS

Introductions

Many of the guests received at university events are actively involved in social and community projects. FAU events must be carried out at the same level of quality, regardless of whether it is a black tie event or a barbeque.

One of the easiest ways to show respect and honor to a guest is to introduce him or her properly. Again, there are several different methods or approaches. Here at FAU, we follow Leticia Baldrige's recommendations from her book, *The Complete Guide to Executive Manners*. In addition, Oretha Swartz's *Service Etiquette, 4th Edition* is especially helpful when dealing with members of the Armed Forces and military rank and honors.

A proper introduction is mediated by a third person who is introducing one person to another. This can be done either in a receiving line or in a social setting. The elements are the same. Being able to provide a proper introduction sets a person apart as being extremely thoughtful, professional and articulate. This impression certainly translates to the university as a whole. Most importantly it makes the guest feel welcome. Finally, a proper introduction takes practice.

Introductions are very logical: you always present the person with less seniority TO the more senior person. Introductions should be brief and accurate. For the military, commissioned and non-commissioned officers in all services, male and female, are introduced and addressed by rank or rating. Traditional social protocol calls for a man to be presented TO a woman, unless the man is the President or King of a country.

Here are some examples from Baldrige's book (p. 10). These examples are gender neutral as business manners today do not make clear distinctions between a males and females.

- A younger person TO an older person
- A peer in your organization TO a peer in another organization
- A junior executive TO a senior executive
- A fellow executive TO a customer or client
- An individual TO a group

Now, to translate this concept to a university setting:

- An undergraduate student TO a graduate student
- An associate professor from your institution TO an associate professor from another institution (no matter the academic standing of the institution)
- A faculty member TO a university trustee
- The President TO a donor (This would be done if the person had made a significant gift to the university and you were attempting to express appreciation and respect.)
- A new staff member TO the President
- An alumni association member TO a trustee
- Foundation Board members TO the President
- The President TO a Nobel Laureate
- A vice president from another university TO your institution's President

A good rule of thumb is to remember that **the name of the highest ranked, oldest, or otherwise most distinguished person is spoken first, and the name of the less senior or youngest person is spoken last.** The introduction should be structured something like this: "Senior Person, may I introduce (or present), Less Senior Person". Greater authority **RECEIVES** lesser authority being presented.

Here are some "real world" examples...

President Brogan, may I introduce TO YOU Dr. Suzanne Moore. (Never say "you to" as this would reverse the order of precedence.) Dr. Moore, this is President Brogan. President Brogan, Dr. Moore is a new faculty member in our department of music.

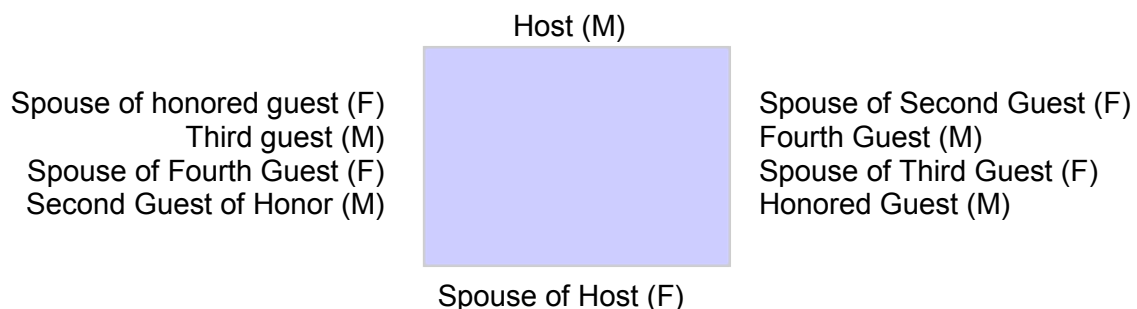
Ms. Plymale, may I present TO YOU Mr. Anthony Barber. Mr. Barber, this is the chair of our Board of Trustees, Ms. Sherry Plymale. Trustee Plymale, Mr. Barber is the incoming president of our Alumni Association.

Leticia Baldrige offers the following recommendations when conducting introductions:

- Explain who people are when you introduce them. Introduce people by their name and perhaps their position or their association with you.
- Give information when you introduce them, something that might be a starting off point for conversation.
- Remember to use titles when introducing people
- Know what titles accompany people for life and use them
- If you forget someone's entire name and you know them well, admit it, laugh, and move on. It happens to everyone...honesty is most important.
- Always give your name first so the other person doesn't have to remember.
- If your last name is different than your spouses, make sure this is communicated in social settings.

Table seating

There are two different and completely acceptable approaches to organizing seating arrangements that we take from Letitia Baldrige's "New Compete Guide to Executive Manners," p. 302-304. Knowing the purpose of the event, the guests attending, and the set up of the room all factor into the appropriate method. Either one is acceptable; the most important thing is to pick one and follow it. There is nothing worse at a dinner party than a thoughtless seating arrangement or being told to sit anywhere. The first is to alternate sexes and separate husbands and wives. The hosts are seated at each end of the table and the other guests mixed in between. The most important guests, or the guests of honor, are seated to the right of the host and hostess.



If the Honored Guest is a woman, as is often the case, this seating chart would reverse

the guests so that the female honored guest would be closest to the Host and her spouse would be seated next to the Host's spouse.

The second approach considers seating based on rank and position. This means that gender or spouse is not a factor in placement. Seating is done by importance to the occasion and their "rank" in business, community, or institution. If spouses are included, the same rank is assigned to the spouse.

Table Host (most senior person)



Co Host

(2nd highest ranking person in organization, may or may not be a spouse)

Now, this seems relatively simple until you attempt to apply the exact concept to 50, 100 or even 500 guests. The same concept should be applied, but that is complicated. Select a host, who should be a university representative, for each table and attempt to mix the guests appropriately. Consult your department chair, the university advancement office, director of the Baldwin House or the president's senior administrative assistant for assistance with seating charts for a specific event.

Other elements of table seating are place cards, a seating chart, briefing table hosts on their tables' guests, and introductions. FAU place cards are available from University Advancement or the President's office. Place cards should contain a person's title (including elected or former elected officials, religious titles, military rank) and his or her first and last name. Examples: Reverend John Lewis, Colonel Steve Smith; Dr. Alice Lee, Congressman Johnson. Place cards for FAU events also should have the FAU seal or logo. Guests at the president's table should be included in addition to a complete guest list with the Presidential Event Briefing Sheet. Table hosts should also receive an abbreviated version of the briefing sheet with their table guests to encourage them to introduce all guests and initiate conversations. Seating charts should be prepared two different ways: alphabetically and by table.

Displaying the Flag

When hosting visiting dignitaries and conducting significant university occasions, the displaying of flags has important implications. Before doing so, be certain you are familiar with flag etiquette. The flag of the United States of America is always given a special place of honor and should be positioned on its own. The American flag should always be to the speaker's right and the audience's left. Other flags should be positioned on the speaker's left.



When you are displaying a group of domestic flags, the US flag should be in the center and on a platform raised above the others.



When you are displaying flags from several countries, all flags should be the same size, on separate poles of the same height, and displayed in a straight line. Again, the US flag should be to the right of the line of flags.



For further clarification on this issue, please consult the National Flag Foundation. Their web site is: www.americanflags.org

Event Briefing Sheets

Two to three days before an event, an informative briefing sheet should be prepared for the President or the most senior people participating in your event – most certainly whoever is speaking. The briefing sheet should be given to the President's chief aide and any other appropriate vice presidents and/or senior staff, as well as the person responsible for the event facility. This document should include the following information.

1. Event Title
2. Date & Time
3. Place
4. Special instructions regarding parking, tickets, directions, etc.
5. Expected attendance and make-up of attendees
6. Meal/food service
7. Purpose of the event
8. Program outline, including the role of the President
9. Topics/bullets for President's comments
10. Brief information on guest of honor or key element of the program
11. Staff responsible for event
12. Complete guest list with individual's affiliations should be included with the briefing sheet

Guest Relations

Staff, students, and volunteers who are participating in the organization and orchestration of an event should be prepared ahead of time, have assigned duties, and be easily identified through uniforms and/or appropriate nametags. Proper attire should be determined as well.

For major events that take place over an entire day or evening, or even multiple days, the following steps should be followed.

1. Designate one person responsible for the event
2. Appoint a small and effective committee to oversee the coordination and implementation. The committee should be charged by the President and understand their role, both collectively and individually, in carrying out the important project.
3. Consider the following issues:
 - Security
 - Transportation
 - Hospitality
 - Hotel accommodations
 - Campus signage
 - Printed materials/letters/programs/invitations
 - Funding and financial issues
 - Photography
 - Meeting locations
 - Publicity and media communications
 - Recognition of dignitaries, university trustees, elected officials
 - Gifts and awards

4. Make certain that events are adequately staffed to support guest requests and to support the President, dignitaries, and trustees.
5. Designate informational phone numbers and people to problem solve and answer questions.
6. Allow ample time for planning, walk through, set ups, and break downs.
7. Remember to express appreciation and communicate your gratitude via a verbal or written thank you to everyone involved.

COMMUNICATIONS

Florida Atlantic University's Office of Marketing Communications is responsible for disseminating university messages to internal and external audiences. The Office is comprised of the departments of internal communications, marketing and advertising, media relations and creative services. By collaborating with all areas of the Office regarding university events, one can more effectively promote events to FAU constituents and the community at large.

Department of Media Relations

Publicity

Publicizing and promoting special events requires the same care and planning as the event itself. One must consider:

- pre-event publicity opportunities to generate maximum attendance; and
- ideas for post-event coverage

It is very important to notify the Office of Communications when an event is being planned. This will allow for maximum exposure regarding the event, as the Office can create carefully targeted messages. Pre-event publicity can include a mix of news releases, public service announcements, calendar notices, update to a web page, mass email, banners, fliers, posters and advertisements.

Media Coverage

As soon as an event is scheduled, please contact the assistant vice president for media relations at 561-297-3020 to discuss the appropriate media strategies. If a major event, defined as events sponsored by the president's office or involving dignitaries, including heads of state, cabinet members, international leaders, celebrities and other public officials, is to occur, the department of media relations will take the lead on publicity for that specific event.

At this time, the university has one staff photographer to support events. You may also make your own arrangements for a professional photographer. It is recommended that you ask for prints as well as CD-Rom.

Department of Creative Services

Flyers, Posters and other event collateral

The Department of Creative Services can help you identify the most effective publication or document to promote your event. Whether it is an invitation, brochure, flyer, poster, banner or even a web page, they we can assist in choosing the most effective collateral and handle the design and production.

Planning your publication

It is important to plan a project properly to allow enough time for a good design/layout and quality production. The design and approval process generally takes 2 to 3 weeks, not including the printing time. Turnaround may vary, depending on the nature of the project, if all the necessary elements are provided to creative services in a timely manner and how long it takes to get all parties to review and approve the document.

Please use the guide below to plan a project in a way that allows Creative Services enough lead time to produce the highest quality results for your design.

Invitations/ Note cards/Postcards/Flyers	3-5 business days
Tri-fold Brochure / event programs	1-2 weeks
Posters & Banners	1-2 weeks
Web page or banner ad	2-3 weeks

Printing

Printing generally takes ten business days (2 weeks) from the date the project is sent to the vendor. There are no exceptions; however, Creative Services may be able to work with the vendor on a case by case basis to get faster results.

For more information and other helpful guidelines, call (561) 297-3025 or visit the website at <http://www.fau.edu/communications/publications/>

Department of Marketing & Advertising

Promoting Your Event

FAU's Marketing and Advertising Department serves as the hub for the University's strategic marketing efforts. In addition to developing a university-wide awareness campaign, the department collaborates with all departments and academic units to help them develop marketing plans, coordinate media buying and develop a strategy for successful brand management.

The goal of the department is to maximize FAU's advertising dollars by collectively negotiating with vendors from a university-wide standpoint. Additionally, the department ensures all print, radio, web and television advertising is consistent with the message and visual standards of the university.

Event promotion can fall under two general categories: paid advertising and (unpaid) publicity. Working closely with the media relations office to promote your event through the press is ideal since there is zero cost. You can also do email blasts, though unless your list is well-qualified the response rate can be disappointing.

But, sometimes you have to go directly to your audience with paid advertising. If you have funding and are planning to do outside marketing and advertising to promote your program or event, please contact the department's director as early as possible. Media outlets oftentimes book their space well in advance, so if you plan to purchase ad space, contact us at least six weeks prior to your event. If you need print ads designed, radio scripts approved, or TV spots produced, more time may be required.

Department of Internal Communications

The internal communications department is responsible for providing news and information to FAU's faculty, staff, students, alumni and other constituencies. The department is also responsible for creating and implementing internal communications strategies and helping facilitate the flow of information among the various departments and colleges of the university.

Among the delivery vehicles for news is *Update*, a monthly faculty/staff publication.

Update currently provides news about important university events, new curricula and degrees, innovative programs and research initiatives, personnel and benefits items, campus news and outstanding faculty and staff achievements.

Internal communications also is the central resource for late-breaking campus bulletins and daily email delivered *Announcements*. Through these targeted e-mails, faculty and staff are kept informed about news items ranging from security warnings to campus events.

EVALUATION AND FOLLOW UP

A successful special event at FAU should achieve the following standards:

1. Ability to articulate the following items in the initial planning process:
 - a. Target audience (s)
 - b. Key messages
 - c. Objectives for the event
 - d. Budget and funding sources
2. Invitations were prepared according the guidelines and were distributed on time.
3. Appropriate offices were notified in advance to ensure appropriate participation of key university officials and necessary security, avoid duplication of efforts and conflicting events, and consideration of development and fundraising efforts.
4. Response process went smoothly. The number of people replying and those attending matched.
5. Event planners had prepared contingency plans for weather, parking, and security issues.
6. The university president and appropriate senior staff were briefed ahead of time regarding the program, guests, and schedule.
7. Necessary internal and external communications were coordinated with news media through the Office of Communications and handled professionally.
8. Special accommodations and instructions for guests were taken care of ahead of time.
9. Name tags were prepared correctly ahead of time. They were easy to access for guests.
10. Elected officials and special guests were introduced according to protocol.
11. Guests were greeted in a warm and welcoming manner by various methods, such as signs, staff, and Students Ambassadors.
12. The visual elements of the event including invitations, signs, podium, banners and programs, all reinforced the FAU logo and adhered to the university's visual identity standards and the publications department.
13. Following the event, appropriate individuals received recognition and thanks.
14. Invoices were processed in a timely manner.
15. Event costs were in line with anticipated costs.
16. Objectives were met and articulated.
17. Working through the media relations department, photos and post-event media release are submitted to local papers for social media coverage.
18. Written evaluation is prepared and placed in event file for future planning efforts.
19. In the end, people shared a laugh, had a great time, learned or experienced something new, and left with a positive impression of FAU!

CHECK LIST
FLORIDA ATLANTIC UNIVERSITY EVENT INVITATION LIST

FAU Board of Trustees

Chair & Vice Chair
All Board of Trustee Members – contact
president's office
<http://www.fau.edu/bot/>

Executive Committee

Provost and Executive Vice President
Vice Presidents
President's Direct Reports
<http://www.fau.edu/president/index.php>

Academic Administrators

Vice Provosts
Deans
Directors & Department Chairs
College Advisory Boards
Faculty

Foundation Members

Executive Committee
All Board of Directors
<http://universityadvancement.fau.edu/NetCommunity/Page.aspx?&pid=203&srcid=223>

Alumni Board of Directors

Key Officers
All Alumni Board of Directors
<http://universityadvancement.fau.edu/NetCommunity/SSLPage.aspx?&pid=854&srcid=854>

Campus Advisory Boards

Boca Raton Campus Board
Broward Campus Board
Jupiter Campus Board
Treasure Coast Campus Board

Student Government

SG President
SG Executive Board/Cabinet
SG Senate
All SG Board of Directors
Presidents of Student Organizations
Associate Dean of Students (SG Advisor)
<http://sga.fau.edu/>

Donors

Million Dollar Donors
\$100,000 Donors
President's Club
1961 Society
Buildings Namesakes
Football Founders
Owl Fund Members
University Club
Major Prospects

Elected Officials

Boca Raton Mayor
Boca Raton City Council
Other Local Mayors & City
Councils
County Commissioners &
Administration
Legislative Delegation
Florida Legislators
Florida Cabinet
US Congressman
US Senators

Florida Department of Education

DOE Commissioner
Board of Education
Board of Governors
Executive Staff of DOE

Area Educators

Local School Boards &
Superintendents
Community College Boards &
Presidents
Area College & University
Presidents

CAMPUS CONTACTS

Alumni Affairs	ADM 201		
	Pat Breman	7-2190	pbreman@fau.edu
	Lee Collier	7-1172	lcollier@fau.edu
	Paul Metcalf	7-1248	metcalf@fau.edu
	http://www.fau.edu/alumni/ambassadors/service_request.htm		
Athletics	Oxley Center		
Public Information	Katrina Mc Cormick	7-3163	kmccormi@fau.edu
Events	Danielle Daniel	7-0211	ddaniel@fau.edu
Ticket Office	Shelly Binegar	7-0408	sbinegar@fau.edu
Marketing	Dexter LaMont	7-2953	dlamont@fau.edu
Audio Visual Services	ULR 217		
	Malcolm Mc Kinney	7-3698	
	http://www.ulr.fau.edu/avrequest.htm		
Baldwin House	75-119 or 10-334		
	Debbie Brown	7-0325	dbrown@fau.edu
	http://wise.fau.edu/president/baldwin/		
Board of Trustees	ADM 346		
	Jennifer O'Flannery	7-0745	joflanne@fau.edu
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Broward Advancement Office			
	Sheryl O'Neil	6-5275	soneil5@fau.edu
Campus Maps	ADM 383		
	Elfriede Lynch	7-3023	emlynch@fau.edu
Chartwel's Catering and Food Service			
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Grounds and Landscaping	UB 212		
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Office of Communications			
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Visual Communications ULR 241	Mardie Banks	7-0367	mbanks@fau.edu
FAU Police	Main Line	7-3500	
FAU Physical Plant UB 212G	John Singer	7-0193	singer@fau.edu
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	Terry Gearing	6-8026	gearing@fau.edu
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	Lill Dukate	7-3450	dukate@fau.edu
School of the Arts			
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Space Utilization CO 101			
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	http://uavp.fau.edu/osua/		
Traffic and Parking CO 142A			
	Rudy Prato	7-2172	rprato@fau.edu
	http://parking.fau.edu/vis_form.asp		
Treasure Coast University Relations JU 330			
	Cara Carlton Perry	6-3339	ccarlton@fau.edu
TV Production ULR 217			
	Malcolm McKinney	7-3698	mmckinne@fau.edu
University Advancement ADM 383			
Asst. VP Comm.			
Donor Relations	Elfriede Lynch	7-3023	emlynch@fau.edu
Guests Lists/ Database/Website	Kate Workman	7-3479	kworkman@fau.edu
University Center UC 203			
	Catherine Webb	7-3734	cwebb@fau.edu
House Manager	Danell McKeel	7-3719	dmckeel@fau.edu

EVENT PLANNING WORKSHEET

ACTION	CAMPUS CONTACT	PERSON RESPONSIBLE	TARGET DATE	STATUS/ COMMENTS
Planning and Scheduling				
Determine objectives, budget and team to coordinate the event				
Determine date and time				
Reserve event on appropriate calendars				
Reserve location				
Prepare invitation list and have it approved by appropriate executive officer				
Determine order of program/activities/agenda				
Determine menu/beverages				
Contact Traffic & Parking to discuss parking arrangements				
Contact FAU Police Department to discuss security arrangements, if applicable				
Prepare and distribute event plan				
Contact office of Communications to determine internal and external communications needs				
Advance Preparations				
Prepare comprehensive budget and finalize funding sources				
Determine facility set up & distribute				
Schedule FAU Ambassadors & other volunteers				
Request musicians from Music Dept				
Audio-visual needs - contact A/V Services				

ACTION	CAMPUS CONTACT	PERSON RESPONSIBLE	TARGET DATE	STATUS/ COMMENTS
Invitations				
Purchase gifts, plaques, mementos				
Book photographer				
Order trees-plants-flowers				
Working with the publications department, prepare draft invitations (fliers, letters, formal invitations)				
Have draft approved – publications department will send to printer				
Compile mailing list & send to printer if applicable				
Purchase postage stamps or arrange for printer to inkjet/stamp/mail invitations				
Prepare RSVP/Name tag/ Place card list				
Signage				
Determine directional signage needs and send a completed "Temporary Ground Sign/Banner Application" with "Attachment I" to Space Utilization.				
Determine if easel signs will be needed				
Order directional and easel signage from IRM Learning Resources				
Order banners from an outside vendor, if applicable.				
Send completed "Marquee Request Form" to Student Government, if applicable.				

ACTION	CAMPUS CONTACT	PERSON RESPONSIBLE	TARGET DATE	STATUS/ COMMENTS
Day Before Event				
Print nametags (alpha order)				
Finalize seating chart, if applicable				
Print placecards, if applicable				
Provide the president and executive officers with agendas and names of any VIP attendees.				
Compile shot list for photographer				
ACTION	CAMPUS CONTACT	PERSON RESPONSIBLE	TARGET DATE	STATUS/ COMMENTS
Follow Up / Evaluation				
Debrief with appropriate people				
Send thank-you notes				
Photos in frames w/notes to VIP guests				
Make report to the file for future reference				