

CALIFORNIA STATE UNIVERSITY CHANNEL ISLANDS
EVENTS AND FACILITIES USE
PROCEDURAL GUIDELINES

Draft Revisions: August 2012

EVENTS AND FACILITIES USE PROCEDURAL GUIDELINES

TABLE OF CONTENTS

	PAGE
INTRODUCTION	1
OUTLINE OF FACILITIES USE PROCESS	1
I. University Facilities Use Procedures	1
A. Facilities Use Priorities	1
B. Events and Facilities Use Procedures	2
C. Standard Terms of a <i>Facilities Use Agreement</i>	4
D. Facility Rates and Service Fees	4
E. Insurance Requirements	6
II. University Facilities Use Responsibilities	7
A. The Vice President for Finance and Administration	7
B. Administration Receptionist	8
C. Transportation Lead/Special Planning Coordinator	8
D. Events and Facilities Committee	9
E. Division of Academic Affairs Designee	10
F. Division of Student Affairs Designee	10
G. Accounting Department	10
H. Communications and Marketing	11
I. Police Department	11
J. Transportation and Parking Services	11
K. Risk Manager	12
L. Procurement and Support Services	12
M. Operations, Planning, and Construction	13
N. Academic and Information Technology	13

TABLE OF CONTENTS
(Continued)

	PAGE
III. Definitions	14
A. Academic Scheduling Coordinator	14
B. Co-sponsored Event	14
C. Transportation Lead/ Special Events Planning Coordinator	14
D. Events and Facilities Committee	14
E. Events & Facilities Use Request Form	14
F. External Events	14
G. Events Master Calendar	15
H. <i>Facilities Use Agreement</i>	15
I. Internal Events	15
J. External individual, Organization or Agency	15
K. Procurement and Contract Services	15

EVENTS AND FACILITIES USE PROCEDURAL GUIDELINES

Introduction:

As set forth in the *Administrative Policy on Use of Facilities* for purposes other than scheduled instruction, the facilities of the University are available for purposes that promote the mission of the University and its activities. All licensing of general-use for university facilities and space is the responsibility of the Vice President for Finance and Administration. All use of facilities managed by the various auxiliary organizations and auxiliary enterprises is subject to the terms of their master agreements, by delegation of authority, the appropriate statutes, as well as to the terms of the *Administrative Policy on Use of Facilities* for purposes other than scheduled instruction.

These procedural guidelines apply to all use of university facilities and space by an external individual, organization or agency from the community as well as use by a university department, university auxiliaries, or other recognized university organizations.

Outline of Facilities Use Process

The Role of the Events and Facilities Committee (EFC) shall be to:

Oversee the approval of facilities and space in compliance with the university's mission. This includes the use of all campus facilities and space for commercial filming and photography regardless of delegation authority.

Ensure compliance with the *Events and Facilities Use Procedural Guidelines* or any administrative policies.

I. University Facilities Use Procedures

A. Facilities Use Priorities

1. The priorities for use of university facilities are set forth in Section 5.0 of the *Administrative Policy on the Use of University Facilities*.
2. *Facilities Use Agreement*, requested for commercial purposes, will be considered after the needs of university activities and events. Exceptions may be approved by the Vice President for Finance and Administration.

3. The university shall avoid engaging in facilities use agreements that would create income reportable for Unrelated Business Income Tax (UBIT) purposes, pursuant to Internal Revenue Code Section 513, and related regulations.
4. A moratorium on the scheduling of external events may be imposed in deference to university academic and resource needs of the university. Under the terms of a moratorium, all scheduling of external events, activities held (including facilities delegated or assigned to academic units, departments, and auxiliary organizations) that anticipate off-campus attendance and are not typically scheduled through Academic Affairs, are not allowed unless approved as an exemption.

B. Events and Facilities Use Procedures

1. All requests for the use of a university facility or space from a university department, university auxiliary, or other recognized university club or organization, must originate from the appropriate Division Designee. The Division Designee will enter the event in Live-25 scheduling software for requisite review and approvals by university service providers and, when appropriate, EFC representatives.
2. All requests for the use of a university facility or space from an external individual, organization or agency shall originate through the Transportation Lead/Special Events Planning Coordinator (TLSEPC).
3. A university department, university auxiliary, or other recognized university club or organization that decides to co-sponsor an event with an external individual, organization, or agency must receive approval from the Division Designee. Co-sponsorship may require the university affiliate to provide support staff and/or other resources.
4. The University name and logo in publicity may only be used with the approval of the Director of Communication and Marketing.
5. Request to use a facility or space should be filed at least six weeks in advance of the event. Request filed with less notice may not be processed or reviewed in time to accommodate the event. Longer lead time is advised if publicity for the event is required.
6. The Events and Facilities Committee (EFC) will determine the availability, the terms, and conditions for the use of any university facility or space.

7. If one or more EFC representatives determine that a proposed event poses inordinate risks for the university or an unacceptable disruption to normal operations for the university, a prompt notice detailing the concerns will be sent to the requesting individual or organization by the appropriate EFC representative. If resolution of the concerns cannot be reached, the application for use will be denied. A requestor may appeal the denial by contacting the TLSEPC and requesting an administrative review by the EFC.
8. The TLSEPC will schedule an administrative review by the EFC voting members and notify both parties of the date and time of the administrative review. Both parties shall be given reasonable time to present their case to the EFC before a vote is taken.
9. Upon receipt of the *Events and Facilities Use Request Form* by an external requestor or co-sponsored entity, the EFC is authorized to proceed with the agreement process and execute a *Facilities Use Agreement* in conjunction with Procurement and Contract Services.
10. The TLSEPC will obtain the *Facilities Use Agreement, Certificate(s) of Insurance*, and other necessary documentation from the requestor. The original documentation will be forwarded to Procurement and Support Services. Copies will be kept by the TLSEPC.
11. Use of university facilities or space, including those under license agreement to an auxiliary, for filming of motion pictures, videotape, or still photography is governed by the EFC representative and coordinated through Operations, Planning, and Construction (OPC).
12. The university will consider commercial sponsors for events. Any university department, university auxiliary, or other recognized university club or organization requesting a commercial event must check with the appropriate Division Designee and the Director of Communication and Marketing, who will assist in determining if the sponsorship conflicts with university policy or agreements. Sponsorship of any university event where the sponsor's name will be used publicly must be approved by the appropriate Division Designee and the Director of Communications and Marketing.
13. Alcoholic beverages may be sold and/or served only with the approval of the university President and the Chief of Police.

The requestor must adhere to the *University Alcohol Policy* and all applicable procedures and laws related to serving alcoholic beverages. For further information, forms, and procedures contact the TLSEPC.

C. Standard Terms of a Facilities Use Agreement

1. In all cases of a university facility and space rental, the external requestor will sign a *Facilities Use Agreement*.
2. All individuals or organizations utilizing university facilities must abide by university policies regarding the use of facilities and space.
3. Approval for the utilization of facilities is subject to the availability and suitability of the space requested and conformity of the proposed event with university policy.
4. The President of the university reserves the right to rescind space previously confirmed, if the facilities involved are needed for university purposes.
5. Cancellation of a *Facilities Use Agreement* by the requestor must be in writing and received by the TLSEPC a minimum of thirty (30) days prior to the scheduled event. The requestor forfeits their deposit and assumes financial responsibility for any labor and/or other direct costs accrued as a result of a scheduled event prior to cancellation of that event. Additionally, the requestor will be charged for actual expenses incurred by the university to support the activity if reservations are not cancelled by the established deadline.

D. Facility Rates and Service Fees

Facility and equipment rental rates and service fees for the use of university facilities, including those under auxiliary management are established by the Vice President of Finance and Administration. The rental rates and service fees are in accordance with California State University Executive Order No. 753 Allocation of Costs to Auxiliary Enterprises, Executive Order 757 Facility Maintenance and State Administrative Manual 8752 Full Cost Recovery Policy.

Facilities managed by the various auxiliaries under the terms of their master agreements may have additional or substitute fees.

1. Facility Rental Rates

Generally, facility rental rates should be comparable with competitive local area venues. Every year each divisional Vice President shall submit a proposed schedule of rates to the Vice President for Finance and Administration for facilities under their jurisdiction.

Facility rental revenues shall be deposited into the appropriate fund for the current year's budget. The Accounting Manager or designee will allocate monies received based on costs included in the contract.

2. Service Fees

Subject to the needs of each event and reasonable university guidelines, service fees may be required. For applicability, refer to the *Facilities Rates and Service Fee Schedule*. When appropriate, for co-sponsored events, the TLSEPC will inform the division designee of the various event expenses. External individuals, organizations and agencies shall have all event expenses identified through the *Facilities Use Agreement*. These costs may include, but are not limited to:

- Event set up/clean up
- Custodial support (including paper goods)
- Technical support (electrical connections, etc.)
- Information Technology
- Police Services related to safety and security
- Parking Support Services
- Event Manager
- Support Equipment (e.g. audio visual equipment, furniture)
- Supervision, (labor, removal of notices from kiosks and bulletin boards)
- Utility fees when clearly related to use
- Insurance
- Damage and/or Repairs
- Other related expenses as appropriate

Service Fees shall be deposited into the appropriate fund for the current year's budget. The Accounting Manager or designee will allocate monies received based on costs included in the contract.

3. Cancellation Fees

If an event is cancelled, the requestor forfeits their deposit and the EFC will determine the costs expended by those departments which support the event to the date of cancellation. If costs are incurred, Accounts Receivable will invoice the event requestor.

4. Deposits

The university will require a deposit from an external individual, organization or agency that is requesting the use of university facilities and/or equipment. The deposit will be based on the cost of the facilities being utilized for the event. School districts and government agencies are exempt from having to provide a deposit.

E. Insurance Requirements

The requestor shall, at his/her own expense, obtain and maintain primary insurance during the term of this agreement with the following limits:

General Liability	\$1,000,000 per occurrence
General Aggregate	\$2,000,000
Workers' Compensation	Required under California State Law
Employer Liability	\$1,000,000
Business Automobile Liability:	\$1,000,000 per occurrence (for Owned, Scheduled, Non-Owned, or Hired Automobiles)

In special situations, the Risk Manager or designee may conduct a comprehensive risk identification and evaluation and may amend the standard insurance requirements described above to either higher or lower limits.

The requestor shall furnish a Certificate of Insurance to the university. It shall include an underwriter's additional insured endorsement that provides proof that the insurance is maintained at the required limits. The insurer's rating must be AM Best - A-VII or higher and will be verified utilizing AM Best's on-line rating verification system. The university may in rare instances accept insurance provided by insurers with AM Best ratings lower than A-VII or equivalent. Such acceptance must be made by the Risk Manager or designee.

All Certificates of Insurance (COI) must state the following:

1. That the insurer will not cancel, modify, or change the insured's coverage without thirty (30) days written notice to CSU Channel Islands
2. That the State of California, the Trustees of the California State University, California State University Channel Islands and the officers, employees, representatives, volunteers, and agents of each of them, are included as additional insured's, except for employer liability and worker's compensation insurance.
3. That the State, the Trustees, and the University, including the officers, employees, representatives, volunteers, and agents of each of them will not be responsible for any premiums or assessments on the policy.

In the event that the requestor is a self-insured entity, the signature of an authorized officer, stating that the user has the necessary financial resources to guarantee payment when the law imposes such liability may be accepted in lieu of a Certificate of Insurance. Such a statement is subject to approval by Risk Manager, designee, or other authorized university representative.

II. University Facilities Use Responsibilities

A. Vice President for Finance and Administration shall:

1. Recommend to the President a schedule of facility rental and service rates, deposits, and other charges for use of university facilities, equipment, and services.
2. Annually, have the EFC review the *Facilities Rates and Service Fees Schedule* for recommendations.
3. Annually, have the EFC review the *Events and Facilities Use and Procedural Guidelines* and supporting documentation for revisions or recommendations.
4. Annually have the EFC review the Events Master Calendar (25 Live) training program for revisions or recommendations.

B. Administration Receptionist shall:

1. Forward initial inquiries for use of university facilities from external individuals, organizations and agencies to the TLSEPC.

- C. Transportation Lead/Special Planning Coordinator shall:
1. Respond to the initial contacts from non-university individuals, organizations, or agencies. When appropriate provide the necessary information, guidance and forms to the event requestor.
 2. Enter the event into 25 Live scheduling software for requisite review and approval by the university service providers and, when appropriate, EFC representatives.
 3. Forward the *Facilities Use Agreement* to the appropriate EFC representatives for processing and finalization.
 4. Monitor completion of the agreement process and assist the external requestor as necessary.
 5. When required for external and co-sponsored events, compile facility rental fees and service cost estimates (labor, service, utilities, etc.) from the appropriate university departments.
 6. Ensure submission of required insurance documentation.
 7. Verify that proper clearances are obtained for request to serve alcohol, advertisement, solicitation, amplification, and event signs or barriers.
 8. When applicable, for external university events, the TLSEPC shall submit for processing through the OPC Work Center any documentation for review and approval by the State Fire Marshal. The TLSPEC shall provide a copy to the external requester with the Fire Marshal's decision and/or additional terms and conditions. A copy of the State Fire Marshal's decision shall be attached to the *Facilities Use Agreement*.
 9. Prepare the *Facilities Use Agreement* and secure all required signatures on the document. Collect and process the deposit from the external requestor.
 10. Provide copies of the finalized *Facilities Use Agreement* and other documents to the external requestor.
 11. Inform the requestor that the event is confirmed and scheduled on the events Master Calendar (25 Live).
 12. After the event, generate and submit a final work order, Chargeback Invoice to the Business Services Analyst (BSA) in Police and Parking Service (PPS)

13. When appropriate, generate a request for a refund and submit to the Business Services Analyst in PPS for processing.
14. Maintain records and files of all *Facilities Use Agreements* and *Risk Assessment Documents*.
15. Periodically call for and publish revisions to the *Events and Facilities Use Procedural Guidelines*.
16. Conduct periodic customer satisfaction surveys and make recommendations to improve the *Events and Facilities Use Procedural Guidelines*.

D. Events and Facilities Committee (EFC) shall:

1. Review all external and co-sponsored events submitted in the Master Calendar (25 Live) for approval.
2. Determine that the university facilities are used in a manner consistent with university policy and standards and to ensure that the event will not create unnecessary wear and tear of the facility.
3. When requested, provide estimate of costs for event set up, use of equipment, personnel, clean up, utilities, repairs if required, and other costs for each event through the appropriate representative of the EFC.
4. Give authorization for the use of university facilities and space for internal campus events which are co-sponsored with an external individual, organization and agency.
5. Give authorization for external individuals, organizations and agencies to utilize university facilities and space. Subject to the terms and conditions on the *Facilities Use Agreement*.
6. When applicable, EFC service provider(s) will report on any damage and/or other additional event related costs for invoicing and repairs. The TLSEPC will be notified for external events and co-sponsored events.

E. Division of Academic Affairs Designee shall:

1. Respond to initial contacts for event request from within the division and division co-sponsored events with non-university individuals, organizations, or agencies.

2. Enter the event into the Master Calendar (25 Live) scheduling software for requisite review and approval by the university service providers and, when appropriate, EFC representatives.
3. When appropriate, coordinate and assign the necessary division staff and resources for a co-sponsored event.
4. Submit for approval, to Communication and Marketing, any event publicity and posting with an external individual, organization or agency.

F. Division of Student Affairs Designee shall:

1. Respond to initial contacts for event request from within the division and division co-sponsored events with non- university individuals, organizations, or agencies.
2. Enter the event into the Master Calendar (25 Live) scheduling software for requisite review and approval by the university service providers and, when appropriate, EFC representatives.
3. When appropriate, coordinate and assign the necessary division staff and resources for a co-sponsored event.
4. Submit for approval, to Communications and Marketing, any event publicity and posting with an external individual, organization or agency.
5. The Division of Student Affairs will hold division-wide trainings for staff and students on the event process.
6. The VPSA will be updated weekly on events held within the Division of Student Affairs.

G. Accounting Department shall:

1. Generate and process the invoices upon receiving an Invoice Request Form from the Business Services Analyst from Police and Parking Services (BSA)
2. Upon receiving payment, distribute the revenues to the appropriate departmental accounts.

H. Communication and Marketing shall:

1. Review the proposed event to ensure the activity taking place on the university is in keeping with the positive image of the university.
2. Provide, at their discretion, the official university logo(s).
3. Approve the use of the university's name or likeness on all publicity produced by the user.

I. Police Department shall:

1. Review notifications of all events and perform a risk assessment of events meeting pre-determined criteria. Such assessment will identify security resources required to mitigate the risks associated with the event. The Police Department must be notified of all events to be held on campus.
2. Require written plans from the organizers of those events determined to hold inherent concerns or where documentation is desirable.
3. Provide oversight for public safety of all events held on campus and take intervention measures as appropriate to provide protection for participants and attendees as well as appropriate measures for the security of university property.
4. Determine whether the event is unsafe or that conditions exist that endanger the event attendees or general public. If so determined, they shall request that such conditions be corrected. If the unsafe conditions cannot be corrected or the user fails to comply with the request by the Police Department, the event shall be immediately terminated. Under these circumstances, the user shall not be eligible to receive any form of refund.
5. Review and approve the sale and/or the serving of alcoholic beverages in accordance with the *University Policy on Alcohol*.

J. Transportation and Parking Services shall:

1. When appropriate advise and assist requestor(s) with event parking needs and logistics to minimize the disruption of university operations.

2. Set up signage and/or barricades for events and meetings.
3. Provide cost estimates for the use of parking facilities, shuttle services, and traffic control.
4. Identify and approve the use of specific parking facilities in support of university functions and external events.
5. Generate and process an Invoice Request Form to the accounting department on behalf of the EFC, for all external events.

K. The Risk Manager shall:

1. Perform a liability and risk assessment evaluation for all internal and external university events meeting a pre-determined criteria.
2. Provide advice and guidance to EFC, facility use requestor(s), and others concerning the application of minimum insurance requirements and other liability issues related to events held on campus.
3. Upon request, explain insurance requirements to requestor(s) who plan on utilizing university facilities and/or space.
4. Determine if appropriate for the university to offer event liability insurance through the Special Event Liability Program.
5. When appropriate, and upon completion of a documented risk identification and evaluation, amend standard insurance requirements described herein to use either higher or lower limits or may authorize acceptance of insurance provided by an insurer with an AM Best - A-VII or higher.
6. Sign all *Facilities Use Agreements* for all external University events.

L. Procurement and Contract Services shall:

1. Review all insurance certificates and endorsements to ensure documents comply with the university requirements and limits.
2. Notify the TLSEPC the approval to proceed with the *Facilities Use Agreement*.

M. Operations, Planning, and Construction (OPC) shall:

1. Review event plans to ensure that university facilities or space are used in a manner consistent with university policy and standards.
2. Determine if the use of a specific university facility or space is appropriate for the intended use and in a manner to prevent damage and unnecessary wear and tear.
3. In consultation with the appropriate EFC representative, determine if parameters of the proposed event exceed the university's authority to approve the event in compliance with the Fire Code. When applicable, the EFC will obtain advance approval of the State Fire Marshal by submitting the request through the OPC Work Center. The OPC Work Center shall notify the appropriate EFC representative of the State Fire Marshal's decision.
4. On an annual basis update and provide the service fees for all university facilities including the cost for additional support staff for university events.
5. Provide personnel as required to staff an event. This may include set up, clean up, or additional assistance during events and repair work as may be needed following events. All time and any overtime incurred will be charged to the requestor.
6. Provide reports on any damage and/or other event related costs that exceed original estimates.
7. Provide construction and maintenance schedules, updates and block usage of facilities and space as necessary through the Events Master Calendar (25 Live).

N. Academic and Information Technology shall:

1. Provide specialized audiovisual equipment for on-campus events as appropriate.
2. When appropriate, provide an estimate for all costs for set-up, use of equipment, personnel, repairs if required and other costs for each event.
3. Provide personnel as required to staff an event.

III. Definitions

- A. Academic Events Coordinator: Individual in the Division of Academic Affairs, office of the Dean of Faculty, who coordinates and processes requests through the use of 25 Live scheduling software.
- B. Co-Sponsored Event: An event co-sponsored with an external individual, organization or agency with a university department, university auxiliaries, or other recognized university clubs or organizations. Co-sponsorship is appropriate when there is a clear connection with or contribution to the university. The educational mission of the co-sponsoring university affiliate must be enhanced by the co-sponsored event. The university affiliate will need to provide support staff and/or other resources.
- C. Transportation Lead/Special Events Planning Coordinator (TLSEPC): Individual in Police and Parking Services Department, who assists members of the university and community in making arrangements to use University facilities for events.
- D. Events and Facilities Committee (EFC): Consists of representatives from the various university departments, faculty and student government. The committee ensures compliance with the *Events and Facilities Use Procedural Guidelines* or any administrative policies that are applicable by the university community or any external individual, organization, or agency.
- E. Events & Facilities Use Request Form: The initial document used to request the utilization of university facilities. This form is only for external events and will be submitted to the Transportation Lead/Special Events Planning Coordinator at Police and Parking Services.
- F. External Events: Activities held in university facilities (including those facilities which have been delegated or assigned to university academic programs, departments, and auxiliary organizations) that anticipate off-campus attendance and are not typically scheduled through the academic scheduling system.
- G. Events Master Calendar (25Live): The system program in which event requests are entered, and requisite departmental and divisional approvals are processed and maintained. Approved events are entered into the events calendar for viewing of university activities by the community.

- H. Facilities Use Agreement: The document used by the Events and Facilities Committee that contains all terms and conditions for the use of facilities and space by an external individual, organization, or agency
- I. Internal Events: Scheduled instruction, scholarly and creative activity, testing, and administrative meetings, which includes recitals, performances, concerts, exhibitions, intercollegiate athletic events, or lectures submitted by the Division Designee as part of its course offerings and educational mission.
- J. External Individual, Organization or Agency: Any external individual, organization or agency that holds an event or meeting on the university. As defined in SUAM, the following types of groups may use university facilities: governmental agencies; nonprofit, charitable, educational, or character building organizations; and groups or individuals who will use the facility for education or non-commercial use. Student organizations not recognized by the Division of Student Affairs are considered non-university organizations for purposes of these guidelines.
- K. Procurement and Contract Services: The department within the Division of Finance and Administration which verifies and approves insurance documentation, licenses, for the Events and Facilities Committee.