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| Procedure Name: | Event Management Standards |
| Originating/Responsible Department: | University Communications |
| Approval Authority: | Senior Management Committee |
| Date of Original Policy: | NA |
| Last Updated: | January 2005 |
| Mandatory Revision Date: | January 2010 |
| Contact: | Director, University Communications |

Procedure:

The Department of University Communications will provide event management services (A, B or C, D) that corresponds with an event's tier (1, 2, 3, 4). The Department reserves the right to modify its level of involvement and accountability depending on workload.

Guidelines:

EVENT MANAGEMENT SERVICES

Category A:

- i. Acting on behalf of the event host, the Department of University Communications is fully responsible and accountable for the planning, implementation and evaluation of all events in this category, including the establishment of goals and objectives, methods of execution, budget management; minimum standards and consistency requirements; and
- ii. The Special Events team works with the relevant 'host' departments as required, in order to ensure that responsibility and authority for all event elements are clear and mutually agreed upon; and
- iii. The Department of University Communications has the necessary authority over personnel, databases and other systems.

Category B:

- i. The Department of University Communications requires minimum standards and consistency requirements be met for all events in this category; and
- ii. D.U.C. provides regular assistance and consultation regarding event planning and execution to 'host' Departments, but D.U.C. is not ultimately responsible for the execution and results of these events; and
- iii. D.U.C. makes available generic event planning tools including templates, event checklists, and sample budgets that can assist campus event planners with their event needs.

Category C:

- i. The Department of University Communications recommends minimum standards and consistency requirements be followed for all events in this category; and
- ii. D.U.C. provides informal assistance and consultation regarding event planning and execution to 'host' Departments, but D.U.C. is not ultimately responsible for the execution and results of these events; and
- iii. D.U.C. makes available generic event planning tools including templates, event checklists, and sample budgets that can assist campus event planners with their event needs.

Category D:

- i. The Department makes available generic event planning tools including templates, event checklists, and sample budgets that can assist campus event planners with their event needs.

TIERS ***Tier 1 event:**

- ii. President or Chancellor are hosting or extending the invitation; and/or
- iii. Event has a direct link to the mission and strategic themes of the University; and/or
- iv. Target audience is important to the University in achieving its strategic goals; and/or
- v. Event is very important to the overall reputation; credibility and image of Carleton and/or the image of the University would be compromised if the event were not executed successfully.

Tier 2 event:

- i. Vice President is hosting and/or President is in attendance; and/or
- ii. Event is important to the mission and strategic themes of the University; and/or
- iii. Target audience may be important to the University in achieving its strategic goals; and/or
- iv. Event is somewhat important to the overall reputation, credibility and image of Carleton;

Tier 3 event:

- i. Dean, Department Chair or Director is hosting; and/or
- ii. Target audience is primarily internal and/or is targeted to a specific external audience specific to the faculty or department; and/or
- iii. Event is supported and/or sponsored by the University but is not an event in the name of the institution as a whole; and/or
- iv. Event is not otherwise within the definition of Tier 1 or 2.

Tier 4 event:

- i. All other events (primarily internal in nature)

* The President has the authority to change an event's tier.

Minimum Event Standards:

1. Event administrators of Tier 1 and Tier 2 events are required to submit an Event Work Plan to a member of the Special Events Team, a minimum of one month prior to their respective event. (Downloadable templates are available by visiting <http://www.carleton.ca/duc> or by contacting a member of the team).
2. Event administrators of Tier 1 and Tier 2 events must advise Senior Executive of their event, by email, as soon as the event is confirmed. They must then follow-up with Senior Executive, as well as members of the Board of Governors and members of the Senate with an official printed or email invitation, a minimum of three weeks in advance of the event.
3. Event administrators of Tier 1 and Tier 2 are required to offer a briefing to the event host (i.e. the President or the Vice-President) a minimum of 72 hours before the event.
4. Invitations for Tier 1 and Tier 2 events are required to include provisions for guests to RSVP their attendance.
5. All events hosted by Carleton University must be posted on [Events@CU](#), the University's web based event calendar system, a minimum of three weeks prior to the event.
6. Event administrators of Tier 1 and Tier 2 events are required to present their work plan and to submit post-mortem observations and recommendations to the Events Committee.

Purpose:

The Department of University Communications is responsible for developing University-wide policies, procedures, and guidelines, to ensure a minimum standard and common visual identity for all official University advertising, publications, promotional materials, Web sites, events, and media relations' activities. The Department is charged with ensuring that all external communication components meet stated objectives with respect to consistency of message and design, accuracy of information, quality of presentation, image projected, tone, style, price and timeliness.

Scope:

This policy applies to all University departments and units.

Process:

Event organizers can contact a member of the Special Events Team to determine the event's tier and the level of event managements services to be provided by the Department of University Communications.

Special Events Co-ordinator
Tel: 520-2600, ext. 8708

Manager, Public Affairs
Tel: 520-2600, ext. 1406

Media and Special Events Officer
Tel: 520-3600, ext 1391

Email: events@carleton.ca

Contacts:

Director, University Communications; Manager, Public Affairs; Special Events Co-ordinator,
Media and Special Events Officer

Links to related Policies:

Publications Policy

<http://www2.carleton.ca/secretariat/ccms/wp-content/ccms-files/Publications.pdf>

EVENTS MANAGEMENT: DUC SERVICES CORRESPONDING WITH EVENT TIER (INCLUDING KNOWN EXCEPTIONS)

| | | Event Management Service Level | | | |
|------------|---|---|---|--|---|
| | | A | B | C | D |
| Event Tier | 1 | Institutional news conferences and media events Community Breakfast series Significant research award ceremonies, funding announcements Campus building openings Employee Recognition Day Others as determined by President or VPs | Convocation Annual Scholarship Dinner Major Donor Events | President; Christmas Luncheon President's Teaching and Research Awards Reception | |
| | 2 | | Carleton University Lecture Series Alumni Leadership Luncheon Series Internal research award ceremonies, funding announcements Faculty, staff and student recognition events | Kroeger College Leadership Forum and Awards Banquet | |
| | 3 | | Faculty Club Events | Faculty or Departmental events and/or lectures CUAG exhibitions Staff or Faculty events Alumni branch or chapter events Other donor related events | Orientation Week, Charity Ball, Engineering Week, Kosmic |
| | 4 | | | | Social or club events, private parties Conferences |