Events at the University of South Carolina School of Law are a wonderful opportunity to showcase the exceptionally talented faculty, students, graduates and staff that are part of our community. In many cases, world-reknowned leaders of the bench, bar and business come to our campus to share their thoughts and ideas on a myriad of subjects related to the law.

Events on our campus signal to the wider community the depth of the scholarly work accomplished here and the quality of the School of Law as an institution. As such, it is important that we maintain certain standards when planning events. This manual has been developed to assist both faculty, students and staff in the development of a comprehensive program and to provide some resources for additional information.
School of Law Events Management Services

The purpose of the office of Events Management is to provide professional meeting and event planning services and event marketing for student activities and events, faculty led conferences and symposia, institutional events such as Commencement, and events associated with alumni relations and development.

The Events Manager partners with School of Law administrative staff, faculty liaisons, and student leaders to ensure events:

- are planned in a manner consistent with the intention and purpose of the event,
- represent the University and the School of Law favorably,
- are kept within a prescribed budget,
- are carried out to ensure adherence to state and University policies and procedures (and to provide guidance to administrative staff, faculty liaisons, and student leaders).

**Business and Finance Policy for Personal Consumption Items** (source is any kind of state funding) BUSF 7.05 Rules and Conditions: Functions held on the Columbia campus must utilize the University food service contractor except for functions self catered and less than $500 in total cost. Catered is defined as a predetermined menu for all participants at a function or meeting.

**Event Planning Services:**

1. Event concept development and assistance
2. Assist with budget creation, provide ongoing to-date information on finances to event owner; coordination with Assistant Dean for Administration on all items prior to expenditure for funding source and approval
3. Marketing, Registration, Signage (electronic and printed materials; in coordination with Director of Communications and Director of Web Services)
4. Venue selection, catering, ground transportation, reserved parking, speaker travel, AV equipment, videography and podcasting coordination
5. Coordination with law school facilities supervisor to ensure a clean, attractive meeting area, clean and refreshed restrooms, logistics for room set-up, and clean up after event
6. Fee collection to include online transactions (online fee collection using USC Marketplace and Foundation approved vendor), bill payment, and financial close out after event
7. Registration systems using relational database to provide for enrollment management, receipting services, nametag production, participants lists, correspondence
8. CLE application and reporting, and Uniform Certificate of Attendance
9. Coordination with Information Services for mailing lists
10. Event related travel authorizations and reimbursements
11. Procurement of all direct consumables (pens, pads of paper, folders, gifts)
12. Printed and electronic materials to be distributed to all participants
13. Rental items (tables, chairs, vehicles, sound equipment, stages, dance floor)
14. Diagrams for logistics (seating, room sets, audience flow patterns)
15. Guest management for VIPS who may need assistance while they are visiting us to include gift bags, advance event materials placed in guest’s room prior to check-in
16. Present at event to ensure event runs smoothly, working closely with venue/vendors

Vendors and service providers must be fully licensed and insured, and a copy of a W-9 is required in order to process check requests for payment.

Licensed providers must be contracted for events at which food and beverage, particularly alcohol, will be served.
Event Planning Checklist

- Budget established to include Sponsorship Discussion
  Meals outside of the actual program need to be discussed with
  the Assistant Dean for Administration prior to expenditure
  due to University policies on funding such activities.
- Date identified
- Establish timeline
- Requests for Proposals for and task completion of services:
  Space/Venue
  Hotel accommodations for speakers and/or participants
  Food and Beverage
  Rentals (audio visual equipment, technicians, tables and
  chairs, linens, plants)
  Reserved campus parking or valet for off-campus events
  Photographer, Videographer, Entertainment
  Security

  Proposal collection includes receiving copies of W-9, business
  license or other specialty license as required by USC policy or
  law for service, proof of insurance as required by USC policy
  or law
- Marketing, Signage and Activity/Event Documents
- Set up registration system to include online revenue collection
  as necessary
- Event related Travel authorization preparation and reimburse-
  ment process for speakers and/or participants
- Apply for permission to serve alcohol
- All contracts reviewed and authorized by appropriate School of
  Law Dean
- All contracts sent with completed University Contract Approval
  Form to the Office of the General Counsel
- Track revenue and expenses in Excel, and keep original and
  scanned copies of all paperwork
- Coordinate services with law school support areas (business
  manager, building supervisor, custodial services, faculty support
  if applicable)
- Record and document participant registration using Excel or
  database to provide for 1) enrollment tracking to establish
  numbers for direct consumables, 2) enrollment reports to pay
  invoices, 3) name tag production, and 4) tracking interest for
  event or activity
- Always plan for special needs such as dietary restrictions and
  reasonable accommodations in compliance with the Americans
  with Disabilities Act
- Identify staff to service event operation (hosts, registration ta-
  ble, CLE monitor); provide schedule to all working event
- At event: verify all speakers are present, double check room-
  sets, AV, food and beverage; provide direction to photographer
  and videographer; check on registration/CLE monitor
- After event: review and process all invoices, prepare prelimi-
  nary financial statement for review by Assistant Dean for
  Administration; if available, review participant activity/event
  evaluations
Events Management

Event Budget Worksheet

Revenues or Allocated Budget
Budget allowances are established in consultation with the Dean’s office. Once a budget has been allotted, consult with the Events Management office to establish a timeline, a check list for tasks to be completed, and to identify vendors and law school service areas that will support the event. Depending on the funding source (state vs sponsored), the policies for procurement of services will vary.

Establishing and Collecting Fees
In order to establish fees for events, it is of particular importance to identify supplies and materials that are to be directly consumed by the participants to include: marketing, food and beverage, program materials, supplies and rentals, and special services associated with the event (side trips, ground transportation, entertainment).

Note that if you are planning to collect fees from participants, you will need to provide a completed event budget to justify the fees, and to plan for which expenses the fees will be used. Review and approval of fees to be collected for some programs and events must come from the Board of Trustees. Please contact the Assistant Dean of Administration at the budgeting phase of your event to clarify if you need to seek this permission. Currently, the Board of Trustees reviews requests once each calendar year.

<table>
<thead>
<tr>
<th>Revenues or Budget</th>
<th>$</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expenses</td>
<td></td>
</tr>
<tr>
<td>Honorariums</td>
<td>$</td>
</tr>
<tr>
<td>Lodging</td>
<td>$</td>
</tr>
<tr>
<td>Travel</td>
<td>$</td>
</tr>
<tr>
<td>Meals</td>
<td>$</td>
</tr>
<tr>
<td>Marketing</td>
<td>$</td>
</tr>
<tr>
<td>Printing</td>
<td>$</td>
</tr>
<tr>
<td>Presentation(s)</td>
<td>$</td>
</tr>
<tr>
<td>Audio visual</td>
<td>$</td>
</tr>
<tr>
<td>Food and Beverage</td>
<td>$</td>
</tr>
<tr>
<td>Rentals</td>
<td>$</td>
</tr>
<tr>
<td>Other</td>
<td>$</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>$</td>
</tr>
<tr>
<td>Surplus/Deficit</td>
<td>$</td>
</tr>
</tbody>
</table>

UNIVERSITY OF SOUTH CAROLINA
School of Law
Promoting Your Event
The law school Director of Communications should be consulted if you are planning an activity, new academic program or event to assist you in planning for promotion to include:
- Printed materials including invitations, programs and posters;
- Posting of information to the law web;
- Posting to the Law School’s social media sites;
- Media relations

University Branding and Templates
University Communications has established a toolbox of resources for electronic and printed information that is to be used for any activity or event sponsored by the institution. There are specific protocols and specifications, and select vendors are on an approved list that already know the parameters for production. Coordination with the Director of Communications for electronic and printed materials is required in order to be in compliance with University Communications standards and policies.

Information Technology
The office of Information Technology is here to support you prior to, during and after an event. The Director of Web Services works in cooperation with the Director of Communications, and IT staff work with appropriate personnel to ensure technology resources are available for your use. Please consult the Assistant Dean for IT to discuss videotaping, podcasting, streaming and other technology needs of your event. Some meeting areas within the School of Law require equipment to be rented and operated by specialized technicians.

Key Contacts for Institutional Services
Audio visual equipment, videography - University Instructional Services: Mike Wingate (803-777-3432; MWingate@mailbox.sc.edu)
Catering - Sodexo: Julie Livingston (803-777-7919; office of Events Management can coordinate and negotiate on your behalf)
First Responders: Ken Corbin (803-777-7019; KCorbin@mailbox.sc.edu)
Parking - University controlled parking lots: http://www.sc.edu/vmps/park.html#visitor
Photography: Jason Ayer (803-777-3257; JAyer@mailbox.sc.edu) available M-F 8:30 am - 5 pm*
Printing Services: http://printing.sc.edu/contact.asp or 803-777-5146

*Please contact office of Events Management for list of approved freelance photographers for weekend and after hours needs.
<table>
<thead>
<tr>
<th>Room #</th>
<th>Capacity</th>
<th>Space by Capacity/Type</th>
<th>Technology</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>235</td>
<td>17</td>
<td>Small</td>
<td>No technology</td>
<td>Tables and chairs</td>
</tr>
<tr>
<td>332</td>
<td>X</td>
<td>Small</td>
<td>None</td>
<td>Reserved - Clinics (Greene St. side)</td>
</tr>
<tr>
<td>334</td>
<td>26</td>
<td>Small</td>
<td>Level 1</td>
<td>Tables and chairs</td>
</tr>
<tr>
<td>335</td>
<td>30</td>
<td>Small</td>
<td>No technology</td>
<td>Tables and chairs</td>
</tr>
<tr>
<td>337</td>
<td>X</td>
<td>Small</td>
<td>None</td>
<td>Reserved - Legal Writing (Green St. side)</td>
</tr>
<tr>
<td>338</td>
<td>26</td>
<td>Small</td>
<td>Smart room (computer; internet; DVD; VHS; VCR; Microsoft Office)</td>
<td>Tables and chairs (Devine St. side)</td>
</tr>
<tr>
<td>230</td>
<td>85</td>
<td>Medium</td>
<td>Smart room (computer; internet; DVD; VHS; VCR; Microsoft Office)</td>
<td>Tiered seating (Greene St. side)</td>
</tr>
<tr>
<td>231</td>
<td>56</td>
<td>Medium</td>
<td>Smart room (computer; internet; DVD; VHS; VCR; Microsoft Office)</td>
<td>Tables and chairs</td>
</tr>
<tr>
<td>333</td>
<td>80</td>
<td>Medium</td>
<td>Smart room (computer; internet; DVD; VHS; VCR; Microsoft Office)</td>
<td>Tiered seating (Greene St. side)</td>
</tr>
<tr>
<td>344</td>
<td>58</td>
<td>Medium</td>
<td>Smart room (computer; internet; DVD; VHS; VCR; Microsoft Office)</td>
<td>Tiered seating with movable chairs (Greene St. side)</td>
</tr>
<tr>
<td>345</td>
<td>58</td>
<td>Medium</td>
<td>Smart room (computer; internet; DVD; VHS; VCR; Microsoft Office)</td>
<td>Tiered seating with movable chairs (Devine St. side)</td>
</tr>
<tr>
<td>135</td>
<td>112</td>
<td>Large</td>
<td>Smart room (computer; internet; DVD; VHS; VCR; Microsoft Office)</td>
<td>Tiered seating (Devine St. side)</td>
</tr>
<tr>
<td>138</td>
<td>102</td>
<td>Large</td>
<td>Smart room (computer; internet; DVD; VHS; VCR; Microsoft Office)</td>
<td>Tiered seating (Greene St. side)</td>
</tr>
<tr>
<td>236</td>
<td>110</td>
<td>Large</td>
<td>Smart room (computer; internet; DVD; VHS; VCR; Microsoft Office)</td>
<td>Tiered seating (Devine St. side)</td>
</tr>
<tr>
<td>239</td>
<td>24</td>
<td>Courtroom</td>
<td>Smart room (computer; internet; DVD; VHS; VCR; Microsoft Office)</td>
<td>Bench style seating (2 sections with 4 rows in each to providing seating for 40)</td>
</tr>
<tr>
<td>336</td>
<td>20</td>
<td>Courtroom</td>
<td>Smart room (computer; internet; DVD; VHS; VCR; Microsoft Office)</td>
<td>Moot Court</td>
</tr>
<tr>
<td>160</td>
<td>228</td>
<td>Main Auditorium</td>
<td>Smart room (computer; internet; DVD; VHS; VCR; Microsoft Office)</td>
<td>Restricted access</td>
</tr>
<tr>
<td>160A</td>
<td>112</td>
<td>Wing (Devine St. side)</td>
<td>Smart room (computer; internet; DVD; VHS; VCR; Microsoft Office)</td>
<td>Restricted access</td>
</tr>
<tr>
<td>160B</td>
<td>112</td>
<td>Wing (Greene St. side)</td>
<td>Smart room (computer; internet; DVD; VHS; VCR; Microsoft Office)</td>
<td>Restricted access</td>
</tr>
<tr>
<td>302</td>
<td>24 - 50</td>
<td>Conference Room</td>
<td>Internet and phone connection; large flat panel</td>
<td>Capacity determined by room set</td>
</tr>
<tr>
<td>303</td>
<td>flow</td>
<td>Faculty Lounge</td>
<td>None</td>
<td>Buffet service area or small standing reception function space</td>
</tr>
<tr>
<td>Lobby</td>
<td>165</td>
<td>Greene St. side; open</td>
<td>Rental requirements for AV, tables and chairs, fees associated with set-up</td>
<td>Large general events</td>
</tr>
</tbody>
</table>

**Room requests** are routed through the office of the Academic Dean. Space at the University of South Carolina is available to University departments at no cost and to non-University entities for a fee. Process for leasing University space includes an executed lease agreement and proof of insurance to be reviewed and approved by the Board of Trustees, the Office of the Provost, and the Office of Risk Management. Space fee schedule is available in the office of the Assistant Dean for Administration.
The Business of Events

University policies and procedures are available on the web at http://www.sc.edu/policies/policiesbydivision.php#BUSA, and include policies under Business Affairs (BUSA) and Business and Finance (BUSF). Below are processes of events that we typically encounter:

Authority to Sign Contracts (BTRU 1.04)
Signatories of the University are: the President, the Secretary of the Board of Trustees (and others at the Secretary’s discretion with permission given in written form), and attorneys within the office of the General Counsel for services generally in connection with event related expenses. Contracts are negotiated with the vendor and submitted in triplicate to the Dean with a completed Contract Approval Form for his review and signature. The package is then sent to the Office of the General Counsel for the contract review and signature process to begin. The length of time varies in duration for this process, and event owners should allow 4-6 weeks to receive the signed package. To fully execute the contract, the package requires the vendor’s signature, and filing of the now fully executed document shall be made in the Office of the General Counsel, the Assistant Dean for Administration at the School of Law and the third copy should remain with the vendor.

Speakers and Honoraria
Contractual services should not be made with individuals before obtaining the Dean’s approval. Once you have approval, please meet with the Assistant Dean for Administration to ensure that University policy is followed in acquiring documentation in order to pay honoraria and/or to cover travel expenses. International travel is of particular importance in gathering all required documents (VISA, letter of offer for travel and academic purpose) as this greatly affects the ability to establish a travel authorization and purchase international airline tickets.

Travel Authorizations (TA)
In order to pay travel expenses, whether as a reimbursement to an individual or to pay a vendor directly, like a hotel, a travel authorization must be on file in the USC Controller’s office Travel Section prior to the beginning travel date. Travel authorizations are completed through an online administrative portal, and are to be completed by individuals who have password access to this system. The Assistant Dean for Administration typically is the person to sign travel authorizations to ensure accuracy and that policy is being followed. All expenses are to be reasonable, and you are advised to review University travel policy to avoid confusion (BUSF 1.00).
Travel Reimbursement Vouchers (TRV)
Travel reimbursement vouchers are to be processed within 45 business days of the end of the travel, with original receipts required to be attached to the TRV. When possible, the individual who is to receive the reimbursement is to sign a TRV for personal reimbursement and then additional TRVs for vendors such as a hotel. In order to reimburse expense for airfare, printed airline itineraries with the name of the traveler as it appears on the travel authorization and the ticket cost information are acceptable. Boarding passes are not valid forms of airfare receipts. In rare cases where the traveler is not available to sign the TRV, written documentation must be provided designating another individual to complete and sign the TRV. Written documentation must accompany each individual TRV. The documentation should explain why the traveler is unable to sign and must be signed by the appropriate dean.

Accepting online revenue
The Events Management office serves as the online revenue collection unit within the School of Law for all fee-based events and activities unless otherwise authorized by the Assistant Dean for Administration.

Please note that it is against USC and University Foundations policies to collect credit card and bank routing/account numbers. A purchaser is to perform the online transaction, and University employees are not permitted to complete the transaction for an individual.

University computers, tablets, cell phones and other web-connected devices are not to be used for a purchaser to perform the online transaction to ensure the purchaser’s credit card/bank information cannot be stored in the memory of the device. Please contact Events Management to request loaner equipment check-out through the Office of the USC Bursar and University Foundations.

USC Market Place - University Storefront
Under the supervision of the office of the University Bursar, the office of Events Management serves as the Law School Storefront enabling online collection of revenue to be deposited into a University controlled fund (not University Foundations). Set up and making available a product or in this case an event takes approximately 14 business days, as the Bursar’s office must review, approve and activate each product or event offering.
University of South Carolina MarketPlace (The TouchNet® hosted application) provides the University of South Carolina System with a Purchasing Card Industry (PCI) compliant solution for accepting on-line payments. The University of South Carolina System MarketPlace provides a secure environment to connect buyers and sellers electronically, making it easy for students, parents, alumni and the community to do business with the University. The University of South Carolina MarketPlace allows departments to easily create online storefronts, with the review and approval of the Office of the Bursar, to sell products or accept online payments from an existing University of South Carolina eCommerce web site.

**Eventbrite - University Foundations selected vendor for Online Fee Collection**

Under the supervision of the Accounts Receivables office of the University Foundation's office, the office of Events Management serves as the Law School Storefront enabling online collection of revenue to be deposited into a University Foundation controlled fund (not USC accounts). For each event an application for online event ticket sales is to be completed and submitted to the Accounts Receivables contact within University Foundations. It is the Accounts Receivables office that will set up the online event in Eventbrite so that control of the online revenue collection is primarily held by University Foundations. Event owners are advised to allow 4-6 weeks for the initial set-up to be carried out by University Foundations.

**Deposits**

No monies are to be collected on behalf of the University or the School of Law without authorization by the Assistant Dean for Administration or other appropriate law school dean. Deposits cannot be held, and should be made in the same business week that the cash/check is received. Deposits for events are processed through the Events Management office unless otherwise authorized by the Assistant Dean for Administration.

Deposits for online revenue received through the TouchNet system (USC Bursar’s office) are done automatically. An end date must be established for each event collecting online revenue, and timely transfer of revenue for each event must be requested through the office of the Assistant Dean for Administration. Delay in transferring funds will cause confusion in allocating to the appropriate law school fund.

The first step in processing cash and check payments for deposit into USC funds is to prepare a receipt for each transaction using a receipt book system, and the receipt book is available through the office of the Assistant Dean for Administration. A University deposit transmittal
form is available in the Events Management office and through the Assistant Dean for Administration.

Deposits for online revenue received through the Eventbrite system (University Foundation's office) are based on the Foundation account information provided on each application for online event tickets sales.

Cash and check deposits for University Foundation funds do not require individual receipts. A University Foundations deposit transmittal form is available in the Events Management office and through the Assistant Dean for Administration.

**Refunds**

Refunds for online revenue received through the TouchNet system are handled by the USC Bursar's office, and are initiated by the Events Management office upon receipt of a written request of refund by the event owner. Merchant fees are NOT refundable so you may wish to consider always including a non-refundable processing fee when the purchaser cancels his/her participation. TouchNet refunds are in the form of credit back to the card the individual used to make the initial payment.

Refunds for online revenue received through the Eventbrite system are processed by the Events Management office upon receipt of a written request of refund by the event owner. As of July, 2013, Eventbrite does not assess a fee for monies refunded. Please verify with each online event ticket sales agreement executed with University Foundations. Eventbrite refunds are in the form of credit back to the card the individual used to make the initial payment.

Refunds for cash/check payments whether USC funds or University Foundations funds are in the form of a check only. The Events Management office will initiate refund requests upon receipt of written refund request. The written request is required by USC and University Foundations in order to process a refund. Please allow 4-6 weeks for refund processing.