Event Planning Best Practices  
(Hints to facilitate the process)

- If events happen annually, obtain a schedule of the events to establish a cadence and avoid last minute issues.
- Attempt to work with the hotel/facility as early as possible. If hotel/facility is not in vendor database, it will take additional time for the BSC/FTC and Procurement Services to obtain the supplier information form, W-9 or W8BEN/W8BEN-E (for foreign entities).
- Obtain a contact person's name, and email address of the individual at the hotel/facility that you have been working with. Ensure a contract is obtained along with the event quote.
- To identify there is concurrence on the terms and conditions requested by the hotel, the unit (end customer) should initial the hotel/facility contract in margin, date and add their Netid. Do not send the contract directly back to the hotel/facility without Procurement Services review and signature.
- Send the contract and all required documentation (i.e. addendum, quote, supplier information form, W-9, ACH form etc., as appropriate) to your BSC/FTC as soon as available.
- The Buying Manual prohibits the total payment for an event upfront. If the event is in less than 10 days and the hotel/facility will not move forward without payment, work with your BSC/FTC. You will need to obtain an invoice for the negotiated deposit amount up to $10,000.
- If the event (rooms plus catering) involves the NYC Cornell Club, no purchase order is needed (pay on BSC/FTC p-card). If it is an individual traveling on business utilizing the NYC Cornell Club, it should be treated as business travel and follow the Travel policy (reimburse or advance). This does not apply to other Cornell Clubs across the country.
- Newly created Section 307 of the Buying Manual governs the transactions that can be put onto a BSC/FTC p-card. This new section of the Buying Manual formalizes the previous Group Travel MOU available to FTC/BSC’s.
- To determine if the contract has been sent to the hotel/facility, review the “related documents” tab of the “I Want” document or contact your FTC/BSC.

Note: a more extensive version of this checklist is available with the FTC/BSCs to assist with handling the transactions in an expeditious manner. This is due to the fact that the campus event planners do not have signature or transaction authority that FTC/BSCs and Procurement Services have in place.