



Academic Events Policy

1. Purpose

California Institute of Integral Studies (CIIS) broadens its reputation, student educational opportunities, and revenue stream when our programs host activities such as conferences and symposia that draw in external audiences. This policy provides more equitable opportunities for programs to host, and fosters the success of these activities by assuring that, before they are launched, an analysis of their needs has been made in relation to our resources.

2. Policy Approver

President

3. Date of Most Recent Review

May 2021

4. Offices Directly Involved in Implementation of Policy

- a. Development (*potentially*)
- b. Facilities and Operations
- c. Finance
- d. Human Resources (*potentially*)
- e. Library (*potentially*)
- f. Diversity and Inclusion (ODI) (*potentially*)
- g. Marketing and Communications
- h. Provost's Office
- i. Public Programs (P2) (*potentially*)

5. Scope

This policy applies to activities as defined in point 7.a. and that are held virtually or in-person at either the Mission and/or Arkansas campuses. It does not apply to activities held at clinics or at facilities rented by CIIS. It does not apply to activities hosted by external parties invited to campus by programs.

6. Relevant Laws and CIIS Policies

- a. Federal student worker regulations
- b. California Fire Code

- c. CIIS Room Scheduling Policy

7. Definitions

- a. *Activity* – An event, such as a conference or symposium, hosted by an academic program or Office of Diversity & Inclusion (ODI) which:
 - i. is not an academic requirement; and
 - ii. invitations to which extend to populations beyond CIIS students, faculty, or staff; and
 - iii. due to the amount of time needed for preparation, must have its rooms reserved before the relevant semester’s class schedule is built, or webinar arrangements made in advance.
- b. *Application* – The *Academic Event Application*
- c. *Conference* – An activity taking place over two or more days
- d. *Event* – A one-day, all-day activity
- e. *Lead* – the CIIS faculty member, or director in charge of the activity

8. Funding

- a. The budget line for all activities is held in the Provost’s Office. Activities budgets are aggregated under one line so that profit from some activities can underwrite others. Leads remain responsible for establishing and following budgets for their own activities.
- b. Revenue is generated only through entrance fees, grants and/or donations. Programs must work with Development to obtain such grants and donations.
- c. Each activity must cover all of its expenses through its own revenue. Shortfalls must be pre-approved and are covered by revenue from the Provost’s Office budget line.
- d. Income is administered by the Finance Office, not the program.
- e. If the activity uses Namaste Hall during a weekend, which is normally reserved for Public Programs (P2), an additional \$6,000 per day must be included as an expense to defray P2’s lost revenue.

9. CIIS hosts a maximum of three conferences and three events per academic year.

10. Approval Authority and Deadlines

- a. Applications are submitted by the Lead to the Provost a year-and-a-half before the activity is to take place. The Provost may invite the Lead to discuss the application.
- b. The Provost evaluates Applications, ranks those endorsed, and forwards them all at once to the President for approval a year-and-three-months before the activity

takes place.

- c. The President approves or rejects Applications one year before the activities take place.

11. Minimally Required Application Information

- a. The name of the Lead.
- b. The purpose of the activity, how it aligns with the mission of CIIS, the standards defining the activity's success, and the methods to assess this.
- c. A budget that lists all expenses (including contingencies), projected revenue, and entrance fee amount(s).
- d. The target market and a marketing plan; Marketing and Communications is to be involved.
- e. A projected range in the number of attendees and an explanation of how this was determined (the minimum number must cover all costs).
- f. The projected number of rooms required, and any requests for specific rooms, if on campus, or webinars and their capacity, if virtual.
- g. A cancellation policy, including a cancellation deadline.
- h. The hospitality and logistical requirements for presenters.
- i. Audio/Visual equipment requirements, if on campus.
- j. A timeline that maps all of the tasks needed to produce the activity.

12. Responsibilities of the Lead

- a. Creating and managing the budget.
- b. Creating the agenda.
- c. Inviting speakers.
- d. Working with Marketing and Communications to promote the activity.
- e. Setting a cancellation deadline; assessing viability based on projected attendees.
- f. Working with the Library to obtain content licenses, if necessary.
- g. Creating a staffing schedule.
- h. Overseeing the execution and documentation of the activity.
- i. Surveying attendees, assessing outcomes, and reporting findings to the Provost, who will use this information to evaluate future Applications.

13. Staffing

- a. The work Program Managers/Coordinators do on activities should not interfere with their regular responsibilities.

- b. The work student workers do on activities does not qualify for academic credit and does not fulfill course or degree requirements, including for independent study.
- c. Contractors, adjunct administrators, and temps may be hired and their wages should be included in the budget.



California Institute of Integral Studies

ACADEMIC EVENT APPLICATION

This application is used by an academic program or the Office of Diversity and Inclusion to propose hosting an event virtually or on campus for external audiences, such as a conference or a symposium. Leads submit applications to the Provost, the Faculty Executive Committee (FEC), and the Vice Presidents who evaluate them for mission-fit and financial feasibility. Applications they endorse are then evaluated by the President for final approval. Up to six events (three conferences and three all-day events) are hosted per academic year. For full information, see the *Academic Event Policy*.

APPLICATION CRITERIA

The answers to *all* of the questions below must be yes before an application can be submitted.

Is it at least a year-and-a-half before the event?

Has a Lead been identified?

The Lead is responsible for a) creating and managing the budget; b) creating the activity's agenda; c) inviting speakers and overseeing their accommodations; d) working with Marketing and Communications to promote the activity; e) setting a cancellation deadline and assessing viability based on projected attendees; f) creating a staffing schedule; g) overseeing the execution of the activity; and h) surveying attendees, assessing outcomes, and reporting findings to president, the vice presidents, and FEC which will use this information when evaluating future applications.

Will the event attract 60 -100 attendees outside CIIS from the larger public?

Are there personnel, either in the program or to be contracted, that have extensive event planning, production, and management skills?

Has a preliminary budget been created?

EVENT INFORMATION

1. Name of Lead Submitting Application:

2. Lead Name:

3. Lead Job Title:

4. Lead's Phone:

5. Lead's Email:

6. Date of Submission:
7. Program/Office Hosting Event:
8. Event Title (or Working Title):
9. Proposed Date(s) or Date Span(s):
10. General description of the event:
11. Who is the target market?
12. How many attendees are projected?
13. The event is to be marketed (*circle all that apply*)
 locally regionally nationally internationally
14. What need or problem does the event address? Please cite and/or provide relevant sources and research, as appropriate.
15. How does the event fit the mission of CIIS?
16. What is the benefit to the community at large? To CIIS?
17. What is the goal of the event?
18. What activities within the event support the goal?
19. What are the expected outcomes? What defines whether the event is successful? Describe the methods to evaluate this, and the use of the evaluation's results.
20. Are outside collaborators or partners co-producing the event? What is the status of any signed contracts or MOU's?
21. Who specifically is presenting and producing the event (e.g., which CIIS faculty, staff, and student workers, and external speakers, artists, activists, scholars, practitioners)?
22. How many workload units do faculty receive?
23. How many hours are staff and/or administrative adjuncts required to put into the event?
24. How many hours are student workers expected to put into the event?
25. If on campus, how many rooms, and at what capacities, are needed? Is Namaste Hall needed? If virtual, how many webinars, and with what capacities, are needed?

26. Is A/V support needed?
27. How is the event to be documented? (e.g., videography, publishing papers, podcasts)
28. Describe any potential external sources of funding, including personal or institutional connections, any previous contact, and any application deadlines.
29. CIIS can offer a certain subset of events to attendees at no or low cost. Is this to be such an activity?
30. Is a CIIS web page requested? Yes/No
If yes, please provide suggested web page name: www.ciis.edu/_____
31. Is access to online registration system requested?
If yes, would you also use this system to track presentation submissions? Yes/No

REQUIRED ATTACHMENTS

- A production timeline, which includes securing presenters, marketing, selling tickets, scheduling staff, reserving rooms, acquiring refreshments, set-up, break-down, assessing, etc.
- A budget, which includes:
 - a) expenses for presenters, contractors, consultants, temps, marketing materials, travels and lodging, A/V and other equipment, materials and supplies, content licensing, caterers, refreshments (if Namaste Hall is to be used during a weekend and/or weeknight, include \$6,000 per day as an expense to defray the loss of income Public Programs will incur)
 - b) revenue from ticket prices, grants or donations; and
 - c) if there's a shortfall, what amount is to be covered by the Provost's Office.