



Policy Number: CO025

Date: December 1, 2015

  
John Griffin, Chief Financial Officer

**Title:** Insurance Certificate Requirements for Third Party Clients

**Purpose**

To ensure all events by third party clients at The Orange Grove Bistro (OGB) are properly insured.

**Background**

The University Corporation (TUC) received an auxiliary compliance audit finding citing certificates of insurance and appropriate indemnification were not always obtained for third party clients for special events at the Orange Grove Bistro. This practice had not been done in the past.

**Procedure**

1. Third party groups are defined as any group holding a special event at the OGB outside the standard Monday thru Friday lunch business, and who conduct non-campus related business.
2. The OGB obtained the service of Alliant Insurance Services, Inc. and enrolled in Alliant's special event liability insurance program to secure insurance for third party clients.
3. For each third party client event, a tenant user application is completed. Payment for the required minimum level of insurance for Hazard levels I & II is due at the same time. See attachment A & B.
4. Alliant reviews the application then provides a certificate for insurance for the associated event.
5. Completed applications and certificates of insurance are attached to the BEO and retained for our records.
6. A quarterly report of tenant user's applications is required by Alliant. A special event reporting form for each quarter for copies of all certificates of insurance issued for the quarter ending must be attached to this report, and sent to Alliant no later than the 10<sup>th</sup> days of the next month.
7. For third party clients with their own insurance, a certificate of the insured is required prior to the scheduled special event. The certificate is attached to the BEO and retained by the OGB.
8. When booking an event the OGB management identifies clients considered third party and use a dedicated BEO template named Third Party Client. A record of this is archived in Caterease, OGB's catering software system. See attachment C.



## TENANT/USER and INSTRUCTOR APPLICATION

If event requires underwriter approval please allow 10 days (if possible) prior to event date. If insufficient time is not allowed possible decline on coverage could occur. Contact us by fax at (619) 699-0902 or email us at [sep@alliantinsurance.com](mailto:sep@alliantinsurance.com)

### EVENT HOLDER INFORMATION

Name:

Address:

Phone Number:

Fax Number:

Email Address:

### TENANT/USER EVENT INFORMATION

Name/Type of Event (15<sup>TH</sup> Birthday Party, Anniversary Party, Meeting, Dance, Job Fair, etc.)

Description of Event:

Date(s):

Hour(s):

Location:

Attendance (Per Day):

Total Attendance for Event:

Ages of Attendees:

Will waivers be signed? Yes No

Participants (Per Day):

Ages of Participants :

Are Fireworks Included?

Carnival Rides?

Bands?

How Many?

Names\*:

Type of Music?

*\*if more than one please attach a separate page*



## TENANT/USER and INSTRUCTOR APPLICATION

### TENANT/USER EVENT - ADDITIONAL INFORMATION

Additional Insureds:

Number of Exhibitors Requiring Coverage (No Sales)\*:

Number of Concessionaires Requiring Coverage (Non Food Sales)\*:

Number of Concessionaires Requiring Coverage (Food Sales)\*:

*\*Please provide separate list of concessionaires / exhibitors to be covered*

Liquor Liability Needed?

### INSTRUCTOR CLASS INFORMATION

Description of Instructional Class:

Date(s):

Hour(s):

Location:

Attendance (Per Class Per Day):

Same attendance per day:

Are these in weekly sessions?

Yes

No

Ages of Attendees:



## TENANT/USER and INSTRUCTOR APPLICATION

### OPTIONAL COVERAGES

#### Limit Increase

\$1,000,000/\$3,000,000 Total Event premium will be increased by 11%

\$2,000,000/\$2,000,000 Total Event premium will be increased by 19%

#### Property Damage :

\$50,000 Limit Premium \$50.00

\$100,000 Limit Premium \$100.00

### PAYMENT OPTIONS

☐ Credit Card (see separate form)

☐ Cash / Check (Payable to Public Entity)

### COMPANY USE ONLY

Hazard Group:

Attendance Premium:

Exhibitors Premium:

Concessionaires Premium:

Liquor Liability Premium:

Additional Insureds Premium:

AD&D Premium:

Increase Limits Premium:

TOTAL PREMIUM:

## TENANT/USER PROGRAM HAZARD SCHEDULE

(A "Tenant/User Event" is an event that is held or sponsored by companies, Organizations, or individuals that have been permitted to use your premises)

TENANT / USER EVENT	HAZ I	HAZ II	HAZ III	U/W Approval Required	NO Participant Coverage
AEROBIC & JAZZERCISE CLASSES		X			
ANIMAL ACTS / SHOWS			X		
ANIMAL TRAINING		X			
ANTIQUE SHOWS	X				
ART FESTIVALS / SHOWS	X				
AUCTIONS	X				
AUTO SHOWS (No Auto Coverage)	X				
AWARDS PRESENTATIONS	X				
BALLETS	X				
BANQUETS	X				
BAZAARS	X				
BEAUTY PAGEANTS	X				
BICYCLE RALLIES			X		X
BINGO GAMES	X				
BLOCK PARTIES / STREET CLOSURES (Excludes Bleachers)		X		X	
BOAT SHOWS	X				
BODY BUILDING CONTESTS	X				
BUSINESS MEETINGS / SHOWS	X				
CARNIVALS (NO Rides)			X	X	
CASINO & LOUNGE SHOWS (No Performer or Crew Coverage)			X		
CHAMBER OF COMMERCE EVENTS	X				
CHRISTMAS TREE LOTS / FARMS (No cut your own)		X			
CHARITY BENEFITS (Including Auctions / Sales)	X				
CINEMAS	X				
CIVIC CLUB MEETINGS	X				
COMEDY SHOWS (No Performer or Crew Coverage)			X		
CONCERTS (NO Hip/Hop, Rap, Heavy Metal)					
Classical Music	X				X
Indoors under 1,500	X				X
Symphony	X				X
Outdoors under 1,500		X			X
Rock under 5,000			X	X	X
Alternative under 1,500			X	X	X
CONSUMER SHOWS	X				
CONVENTIONS (Inside)	X				
CORPORATE EVENTS		X			
COUNTRY WESTERN EVENTS (NO Equine)			X		X
CRAFT SHOWS	X				

- Declination of Events could be due to the attendance size or level of performers
- Athletic Participant's coverage requires prior company approval and signed waiver(s)
- Liquor Legal Liability for Hazard Group II must be submitted for Underwriter Approval. See Page 16 for details

# **TENANT/USER PROGRAM** **HAZARD SCHEDULE (Continued)**

(A "Tenant/User Event" is an event that is held or sponsored by companies, organizations, or individuals that have been permitted to use your premises)

TENANT/USER EVENT	HAZ I	HAZ II	HAZ III	U/W Approval Required	NO Participant Coverage
UNION MEETINGS			X		
VACATION SHOWS	X				
VOTER REGISTRATIONS		X			
WEDDINGS & RECEPTIONS	X				
WEDDING PHOTOGRAPHERS	X				
ZOOS (ACTUAL FACILITY)			X		

- Declination of Events could be due to the attendance size or level of performers
- Athletic Participant's coverage requires prior company approval and signed waiver(s)
- Liquor Legal Liability for Hazard Group II must be submitted for Underwriter Approval. See Page 16 for details

## TENANT USER EVENT PREMIUMS

January 1, 2015 to January 1, 2016

---

### EXHIBITORS AND CONCESSIONAIRE PREMIUMS:

Exhibitors - No Sales	\$29.00	Per Day/Per Exhibitor
Concessionaires - Non Food Sales	\$39.00	Per Day/Per Concessionaire
Concessionaires - Food Sales	\$49.00	Per Day/Per Concessionaire

Premiums Include All Taxes & Fees

Exhibitors and Concessionaires coverage is only available in conjunction with a scheduled event.

---

### LIQUOR LEGAL LIABILITY PREMIUMS:

#### HAZARD GROUP I ONLY:

Alcoholic beverages served charge \$60.00 premium for each day of the event.

#### HAZARD GROUPS II AND III:

Require prior company approval. The premiums below are for quote purposes only

1-150	\$121
151-300	\$146
301-500	\$194
500 +	To Be Determined

Premium include all taxes and fees

Accident Medical Liquor Rate is 20% of Premium subject to a \$25 Minimum Premium

Liquor Legal Liability coverage is only available in conjunction with a scheduled event

### LIQUOR CHARGES AFTER MIDNIGHT EVENTS:

- If an event **With Liquor** extends beyond Midnight and ends before 2:00 AM (excluding take down days) you can check the appropriate box on the certificate and add a 15% surcharge to the Liquor premium (Example: \$194.00 x 15% = \$223.00)
- If the event goes beyond 2:00 AM an additional day will to be charged for the event and liquor



## Third Party Client

Client/Organization Jane Doe	Event Date 12/31/2015 (Thu)	Telephone (818) 677-2076	Booking Cell	Event # E04398
Address 18111 Nordhoff Street, Northridge, CA 91330		Booking Tel (818) 677-2076	Site Contact Jane Doe	Guests 100 (Pln)
Party Name Example Event	Pay Method	Sales Rep Brandia Tomlin	Category Example Event	

- MINIMUM GUARANTEED ATTENDANCE MUST BE RECEIVED WITHIN **7 DAYS** OF EVENT. IF ATTENDANCE FALLS BELOW THE GUARANTEED NUMBER THE CLIENT WILL BE CHARGED FOR THE GUARANTEED NUMBER. GUARANTEED NUMBER MUST BE RECEIVED BY 3:30 PM AND DATE INDICATED.
- ALL MENU CHANGES MUST BE RECEIVED **3 BUSINESS DAYS** OF EVENT.
- ALL DEPOSITS ARE NON-REFUNDABLE OR TRANSFERABLE.

BANQUET ROOMS						
Description	Start	End	Arrival	Departure	Banquet Room	Setup Style
Breakfast	8:00 am	10:00 am	7:30 am	NA	Main	Banquet

FOOD & SERVICE ITEMS				Price	Qty	Total
Food/Service Items						
<b>Continental Breakfast</b>				7.95	100	795.00

- ❖ Assorted Mini Muffins
- ❖ Scones Served with Preserves
- ❖ Assorted Fruit Danish
- ❖ Fresh Sliced Seasonal Fruit
- ❖ Beverages Include: Orange Juice, Coffee, Hot Tea & Ice Water

	Food	Beverage	Liquor	Equipment	Labor	Room	Other	Total
Subtotal	795.00	0.00	0.00	0.00	0.00	0.00	0.00	795.00
Service Charge	135.15	0.00	0.00	0.00	0.00	0.00	0.00	135.15
Taxes	83.71	0.00	0.00	0.00	0.00	0.00	0.00	83.71
Total	1,013.86	0.00	0.00	0.00	0.00	0.00	0.00	1,013.86

Subtotal	795.00	Paid	0.00	Pay Method	Card Number
Tax	83.71	Balance	1,013.86	Card Type	
Service Charge	135.15			Card Holder	Expires
Total Value	1,013.86			Signature	

Total balances are due prior to or the day of the event. Events not paid prior to the start of the event will not be supported.  
 Certificates of Insurance and Indemnification must be provided for all third party events Address all correspondences to  
 Brandia Tomlin, Sales Representative.  
 Credit Cards payments are accepted over the phone and in person.  
 Thank you for this opportunity to serve you.