



Welcome to Advisor Essentials, an online training module designed especially for advisors of recognized student organizations at Texas A&M.

Howdy!

The purpose of this module is to:

- Provide information that is important for you as an advisor
- Outline expectations for advisors
- Identify resources that will assist you in the education of your students
- Complete the Advisor Acknowledgement of Expectations online document

The purpose of this module is to provide you with information that is important for you to know as an advisor. This includes the expectations that we have for advisors, as well as resources and guidelines that may help you fulfill your role. You will also read and initial the Advisor Acknowledgement of Expectations during this training process.

Overview of Seminar

I. Introduction

- A. University-Student Relationships
- B. "Facilitator University" Model
- C. The Role of an Advisor
- D. Advisor Acknowledgement of Expectations

II. Student/University Rules

- A. Expressive Activity
- B. Hazing
- C. Student Travel
- D. Student Rules 41 & 42
- E. Camps and Enrichment Programs
- F. Accountability and Discipline Processes

To give you a brief overview of what will be covered in today's module, Part 1 will focus on the student organization/advisor relationship, including what your role should be as the advisor. Part 2 will focus on important student or university rules that will be helpful as you fulfill this role.

Overview of Seminar

III. Fiscal Management

- A. Budgets
- B. Student Organization Finance Center
- C. Funding Sources

IV. Event Planning

- A. Overview of the Event Planning Process
- B. Using Maroon Link Event Forms
- C. Risk Management

V. Additional Resources

- A. Online Resources
- B. Student Activities Specialty Areas
- C. Rules and Regulations

Part 3 will focus on the financial management of your student organization, and Part 4 will provide you with helpful information and resources regarding student organization event planning. Finally, Part 5 will provide you with some online resources and additional information.

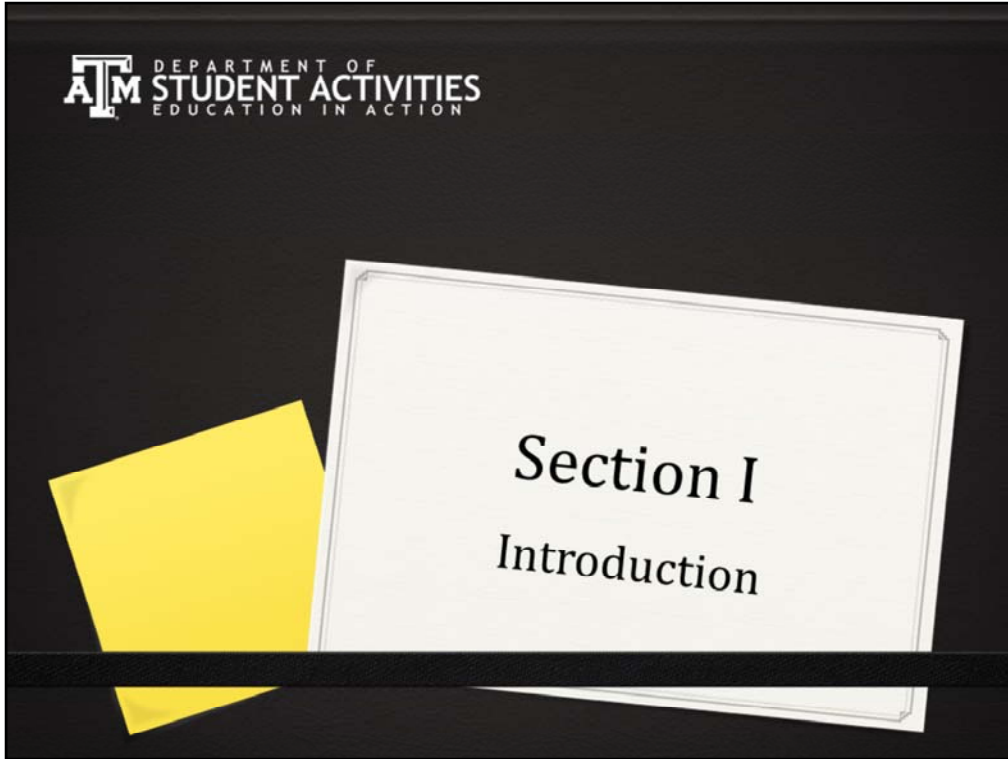
Our Goal

Education First!

- Texas A&M University ...prepares students to assume roles in leadership, responsibility, and service to society.
- Texas A&M University ...maintains the freedom of inquiry and an intellectual environment nurturing the human mind and spirit.
- Texas A&M University ...welcomes and seeks to serve persons of all racial, ethnic, and geographic groups, women and men alike, as it addresses the needs of an increasingly diverse population and a global economy.

The Department of Student Activities is committed to developing leaders of character dedicated to serving the greater good.

The Department of Student Activities is committed to developing leaders of character dedicated to serving the greater good. Likewise, Texas A&M University is about education first, and we believe that student organization involvement is just one of the many ways that our students gain their education. Your contributions and guidance as an advisor help student leaders: learn in the co-curricular, contribute to the Texas A&M, Bryan/College Station, and the global communities, experience freedom of inquiry and discourse, and learn to live and serve in a global society. In addition, you help student leaders achieve the undergraduate and graduate learning outcomes that the university has established for them. That being said, thank you in advance for your service to our student organizations!



As an advisor, we feel it is important to understand the progression and current state of the university/student organization relationship. We will begin with a brief history of this relationship, and then spend some time discussing the status and expectations of that relationship today.

University-Student Relationships

- In Loco Parentis
- Civil Rights Era
- Bystander Era
- Duty Era

First, a quick history lesson: Leading up to the 1960's, colleges and universities in the United States took on the role of parents to the students (known as In Loco Parentis), with complete authority and control over student life and activities. The students became frustrated by the restrictions placed on them, and challenged the universities based on their constitutional rights, moving this relationship into the Civil Rights era. The immediate consequence was the "bystander era" for the American university, in which responsibility for all out-of-class experiences (even high risk activities and major decisions) fell squarely on the shoulders of the students.

Today, however, we find ourselves in what is commonly referred to as the "duty era." The university has a duty to care for the well-being of its students, and the students also have a duty to care for themselves. In other words, the university and the students *share* the responsibility for the actions of students and their campus organizations.

Duties of an Advisor

- Train
- Warn of known or impending danger
- Supervise
- Maintain equipment and facilities

As an advisor, you assume this duty to care, and these duties include:

Training – it is important that you know and understand what kind of knowledge, skills, and abilities are needed for the students to be successful in their endeavors, as well as play a role in identifying who is the most qualified person or persons to provide this training.

Warning of known or impending danger – this does not mean that you are expected to have a crystal ball and know every possible situation that may arise; however, you will be expected to provide reasonable care and guidance regarding any foreseeable risks.

Supervising – As an advisor, you should be able to anticipate potential areas of concern, and it will be important for you to identify who is going to be the most appropriate person or persons to supervise the organization’s activities. Again, this does not mean that you are in all places at all times, but you do have a responsibility to know that proper supervision is being provided by qualified individuals.

Finally, maintaining equipment or facilities – if your organization is going to use equipment or facilities as part of their activities, you will want to ask yourself, “have the equipment and/or facilities being utilized been properly inspected?” As an advisor, you should ensure that the equipment and facilities that are being used are appropriate and safe for their

intended purposes, and be sure to include the students as part of this process.

“Facilitator University” Model

A Facilitator University seeks:

- *shared* responsibility
- a *balance* of the rights and responsibilities of the university and students
- an *appropriate and reasonable* degree of risk
- to work within *guiding boundaries*

The “facilitator university” model is our philosophical approach to working with students in the duty era. While the university has the responsibility of ensuring that students are prepared and capable of making fair, intelligent, and reasonable decisions, the students also assume responsibility for their actions and decisions.

A facilitator university seeks *shared* responsibility, and the goal for advisors is to find a balance between directly guiding the organization and allowing students to guide the organization themselves. Facilitation of student organizations also implies an *appropriate and reasonable degree of risk*. We want our students to take risks and try new things, provided that they do so within the *guiding boundaries* that are set forth for them.

“Facilitator University” Model

Guiding boundaries include:

- mission and values of the university
- university and student rules
- local, state, and federal laws
- Department of Student Activities policies
- organization constitution and by-laws
- administrative documents from affiliated local or national organizations

These *guiding boundaries* include, first and foremost, the mission and values of Texas A&M University. We believe that student organizations should reflect the mission and values of the institution in all that they do. Additionally, there are guiding boundaries defined by university rules, local, state, and federal laws, and Department of Student Activities policies. The Student Organization Manual, available at orgmanual.tamu.edu, is an essential resource for information about these boundaries.

Your organization’s guiding boundaries also include their constitution and by-laws and any administrative documents from their affiliated local or national organizations. All of these guiding boundaries help to establish the operating parameters for your organization, and they should always be consulted when making organizational decisions.

The Role of an Advisor

Advisors should:

- Facilitate intelligent, fair, and reasonable decision-making
- Advise organizations about potential and perceived risks
- Assist in the planning and coordination of events
- Attend events and meetings
- Be available for advice and consultation
- Be aware of and understand rules and policies
- Be aware of the organization's financial status
- Approve organizational expenditures

As an advisor, you should be aware of the expectations that have been established for you by both the university and the Department of Student Activities. Please keep these in mind as you work with your student organization.

First, we expect our student organizations to work with their advisors and other campus administrators to facilitate intelligent, fair and reasonable choices within the boundaries established by state, federal, and local laws, university rules, and the educational mission of the institution. As facilitators, you should seek to balance the rights and responsibilities of students and the university.

Advisors sometimes ask if they are allowed to tell their student organizations “no.” While our goal is to empower students to make fair, reasonable, and intelligent decisions about their events and activities, please keep in mind that it may be necessary to remove options when a decision would result in a violation of laws or university rules or create an unreasonable level of risk for the students.

As a university, our goal is to ensure that our student organizations are being advised about the potential and perceived risks involved in their activities. As an advisor, you should support the organization in the planning and coordination of their events and help student leaders take corrective actions and proactive steps to minimize accidental injury and/or loss.

Advisors are also expected to attend events and meetings, as agreed upon by your organization and your department, and be available outside of those activities for advice and consultation.

Advisors should also be involved in event planning, decision making, goal setting, and accountability of members and leaders, and you should be aware of, and understand, university rules and policies as they pertain to your organization and its events. As an advisor, you should help to educate your students on the consequences for choosing to operate outside of these parameters which includes reporting any violations of those policies. Finally, you should be aware of your organization's financial status, and you are expected to review and approve all financial expenditures relating to the organization.

The Role of an Advisor

Advisors should:

- Understand department expectations
- Be familiar with organizational guiding documents and policies
- Report and follow up on any issues warranting disciplinary action
- Be committed to the educational development of the students and uphold the mission and values of Texas A&M University

Additionally, we recommend that you understand your department's expectations of you as an advisor. Talk with your supervisor about the time and resources that will be needed to appropriately support your student organization(s). It is also important that you familiarize yourself with the guiding documents and policies of the organization. Read your organization's constitution, and pay attention to areas that address guidelines for elections, accepting and removing members, hosting activities, etc.

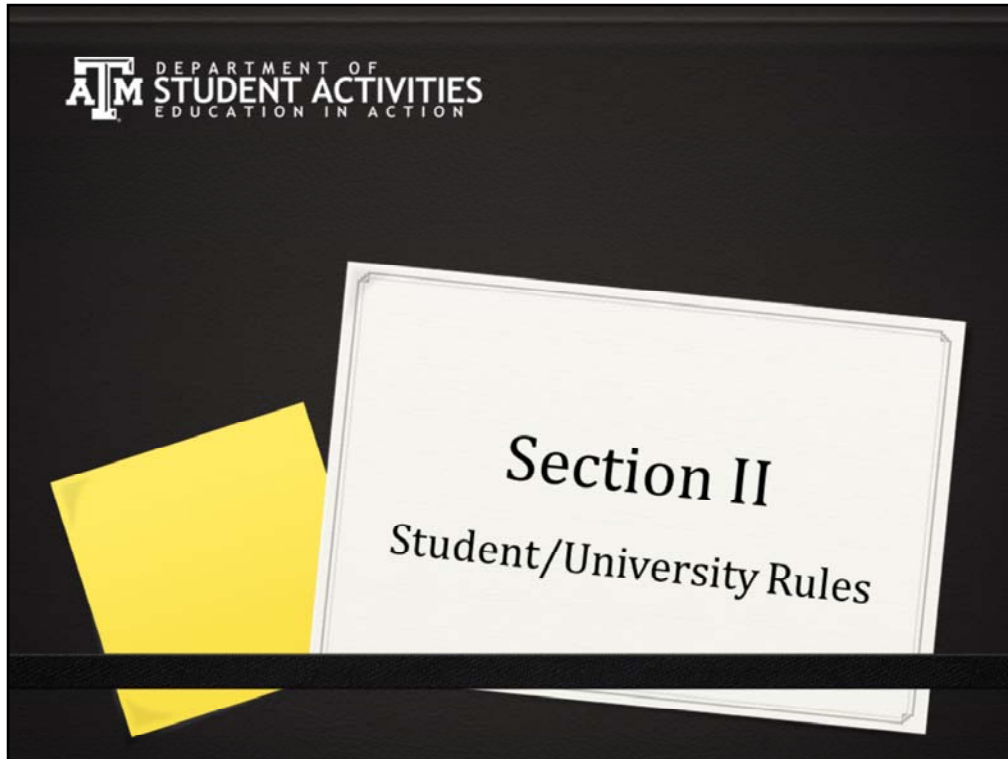
Advisors should also be prepared to report and follow up on any issues that might warrant disciplinary action. Make sure your students understand that there are certain situations you are required to report as a state employee, such as hazing or other conduct violations. In the next section, we will outline the formal discipline process, during which your main role will be to guide the students through the process and participate as needed.

Finally, we expect you to be committed to the educational development of our students though your role as a facilitator. We want our student organizations to uphold the mission and values of Texas A&M University, and they can do this more successfully with your support and guidance.

Advisor Acknowledgement of Expectations

- Will be completed at the end of this training module
- Developed with and approved by the Office of General Counsel
- Outlines university expectations for advisors
- Can be a helpful conversation tool with your students

At the end of this training process, you will review and initial the Advisor Acknowledgement of Expectations. This document was developed with and approved by the Office of General Counsel. It will not only outline the expectations that we have just covered, but it can also be a helpful conversation tool with your students. Indeed, we encourage you to share the information contained in this document with your students.



As an advisor, it is important for you to be familiar with several university or student rules that are commonly encountered by our student organizations. These include rules regarding expressive activity, hazing, recognition, event planning, student travel and camps and enrichment programs.

Student Rule: Expressive Activity (Appendix XI)

Distribution of Materials

- Distribution of printed materials *does not* need a permit.
- Reserving space for distribution is through the building proctor.

Sales and Other Transactions

- Any sales or other transactions on campus require a Concessions Permit.
- The sale or distribution of food may require a Health Permit or a Food Distribution Form.

Remember:

- Expressive activities should not interfere with normal university operations, impede traffic, infringe on the rights of others, or violate applicable laws or university rules.

In fulfilling its multiple missions as an institution of higher learning, Texas A&M encourages the free exchange of ideas. The university will protect the rights of freedom of speech, expression, petition and peaceful assembly as set forth in the U.S. Constitution. However, Texas A&M University also maintains its right to regulate reasonable time, place and manner restrictions concerning acts of expression and dissent.

Expressive activity may occur in various forms, including symbolic, verbal, or written expression. If your organization chooses to distribute literature or information as part of their expressive activity, please note that the distribution of printed materials on campus does not require a permit. However, if the organization is interested in reserving space to distribute their printed material, they will need to work through the appropriate building proctor to do so.

If the organization is choosing to sell an item or conduct any other type of transaction on campus as part of their expressive activity, a concessions permit will be required and may be obtained on the Student Activities website. These permit requests should be turned in at least two business days in advance of any sale or transaction. If the sale is involving food items, the organization may need to obtain a health permit and/or a food distribution form. Please see the Student Organization Manual for additional guidelines regarding Food at Events.

When engaging in expressive activity, it is important that students understand their rights and the rights of others. Expressive activities should not interfere with normal university operations, impede traffic, infringe on the rights of others, or violate applicable laws or university rules. Those who choose to observe, participate in, or listen to expressive activity bear the responsibility of recognizing and honoring the rights of free speech.

Student Rule: Hazing (24.3.3)

Hazing is:

- a violation of Texas A&M University policy and Texas State Law
- typically in the form of physical risk or mental distress
- harmful to individuals, groups, and the university
- found in all types of student organizations

Hazing as defined per Student Rules:

- “prohibited acts committed for the purpose of initiation, admission into , affiliation with, or as a condition of continued membership in a group or organization.”

Hazing includes:

- any act that endangers the mental or physical health or safety of a student
- destruction or removal of public or private property
- assisting, directing, or causing others to participate

While being part of a student organization can be a very meaningful experience for students, hazing is a hidden and serious problem that undermines the value of these experiences for many individuals. We know that Texas A&M is not immune to hazing, and we strongly believe that it is important to examine hazing practices in an effort to overcome the ideals that perpetuate them.

For starters, here is some important information to consider when discussing hazing with your students:

Hazing is a violation of Texas A&M University policy and Texas State law.

Hazing takes on various forms, but typically involves physical risks or mental distress through humiliating, intimidating, demeaning or other activities.

Hazing can cause significant harm to individuals, groups and the University.

Hazing occurs in all types of student organizations.

Groups that haze often view it as positive and necessary. On the contrary, groups that haze can almost always achieve the positive outcomes they seek through non-hazing means.

Student Rule 24.3.3 defines hazing as “Prohibited acts committed for the purpose of initiation, admission into, affiliation with, or as a condition for continued membership in a group or organization.” Prohibited behavior includes any act that endangers the mental or physical health or safety of a student, or that destroys or removes public or private

property.

Assisting, directing, or in any way causing others to participate in this behavior or in behavior that causes ridicule, humiliation, or embarrassment to the individual is considered hazing. Having firsthand knowledge of the planning of such activities or firsthand knowledge that an incident of this type has occurred AND failing to report it to appropriate university officials is also a violation of this rule.

Reporting Hazing Incidents

To report hazing, contact the University Police Department, the Dean of Student Life, or visit one of the following websites:

- **tellsomebody.tamu.edu**
- **stophazing.tamu.edu**



To report hazing, please contact the University Police Department, the Dean of Student Life, or visit the Tell Somebody or Stop Hazing websites. More information on this important topic can also be found on the Stop Hazing Website.

Student Rules 41 & 42

Student Rule 41

- Operating as a recognized organization
- Student leader eligibility requirements
- Advisor and membership requirements

Student Rule 42

- Use of university logos and trademarks
- Event planning guidelines
- Approval process for StuOrg contracts

It is expected...

- That all student organizations have their events, on- or off-campus, reviewed by their advisor
- That advisors have an opportunity to review all contracts prior to execution
- That contracts for an All-U audience be reviewed by StuAct

Two important rules to be familiar with include Student Rules 41 and 42. Student Rule 41 addresses important topics such as existing as a recognized student organization, the recognition process, student leader eligibility requirements, and advisor and membership requirements. It is important to know that student organization membership should be open to all students unless otherwise permitted under applicable federal law. Texas A&M University, in accordance with applicable federal and state law, prohibits discrimination, including harassment, on the basis of race, color, national or ethnic origin, religion, sex, disability, age, sexual orientation, or veteran status.

Student Rule 42 addresses the use of the university's name, logos and trademarks, as well as event planning expectations and student organization contracts. Per this rule, it is expected that all student organizations will have their events, whether on or off campus, reviewed by their university advisor. Additionally, if a recognized student organization is entering into a contract on behalf of their organization, the organization is expected to provide their advisor an opportunity to review the contract prior to execution. If the contract is for an all-university audience, then the contract needs to be submitted to the Department of Student Activities for review and approval. This should be done NO LESS than 6-8 weeks in advance of their program.

University Rule: Student Travel (13.04.99.M1)

When traveling 25 miles or more from campus, student organizations should...

- **Complete** participant waivers and bring copies of them on the trip
- **Register** the trip with the University by completing a *Travel Information Form*
- **Work** with the Study Abroad Programs Office if traveling internationally
- **Consult** their faculty/staff advisor before travel takes place, regardless of the destination.

Whether for retreats, mission trips, conferences, performances, competitions, or just plain fun, many of our students travel as part of student organization activities. When a student travels with or on behalf of a student organization, the Student Travel Rule should be observed. The Student Travel Rule applies when student organization travel occurs 25 miles or more from campus. Student organizations will be expected to complete two necessary steps prior to their travel:

1. All travel participants should complete a waiver and release form which verifies that they understand and accept the risks involved in the travel activity, as well as assume responsibility for their behavior. This waiver also collects important information about trip participants such as medical conditions, insurance information, and emergency contact information. A waiver template can be found and downloaded from the Student Activities website, and copies of the completed waivers should be carried with student leaders for the duration of the trip. We recommend that your organization keep these waivers on file for three years per the university's records retention schedule.

2. Written notification should also be provided to the university prior to your travel departure. The travel information form can be found under your organization's Resources tab in StuAct Online. This form collects important information about organization travel plans such as dates of travel, travel route, and emergency contact information for travel participants. This information will be used by the university in the event that a critical

incident occurs during their trip.

Additionally, student organizations that are sponsoring organized travel outside the United States are required to work through the Study Abroad Program Office to complete a pre-departure briefing which includes important information and training on safety, emergency procedures, crisis management, and resources available to the group while overseas. International travel safety guidelines and health insurance can also be obtained through this office. Please note: student organizations will not be permitted to travel to countries that have been issued a travel warning by the US Department of State, and student organizations should always consult their faculty/staff advisor before travel takes place, regardless of the destination.

University Rule: Camps and Enrichment Programs (11.99.99.M1.01)

This rule applies when student organization activities:

- Have a participant group that includes individuals under the age of 18
- Uses the name, staff, affiliation, facilities, or other resources of Texas A&M University

The Camps and Enrichment Process:

- Requires an application that should be submitted NO LESS than eight weeks prior to the event
- Ensures preparations for working with minors
- Includes background screenings and procurement of insurance

The Camps and Enrichment Programs rule applies to student organization activities that have participant groups that include any individuals that are under the age of eighteen, and who use the name, staff, affiliation, facilities, or other resources of Texas A&M University.

All student organizations hosting a camp or enrichment program are required to submit an application for their event NO LESS than eight weeks prior to the start date of the camp or program. Applications submitted less than eight weeks prior to the start of their program will not be reviewed and the required insurance will not be secured by Student Activities.

The Camps and Enrichment process helps to ensure that a student organization is prepared to take on the responsibility of working with minors. The process includes verification of background screenings on all directors, staff, counselors, volunteers, and other adults who will work with the program. A program budget and a complete description of program activities should accompany the application form. Finally, all student organization camps or enrichment programs will be required to secure general liability and accident medical insurance coverage through the Department of Student Activities.

Individuals with Disabilities

- Under state and federal law and A&M System policy, no individual will be excluded from participation in, or be denied the benefit of, or be subjected to discrimination, based on disability under any system program or activity.
- This includes extracurricular programs such as student organizations and club sports and activities. This may mean making reasonable modifications and providing aids and services that are necessary to ensure that qualified individuals with disabilities have an equal opportunity to participate, unless to do so would fundamentally alter the program.

▪ Under state and federal law and A&M System policy, no individual will be excluded from participation in, or be denied the benefit of, or be subjected to discrimination, based on disability under any system program or activity.

▪ This includes extracurricular programs such as student organizations and club sports and activities. This may mean making reasonable modifications and providing aids and services that are necessary to ensure that qualified individuals with disabilities have

an equal opportunity to participate, unless to do so would fundamentally alter the program.

Individuals with Disabilities

- A person with a disability is one who (1) has a physical or mental impairment that substantially limits one or more major life activities; (2) has a record of such an impairment; or (3) is regarded as having such an impairment. A&M System programs and activities will not operate on the basis of generalizations, assumptions, prejudices, or stereotypes about disability generally, or specific disabilities in particular.
- If you have any questions or concerns about making accommodations for individuals with disabilities, contact your Section 504/ADA Coordinator.

▪ A person with a disability is one who (1) has a physical or mental impairment that substantially limits one or more major life activities; (2) has a record of such an impairment; or (3) is regarded as having such an impairment. A&M System programs and activities will not operate on the basis of generalizations, assumptions, prejudices, or stereotypes about disability generally, or specific disabilities in particular.

- If you have any questions or concerns about making accommodations for individuals with disabilities, contact your Section 504/ADA Coordinator.

Accountability and Discipline Processes

The goal of the accountability process
is to *promote student learning* and
responsible decision-making.

As mentioned earlier, we expect advisors to report and follow up on any issues that might warrant disciplinary action. In the next few slides, we will outline the formal discipline process, during which your main role will be to guide the students through the process and participate as needed.

The goal of the accountability and discipline process is to promote student learning and responsible decision making. As such, it will be important for you to help students make responsible decisions and develop leadership skills – which will include helping the students hold themselves and each other accountable.

University Reporting Mechanisms

Stop Hazing:

- <http://stophazing.tamu.edu/>
- Definition and examples of hazing, applicable rules and laws, links to resources, and tools for reporting

Tell Somebody:

- <http://tellsomebody.tamu.edu/>
- To report concerns about unusual behavior from students, faculty, or staff

Student Activities Organization Incident Report:

- <http://studentactivities.tamu.edu/>
- To report violations of organizational constitution/by-laws, student or university rules, or the law

Student Conflict Resolution Services:

- <http://studentlife.tamu.edu/scrs/>
- To provide information concerning alleged Student Rule violations

In the event that a rule violation must be reported, there are a number of ways that this can be accomplished, including the Stop Hazing and Tell Somebody websites, the Student Activities Organization Incident Report, or Student Conflict Resolution Services.

Student Activities will investigate all conflicts relating to organizational behavior

Student Conduct will investigate all concerns relating to individual behavior

Additionally, the Corps of Cadets, Residence Life, and Greek Life may also choose to pursue a department specific investigation relating to the violation.

Advisor Role in the Discipline Process

1. Initial Investigation

- provide information to the investigative team
- assist in facilitating investigation meetings with students

2. Review of Report

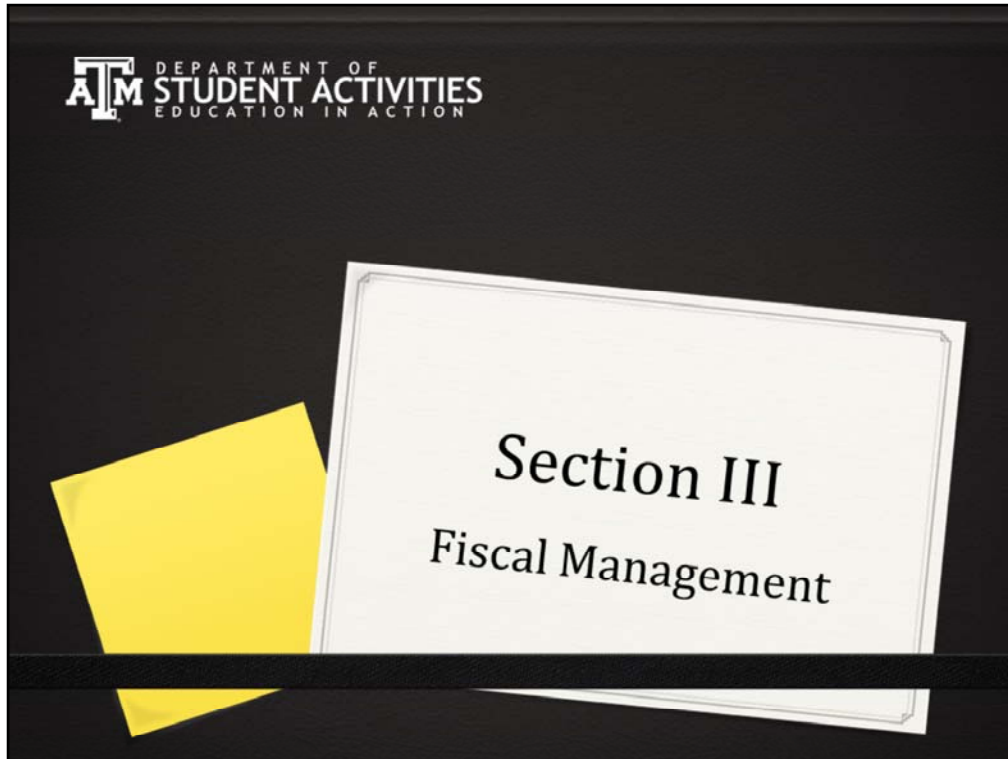
- will not play a formal role in the determination of charges

3. Adjudication

- will be notified of the outcome of any cases, and may be asked to facilitate completion of any sanctions

Once reported, you may be asked to participate in the investigation or discipline process. If this occurs, please be prepared to provide information to the investigative team and assist in the facilitation of investigative meetings. You will not be asked to determine the charges or sanctions for any violation, but you may be asked to help facilitate the completion of those sanctions.

Again, our goal is to promote student learning and responsible decision making, and as an advisor and facilitator, you can be PROACTIVE in helping students to accomplish this goal.



Our next section will focus on the fiscal management of student organizations. Did you know that in the course of one year, the SOFC processes approximately \$17 million dollars in student organization transactions? With numbers like that, it should go without saying that fiscal management is going to be a crucial component in helping your organization be successful!

Budgets

A **budget** allows for structure and guidelines for the use of organizational funds.

Advisors should challenge the students to make budget decisions that best reflect the **mission and purpose** of their organization.

For starters, we strongly encourage student organizations to create a budget. This allows for structure and guidelines regarding the use of their funds. Advisors play a pivotal role in budget development by challenging the students to make budget decisions that best reflect the mission and purpose of their organization.

Student Organization Finance Center

SOFC services include:

- free banking
- assistance with budgets
- cash handling procedure audits
- assistance with tax procedures
- credit card acceptance and usage
- treasurer training
- cash handling supplies
- ...and much more!

The Student Organization Finance Center is the student organization bank that all student organizations are required to use per Student Rules, and is located on the second floor of the Koldus Student Services Building. At the SOFC, student organizations can conduct any number of banking transactions, such as making deposits, securing cash advances, or submitting check requests for the payment of bills.

Additionally, the SOFC also offers a number of educational services. For instance, the SOFC staff can work with your students on creating or improving budgets, auditing cash handling procedures, navigating tax procedures, and more.

SOFC Advisor Expectations

The SOFC expects advisors to:

- review monthly statements that are sent to the Chief Student Leader and Treasurer via StuAct Online
- provide your signature on all SOFC transactions
- examine all requests or receipts
- ensure that the use of funds remains in line with the mission of the organization
- be the first contact with regard to finances and financial processes
- hold financial officers accountable

Some additional advisor expectations regarding organizational finances include the following: Every month, the StuAct Online system will send an account statement to the organization's Advisor, Chief Student Leader, and Treasurer. Please review these statements carefully and report any typos or errors.

Your signature will also be required for any SOFC transaction. We encourage you to closely examine all requests or receipts, and ensure that the use of funds remains in line with the mission of the organization.

Finally, we count on the advisor being the first line of contact for questions relating to the organization's finances and financial procedures. Therefore, please make sure you are familiar with these processes, not only so you can answer questions, but also to hold financial officers accountable.

Funding Sources

Two funds are available through StuAct:

1. Student Organization Funding supports new or additional activities and events.
1. Risk Initiative Funding helps to promote proactive risk management and mitigate unforeseen risks associated with an event.

Please be aware that there are two types of funding opportunities that are available to student organizations. These funds are generously provided by the Association of Former Students and allocated via application request through the Department of Student Activities.

The first of these funds is Student Organization Funding which is available for all groups except religious, social/political, sport clubs, or Health Science Center organizations. This funding supports new or additional activities and events.

The second fund, Risk Initiative Funding, is available for all student organizations. This funding helps to promote proactive risk management and mitigate unforeseen risks associated with an event, such as increased security, university transportation, etc.

Applications for funding are made available on the Student Organization Finance Center's website, and all allocated funds are deposited into the organization's SOFC account upon approval of the allocation.



We believe that we have the best student organizations on the planet, and one area that we feel student organizations have an unlimited opportunity to excel is through event planning. Event planning is a great way for organizations to showcase their creativity, live their values, and promote and demonstrate excellence in decision-making, critical thinking, and problem-solving. As an advisor, one of your most important roles is to facilitate the event planning and decision making processes.

Overview of Process

Event Planning Goals:

1. Help students determine reasonable levels of risk
2. Enhance the safety of participants, reducing the possibility of critical incidents and the aftermath of negative outcomes
3. Share the responsibility for decision-making and reduce liability for risks
4. Enhance student development

The event planning process was established by the Department of Student Activities with the following goals in mind:

1. Help students determine reasonable levels of risk
2. Enhance the safety of participants, reducing the possibility of critical incidents and the aftermath of negative outcomes
3. Share the responsibility for decision-making and reduce liability for risks
4. Enhance student development

Event Planning

Proactive Planning

- Ask yourself three questions:
 - Furthering mission/purpose?
 - Guiding boundaries?
 - Ability to plan and execute?
- Identify risks
- Utilize the Maroon Link Event Form

Implementation

- Establish communication channels
- Use your plan

Assessment

- Reflect on the event
- Share the information with incoming officers

When working with an organization on their events, it is easiest to think of the event planning process in three simple stages: proactive planning, implementation and assessment.

The proactive planning stage begins when student leaders start to outline and develop their event. During this stage, it is important to ask them three questions: 1) How does this event further the mission or purpose of the organization? 2) What guiding boundaries, including specific organizational protocols or University rules apply to your event? And 3) Do you have the ability, financial resources, and human resources necessary to plan and execute this event?

Thinking proactively also involves the identification of potential risks. Risks are commonly divided into five categories: Physical, Reputational, Emotional, Financial and Facilities (also known as PREFF). Once these potential risks have been identified, their likelihood and potential consequence will determine how the leadership should proceed with the event planning. Leaders can choose to accept, modify, transfer or eliminate these risks.

To assist in your efforts, the Division of Student Affairs has developed a formal online event planning process that helps organizations identify risks that may prevent them from achieving their goals, as well as provides them with resources to help their event be more successful. The online event planning tool gives you, the advisor, and various campus

entities an opportunity to review the event so that we can assist the students in planning the best event possible. The online tool will also archive completed event planning information so that it can be accessed as a resource for future event planning.

During the implementation of the event, you may need to help students make decisions on a moment's notice. Therefore, ensure that the students have established communication channels that enable everyone to get correct and updated information. Also, helping students develop a plan, and thoroughly reviewing that plan prior to the event, will help the organization more effectively address issues that they can easily anticipate such as weather emergencies, illness/injury, equipment malfunction, etc.

Finally, the process of evaluation or assessment completes the Maroon Link Event Form process because it allows for thorough reflection of the event itself. Asking your students questions like "What went well? What should you do differently? What resources could be consulted in future planning?" and then encouraging the students to document this information can be a determining factor in the success of future events.

The Maroon Link Event Form...

- Serves as an educational tool
- Walks students through directive questions about their planning considerations and mitigation of risks
- Is routed to the advisor (via email) for review. The advisor can:
 - Engage with students and campus entities in the comments section with questions, suggestions for improvement, etc.
 - Approve or deny the event.
- Completed event forms will be archived for future reference.
- To learn more about Maroon Link visit <http://maroonlink.tamu.edu>

The Maroon Link Event Form serves as an educational tool, walking students through directive questions about their planning considerations and mitigation of risks.

After your students have completed a Maroon Link Event Form, you will receive an e-mail from the Maroon Link system requesting your review and approval of the completed form. From this page, you have the option to approve or deny the event. There is also a comments section with each event form where students, advisors, and various campus entities can ask questions or offer suggestions to assist the organization in having a successful event. Campus entities include Hospitality and Event Services, Transportation Services, University Police Department, Student Activities, Environmental Health and Safety, the Memorial Student Center, Rec Sports, and Residence Life. It is important that you as an advisor choose to approve or deny the event after you feel the appropriate information has been presented, and all entities have provided their recommendations. Please keep in mind that the advisor is the only individual with the authority to approve or deny an event. All completed forms will be archived for future reference.

To learn more about Maroon Link, please visit maroonlink.tamu.edu and click on the “To get started, click here” button.

Risk Identification

Consider risks related to the following categories:

1. **Physical**: Injuries arising from physical activities, improper food handling, accidents during travel, natural disasters, etc.
2. **Reputational**: Damage to the individual students' reputation, the image of the student organization, or the reputation of Texas A&M University
3. **Emotional**: Damage to the emotional well-being of members or other event participants
4. **Financial**: Budgetary losses or potentially unexpected costs
5. **Facilities**: Damage to or neglect of event facilities, or conditions that endanger the safety of participants

When assisting the organization with their event plans, it is important to help the students identify potential risks before they occur. The following are five areas of risk that should be consider when planning your event:

Physical risks include injuries arising from physical activities, improper food handling, accidents during travel, natural disasters, etc.

Reputational risk include damage to the individual students' reputation, the image of the student organization, or the reputation of Texas A&M University

Emotional risk include damage to the emotional well-being of members or other event participants

Financial risks include budgetary losses or potentially unexpected costs

Facilities risks include damage to or neglect of event facilities, or conditions that endanger the safety of participants

Risk Assessment

Accept

- Willing to endure consequences of risk

Modify

- Who can help the organization do this?

Transfer

- Insurance is available through Student Activities

Eliminate

- How else can the organization accomplish their goals?

When evaluating the risks involved, organizations can choose to accept, modify, transfer, or eliminate the risks. If an organization decides to accept the risk, they are willing to endure the consequences of that risk in order to conduct the activity. It is always important to have a response plan in place when choosing to accept risk of any level.

If an organization chooses to modify the activity in an effort to minimize the impact of a risk, they should ask, “Who else can help us do this?” At Texas A&M, we are privileged to have many experts, including you as advisors, that are available to help students with their event planning and decision making, and we encourage them to seek out additional assistance when necessary.

Transferring risk can be an appropriate option, and we encourage the organization to work with their advisor in order to determine the most effective way to do this. Staff on the Student Organization Development and Administration (or SODA) team in the Department of Student Activities are available to assist students and advisors with this as well. One common way to transfer risks includes securing insurance to cover the event. Student Activities can assist in this process, but extra time may be needed in order to secure affordable insurance quotes for the organization. The completion of a Maroon Link Event form will be required in the insurance process.

Finally, an organization may decide that the risks of an activity outweigh the benefits. In

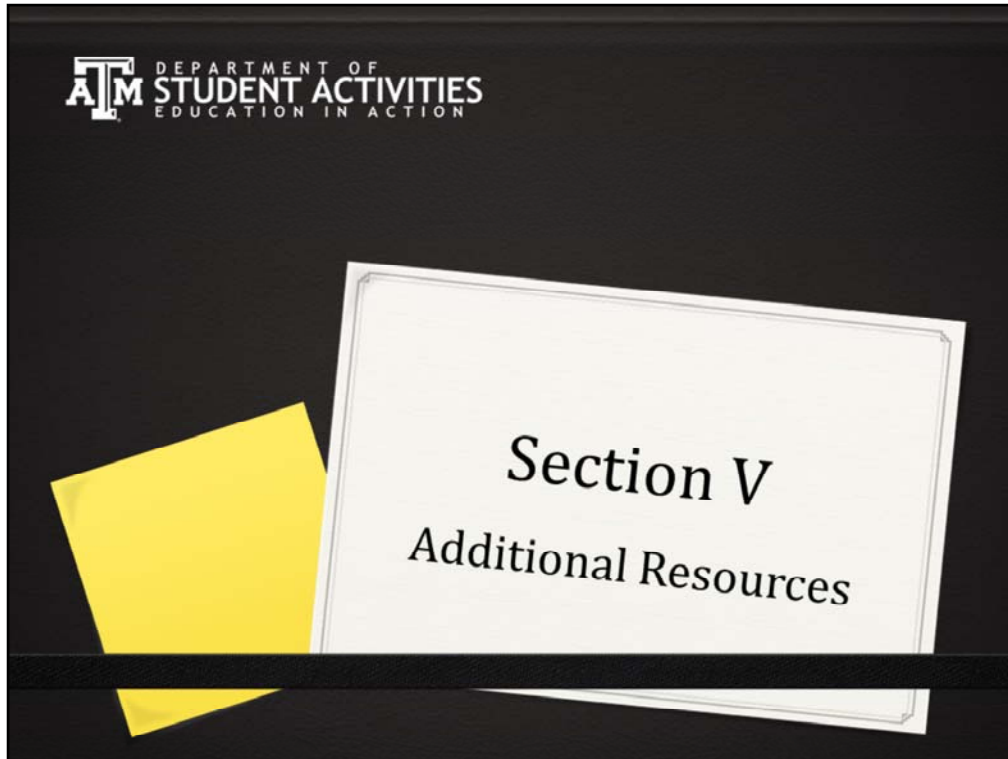
this case, eliminating or avoiding the risk altogether may be appropriate. It is important to note, however, that eliminating a risk does not necessarily mean eliminating the overall program, activity or event. The organization should ask, "How else can we accomplish our goals?" because there is likely a less risky alternative.

Event Planning Reminders

Student leaders are responsible for completing the Maroon Link Event Form.

As an advisor, you should *be aware* of your group's activities, *facilitate discussion* about the event planning process and relevant resources, and if necessary, *prevent* the organization from making a poor decision that could trigger a critical incident.

As you work with your students on their event plans, please keep your advisor role in mind. Student leaders will be responsible for completing the Maroon Link Event Form, and as an advisor, you should be aware of your group's activities, facilitate discussion about the event planning process and relevant resources, and if necessary, prevent the organization from making a poor decision that could trigger a critical incident.



We hope that the information shared in this training module has been helpful as you begin to serve, or continue to serve, in your role as a student organization advisor.

We encourage you to explore the other resources that are made available to you through the Department of Student Activities and Texas A&M University, including:

Online Resources

Advisopedia

An advisor resource center that includes a training center, advising articles, and advising news



stuact.tamu.edu/advisors

StuAct Online

The online resource center for the Department of Student Activities



stuact.tamu.edu

Student Org Manual

Tools and guidelines for student organizations



orgmanual.tamu.edu

Advisopedia – an online resource for student organization advisors, StuAct Online – the online resource center for Student Activities, and the Student Organization Manual which provides comprehensive tools and guidelines for student organizations.

StuAct Specialty Areas

Student Organization Development and Administration

Advisor resources, student organization recognition, event planning, officer trainings, sales and transactions, and more...



979.845.1133



risk@stuact.tamu.edu

SOFC Student Organization Finance Center

The on-campus bank for
recognized student organizations



sofc.tamu.edu

LSC Leadership & Service Center

Personal and organizational
development opportunities



leadandserve.tamu.edu

Student Organization Development and Administration, the Student Organization Finance Center, and the Leadership and Service Center – all areas within the Department of Student Activities that provide valuable services and resources to student organizations such as officer training and event planning, free on-campus banking, and personal or organizational development opportunities for student leaders.

Rules and Regulations

Student Rules

- Student Rule 24:
Student Conduct Code
- Student Rule 41:
Recognition of Student Organizations
- Student Rule 42:
Activities of Student Organizations
- Appendix XI:
Expressive Activity



student-rules.tamu.edu

CEP Camps & Enrichment Programs

Complete the online CEP application, explore forms and resources relating to CEP, and find contact information



camps.tamu.edu

SAPS Standard Administrative Procedures

- Camps & Enrichment Programs
- Student Travel Rule



rules-saps.tamu.edu

And finally, Texas A&M's rules and regulations websites which will help you learn more about student and university rules that apply to student organizations and their activities.

Thank You!

- Please complete the Advisor Essentials Module Quiz and the Advisor Acknowledgement of Expectations to receive training credit for this module.
- Thank you for your service to Texas A&M University recognized student organizations!

Please be sure to complete the Advisor Essentials Module Quiz and the Advisor Acknowledgement of Expectations to receive training credit for this module. We wish you and your student organization the best of luck for the coming year, and again, thank you for your dedicated service to Texas A&M University recognized student organizations!