

Howdy! Thank you for choosing the Pre-Event Planning Form Training module: KNOWING WHAT TO DO WITH YOUR PEP. PEP is the abbreviation of Pre-Event Planning and you'll hear that throughout the module. This training will count for one credit towards your requirement and has been developed for both advisors and student leaders. We hope to walk you through all three phases of event planning. The most important part to remember as we move forward is that it's all in the attitude!

It's all in the attitude...

- You want to be successful for your organization
- While things outside of your control may go wrong, there are certain things we **can** prevent, and that's the point!
- It may seem like a pain or lame, but it'll be better in the long run
- It gets easier, it just takes practice!

Your attitude toward the whole event planning process will determine quite a few things. First and for most, it will determine the level of success of your event. Everyone wants to have successful events for their organization, right? Well, it all starts right here. You determine the level of success by how much pre planning and proactive risk management your organization is willing to do. And yes, all this pre event planning can't stop things that are outside of your control, but when you really think about it, there are things that you absolutely know could potentially go wrong. If you take a positive attitude about identifying them, then you can prevent them from happening, and we're here to show you how.

All this pro-active pre-planning talk may seem lame, but really, it's all in how you approach this responsibility. Sure, you can do just enough to get by, but at the end of the day the only thing you're hurting is the organization's success. This form has been intentionally developed to give you all the direction to plan, implement and assess a great event. If you take the time to do it right, the whole process becomes easier...you just have to stick to it! Today, you'll specifically learn:

Today's Learning Outcomes

- Know basic information about where the form is located and how to fill it out
- Understand the importance of relating events to the mission of the organization
- Know what StuAct expects in a PEP form
- Know how and where to list mitigation plans
- Know the process StuAct will use when reviewing PEP forms
- Understand the benefits and know how to complete an effective assessment of the event

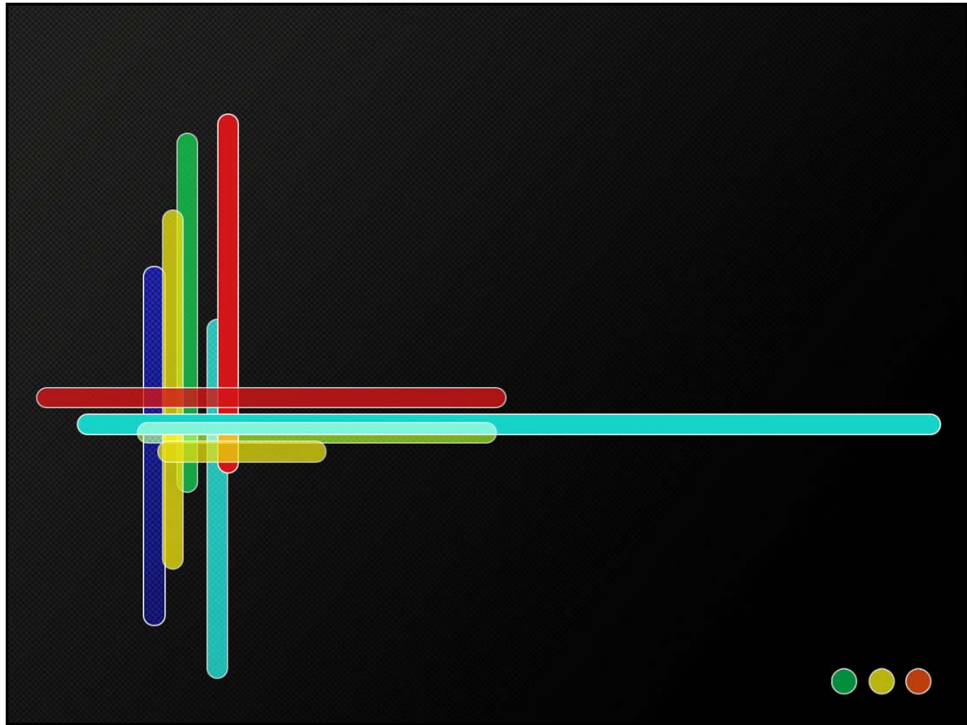
- The basic information about where the form is located and how to fill it out
- You'll Understand the importance of relating events to the mission of the organization
- You'll also know what Student Activities expects in a PEP form
- As well as how and where to list mitigation plans
- After today you'll know the process Student Activities uses when reviewing PEP forms
- And lastly, you'll understand the benefits of and proper way to complete an effective assessment of your event

Before we get started:

Before we begin...

Here is some basic info about
where to find the form and
a helpful guide
to each part of the form

Let's be sure you can find the form and have a basic understanding about the purpose of each section of the form...listen and look carefully as the video plays.



The Form...

- Follow the directions!
- Save it and come back later if you need to
- Do it right the first time!
- Advisors should review and sign off on your PEP forms

The form isn't very daunting once you know your way around it. Now that you've seen it, you understand that it's very self-explanatory, and all you've got to do is follow the directions. Always remember that you can save each page and come back to it later to finish filling it out, so don't feel pressured to finish it all at one time. John Wooden, one of the greatest college basketball coaches of all time, once said, "If you don't take the time to do it right, when will you take the time to do it over?" So do it right the first time! Another very important reminder is to have the advisor of your organization review and sign off on all PEP forms. For this reason, we strongly recommend that advisors be a part of the entire pre-event planning process. They can and should offer guidance each step of the way.

The PEP process itself is only three steps.

3 Steps: Plan, Implement, Assess

Plan



Implement



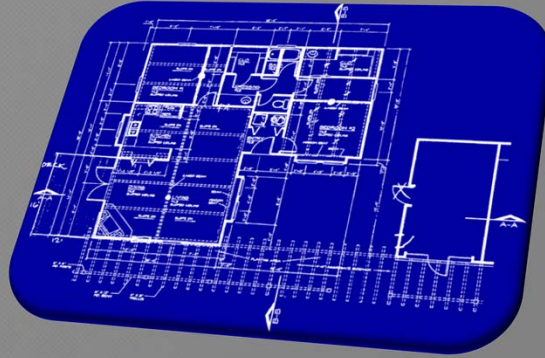
Assess



The easiest way to think about the process is just like building a house. You'll need blueprints, the actual event of constructing the house, and lastly the assessment of your work. Each of the phases of home building easily represents the phases of Pre-Event Planning. The blue print phase is all the work you need to do BEFORE you can put on a successful event. All the blueprint info is what goes on the PEP form. Building the house is a lot like putting on the actual event - lots of people working together and all the plans culminating into a successful implementation. The last part is just as important as all the rest. It is the assessment. The only way events become better each year, is if we take the time to look back and determine what went well and what will need improvements next time we decide to build.

Now that we recognize each phase, we can go through them one at a time.

Phase I: Plan



The blue prints! The big plans...in this section we will cover appropriate risk management and how to get the best information possible in your PEP form. It all begins with the mission of your organization.

Your Mission...



- Why does your organization exist in the first place?
- Why is the mission so important, individually & for your organization's reputation?
- It *IS* who you are...and it *IS* what others expect from you
- In your PEP form, you should...

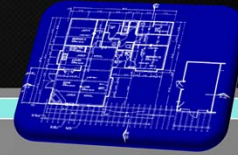


When was the last time you read the documented mission of your organization? I ask this, because often, student leaders get so busy with their day to day leadership work that they lose sight of the true mission of the organization. It is important to remember that the group exists because of the mission. All the work you group does should always align and relate to the accomplishment of the organizations true mission.

The mission of your organization is more than just words on paper. It is the tie that binds us all to our functionality with the group and the university. If you continuously do things that have nothing to do with your mission, you run the risk of damaging the organizations reputation because you are not accomplishing the things it was originally created for. Your mission *IS* who you are...and it *IS* what others expect from you. When you become a leader you make a promise to your organization and to the university that you will uphold the mission and provide leadership to a group of people who all want to fulfill the same mission

Because the mission is so important, is its equally important that your PEP form...

Mission, Vision and Values



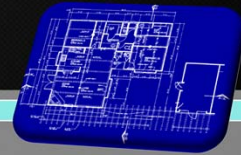
Relate what you are doing at all
organizational events with the
mission of the organization

The successful PEP form will
help you do this!



Relate your organizational events with the mission of the organization. The successful creation of a PEP form will help you do this! But how will you know if the form is successful? Let me offer you some helpful hints about what Student Activities expects to see in the PEP forms.

What StuAct expects



- Well thought out answers to questions
- Details! Details! Details! Prevent bigger questions
- Early submissions
- Clear articulation of Risk Management plans or PREFF assessments...

What's a PREFF??



Tip number one – always provide well-thought out answers. If you react too quickly with the answer and put down the first thing that comes to your mind, you might not have an appropriate amount of information for the review. Which brings us to tip number two: DETAILS! Remember, the person reviewing your PEP form only has the context that you provide on the form. The less information you put on that form, the more questions the reviewer will have to ask. The more questions the reviewer has the longer the process takes. Sometimes that process can take weeks, so don't forget our next tip. Tip number three get your forms in early!! The earlier the better, and if possible, no less than 10 business days before the event. This will allow enough time for the reviewer to check your PREFF assessment, and that's tip number 4. Be clear about your complete PREFF assessment and mitigation plans. So, right about now you might be thinking what's a PREFF assessment? Well, let me explain.

PREFF: A systematic approach



1. Identify potential risks before they occur
 - Physical
 - Reputational
 - Emotional
 - Financial
 - Facilities
2. Assess the probability and consequences of the risks
3. Decide to accept, modify, transfer, and/or eliminate the risks

PREFF is a systematic approach to appropriately identifying and mitigating any foreseeable risks. In other words, it's a way to easily risk manage any event. Let's start with step one, and that is to identify any potential risks associated with PREFF...The letters stand for the categories of risk you need to be aware of when planning your event. Let's define them now. Physical – any minor or major injuries to the physical body of anyone at your event. Reputational which means how the event will reflect on the persons present, the organization itself or the university. Emotional risks which involve the potential for your event to evoke strong emotions from those interacting with your event such as feelings of fear, humiliation, offense, exclusivity or any other strong emotion. Financial stands for the risks associated with the budget and spending, and lastly Facilities risks which include several different things such as using the appropriate space for the event, any equipment needed or being used, and even having inclement weather plans if you are hosting an event outdoors.

When you decide on the event, you should create a list of any foreseeable risk associated in the PREFF categories. For instance if you were a leader in the sewing club what would be a foreseeable physical risk? (pause) If you're thinking "stabbing your finger with a needle," you are absolutely right. Any reasonable person would be able to know that the sewing club will potentially have a member or participant who might puncture a finger while sewing, so knowing that, the student leaders should

determine the probability of this happening and decide whether or not the consequences of this risk call for a mitigation plan. Mitigation means to have a plan to first PREVENT the harm from happening in the first place, as well as having a back up plan incase something goes wrong. Remember, depending on the severity of the risk, you can decide to accept the risk and continue with the activity planned, modify or alter your plans to an acceptable level of risk, transfer the risk to another responsible party, or you can always decide to eliminate the risk all together by changing plans. That's a lot to think about at one time, but here's an easy way to put all those thoughts about PREFF and mitigation plans together.

PREFF made easy...

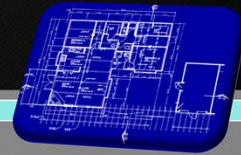


The Sewing Club

| Category | Risks | Plan A | Plan B |
|--------------|-------|--------|--------|
| Physical | | | |
| Reputational | | | |
| Emotional | | | |
| Financial | | | |
| Facilities | | | |

The sewing club is going to do a PREFF assessment. And it's very easy... first, they listed out the categories of risk they want to assess and mitigate. Next, across the top row you'll see that they have space for the foreseeable risks, a column for plan A also known as a prevention plan, and then plan B or the Backup plan.

PREFF made easy...



The Sewing Club

| Category | Risks | Plan A | Plan B |
|--------------|---|--------|--------|
| Physical | Minor Injury due to needle puncture | | |
| Reputational | | | |
| Emotional | | | |
| Financial | | | |
| Facilities | | | |

We determined earlier that a foreseeable physical risk for the sewing club would be needle puncture, so it is listed in the first column.

PREFF made easy...



The Sewing Club

| Category | Risks | Plan A | Plan B |
|--------------|-------------------------------------|--|--------|
| Physical | Minor Injury due to needle puncture | Appropriate safety equipment will be used -Thimbles | |
| Reputational | | | |
| Emotional | | | |
| Financial | | | |
| Facilities | | | |

Now it's up to us to figure out how to prevent someone from stabbing themselves. If you're thinking about thimbles, you're right again! So the mitigation plan would be written down as "Appropriate safety equipment will be used." And then because you need to write a well thought out answer, you'd list the type of safety equipment you will use. In this case, thimbles.

PREFF made easy...

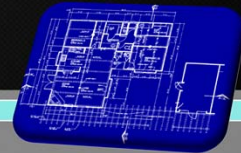


The Sewing Club

| Category | Risks | Plan A | Plan B |
|--------------|-------------------------------------|---|---------------------------------------|
| Physical | Minor Injury due to needle puncture | Appropriate safety equipment will be used -Thimbles | EMT and ambulance at every meeting??? |
| Reputational | | | |
| Emotional | | | |
| Financial | | | |
| Facilities | | | |

Now you and I know that even with all the best laid plans in place, sometimes things just happen. In the sewing club's case, that "something" comes in the form of Clumsy I'mnotverycarefulson who will puncture their figure even if they are wearing a thimble. Which brings us to plan B...but what is an appropriate plan B? For this kind of risk, should the sewing club have an EMT and the ambulance standing by in the parking lot of every sewing club function? Not really necessary don't you think? The truth is you just evaluate the true consequences of the risk and plan appropriately and realistically.

PREFF made easy...



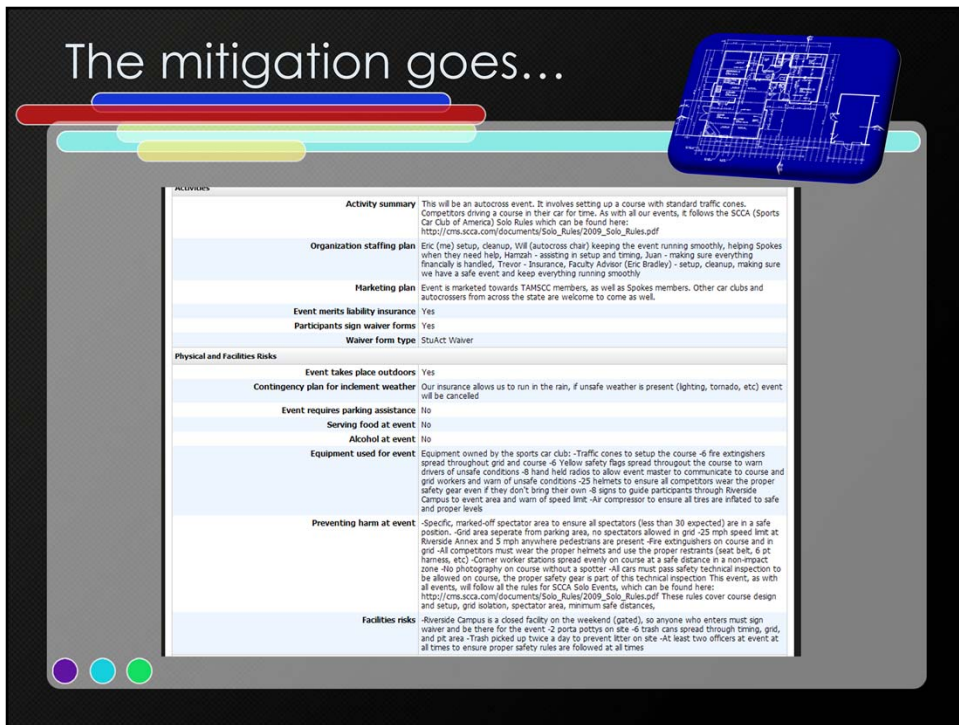
The Sewing Club

| Category | Risks | Plan A | Plan B |
|--------------|-------------------------------------|--|---------------|
| Physical | Minor Injury due to needle puncture | Appropriate safety equipment will be used -Thimbles | First Aid Kit |
| Reputational | | | |
| Emotional | | | |
| Financial | | | |
| Facilities | | | |

The EMT/ambulance standing by is what we would call going over board. If YOU were doing this PREFF assessment, what would you list as an appropriate plan B? (pause) if you said having a first aid kit present, you're right! So at this point, you've completed a full process of good risk management, and you'd use the exact same process for the rest of the categories. Easy, right? I told you it would be.

So now you've done your PREFF plan and you have answers all put together, do you know where would you list all this information on the PEP form? Let's take a look.

The mitigation goes...



| Activity summary | Organization staffing plan | Marketing plan | Event merits liability insurance | Participants sign waiver forms | Waiver form type | Physical and Facilities Risks | Event takes place outdoors | Contingency plan for inclement weather | Event requires parking assistance | Serving food at event | Alcohol at event | Equipment used for event | Preventing harm at event | Facilities risks |
|--|---|--|----------------------------------|--------------------------------|------------------|-------------------------------|----------------------------|--|-----------------------------------|-----------------------|------------------|--|---|---|
| This will be an autocross event. It involves setting up a course with standard traffic cones. Competitors drive a course in their car for time. As with all our events, it follows the SCCA (Sports Car Club of America) Solo Rules which can be found here: http://cms.scca.com/documents/Solo_Rules2009_Solo_Rules.pdf | Eric (me) setup, cleanup, Will (autocross chair) keeping the event running smoothly, helping Spokes when they need help, Hannah - assisting in setup and timing, Juan - making sure everything financially is handled, Trevor - Insurance, Faculty Advisor (Eric Braden) - setup, cleanup, making sure we have a safe event and keep everything running smoothly. | Event is marketed towards TAMSCC members, as well as Spokes members. Other car clubs and autocrossers from across the state are welcome to come as well. | Yes | Yes | StuAct Waiver | | Yes | Our insurance allows us to run in the rain, if unsafe weather is present (lighting, tornado, etc) event will be canceled | No | No | No | Equipment owned by the sports car club: -Traffic cones to setup the course -6 fire extinguishers spread throughout grid and course -6 Yellow safety flags spread throughout the course to warn drivers of unsafe conditions -8 hand held radios to allow event manager to communicate to course and grid workers and warn of unsafe conditions -25 helmets to ensure all competitors wear the proper safety gear even if they don't bring their own -8 signs to guide participants through Riverside Campus to event area and warn of speed limit -Air compressor to ensure all tires are inflated to safe and proper levels | Specific, marked-off spectator area to ensure all spectators (less than 20 expected) are in a safe position. Grid area separate from parking area. No spectators allowed in grid. 25 mph speed limit at Riverside Annex and 5 mph anywhere pedestrians are present. Fire extinguishers on course and in grid. All competitors must wear the proper helmets and use the proper restraints (seat belt, 4 pt harness, etc). Corner worker stations spread evenly on course at a safe distance in a non-impact zone. No photography on course without a spotter. All cars must pass safety technical inspection to be allowed on course, the proper safety gear is part of this technical inspection. This event, as with all events, will follow all the rules for SCCA Solo Events, which can be found here: http://cms.scca.com/documents/Solo_Rules2009_Solo_Rules.pdf These rules cover course design and setup, grid isolation, spectator area, minimum safe distances. | Riverside Campus is a closed facility on the weekend (gated), so anyone who enters must sign waiver and be there for the event. 2 porta potties on site. 4 trash cans spread through timing, grid, and pit area. Trash picked up twice a day to prevent litter on site. At least two officers at event at all times to ensure proper safety rules are followed at all times |

You'll notice that each section of the Pre-Event planning form helps you to identify where to put the appropriate information. Remember, it's up to you to use as much detail as possible. This organization has done a great job of identifying all the necessary information and using a good amount of detail to communicate to the reviewer that they have identified the foreseeable risks, created a mitigation plan and have a back up plan. All of that is placed in the appropriate section provided in form. You will quite literally be prompted to list the information in the categories we discussed with PREFF. A good thing about the PEP form is that you can save each section page by page so you can save and walk away if you need to and come back to it later. Once you have completed the form and confirmed the information, all that's left to do is hit submit. But what happens after you hit submit?

The Review Process



- Advisor receives an email to review the form
- Advisor approves, goes to StuAct
- Student Activities assigns to one person just for you
- Reviewer will read through the form
 - Compliance with university rules and the law
 - Complete well thought out details regarding PREFF
 - Can send it back for improvements

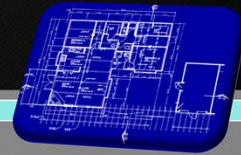
The review process! An email is automatically sent to the organization's advisor. The advisor must review the information and if they find that there is more detail to be used they have an option to decline the form, fill in their notes in the space provided on the form, and send it back to the student leader who submitted the form. At this point it is the responsibility of the advisor to follow up with the student leaders to make appropriate corrections to the form. Open communication between advisors and student leaders is essential for any successful organization, and that is very true for pre-event planning. Student Rule 42 states that it is expected that all student organizations will have their events, whether on or off campus, reviewed by their advisor, so make sure you are allowing your advisor to fulfill this expectation. Once your advisor feels the organization is ready to move forward, they will type in their initials and hit submit. When the advisors initial the form, they are saying that they reviewed and agree with the plans and information provided in the form. The next stop is Student Activities.

The Dept of Student Activities will assign one person to review your PEP form. This is important, because we want our student leaders to feel they have one point of contact to help support them as they move forward with their event. On your organization's profile, under your important updates section, you will be notified when the form is being reviewed by Student Activities. Your reviewer can help answer your questions, tell you about resources, and provide positive feedback on best

practices in risk management for events similar to yours. The reviewer will carefully go over your form and as they do, they will be looking for the following: compliance with university rules and the law. Complete well thought out plans regarding PREFF and lastly if they feel more information is needed, they will let you know that the form is being returned to you for updates. You will receive an email notifying you if your PEP form needs to be changed. If your PEP form is reviewed and does not need any further updates, the reviewer will archive it, and the status will be indicated in your important updates section on your profile. The great thing about the form being archived is that we keep them online forever. This is very beneficial for organizations who submit PEP forms for yearly events. The archived forms help with transition of officers who plan the event, and they also help to make each year better.

Before we move on, I'd like to share a few last minute tips with you...these are the "please don't".

Some don'ts



- Do NOT use one sentence answers where an open field is provided
- Do NOT worry about info that “might change”
- Do NOT submit the form unless you are able to answer our questions about it
- Do NOT hesitate to ask questions!

The first one is please don't use one sentence answers. As I've stated before, if you choose not to have well thought out and detailed answers, this will only lead to more questions during the review. If you'd like the process to run smoothly, the best thing to do is use as much detail as possible.

Next, please don't worry if you are filling out the form ahead of time and do not have confirmed logistical information. The PEP form information like place, time, and date can always be updated through open communication with your reviewer. They can add notes to your form that you will be able to see and this can include updates as needed.

The next thing you need to know is that the submitter of the PEP form is going to be the Student Activities' point of contact. We will call or email that person first with questions we might have, and if others are contributing to the event plans without appropriate communication to the submitter, it can and will make answering those questions difficult. This is something that could potentially slow the review process. So, as a submitter, make sure that you feel confident in your abilities to answer questions and provide accurate information.

And lastly, DO NOT hesitate to contact Student Activities if you have any questions

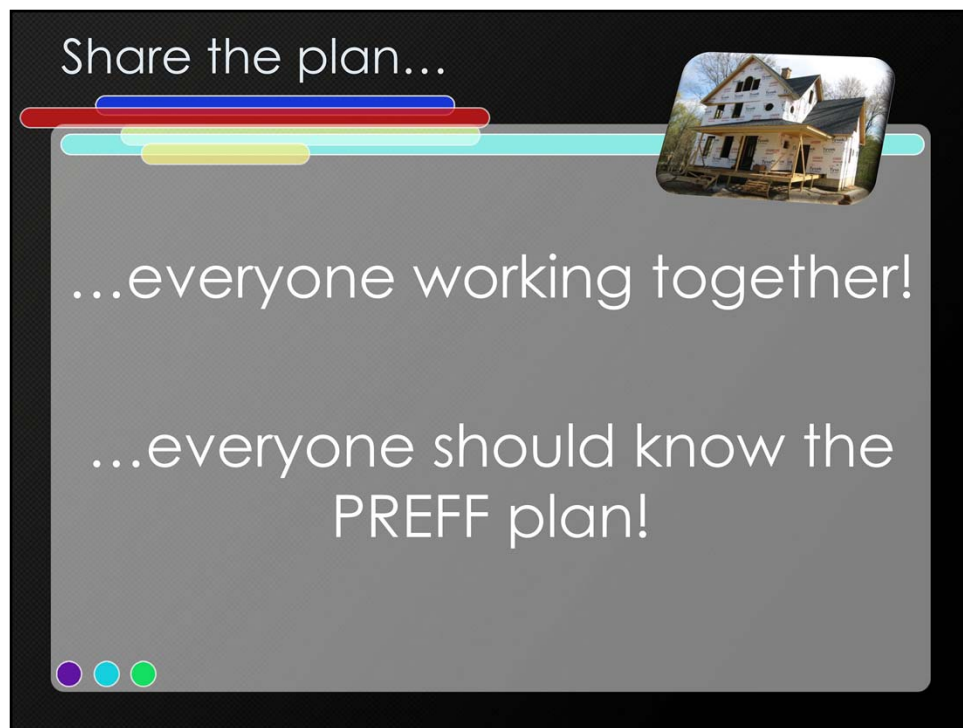
during the entire PEP process.

And now, the process has led us to Phase II.

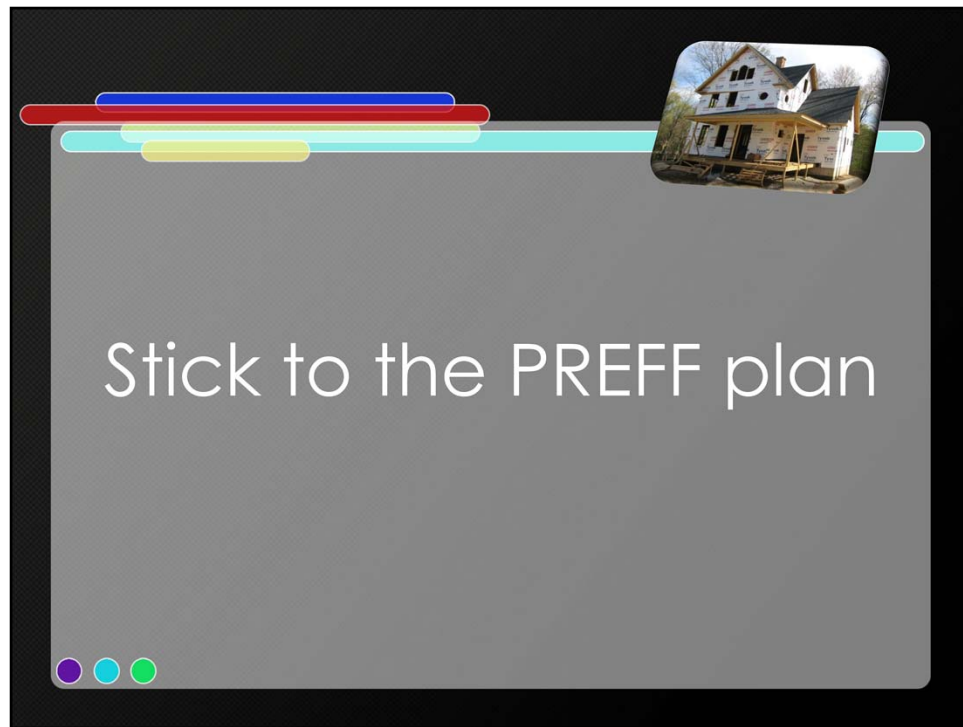
Phase II: Implement



It's time to implement all your GREAT plans and put into action your risk management. So as you move forward with the implementation it will be extremely important for you to



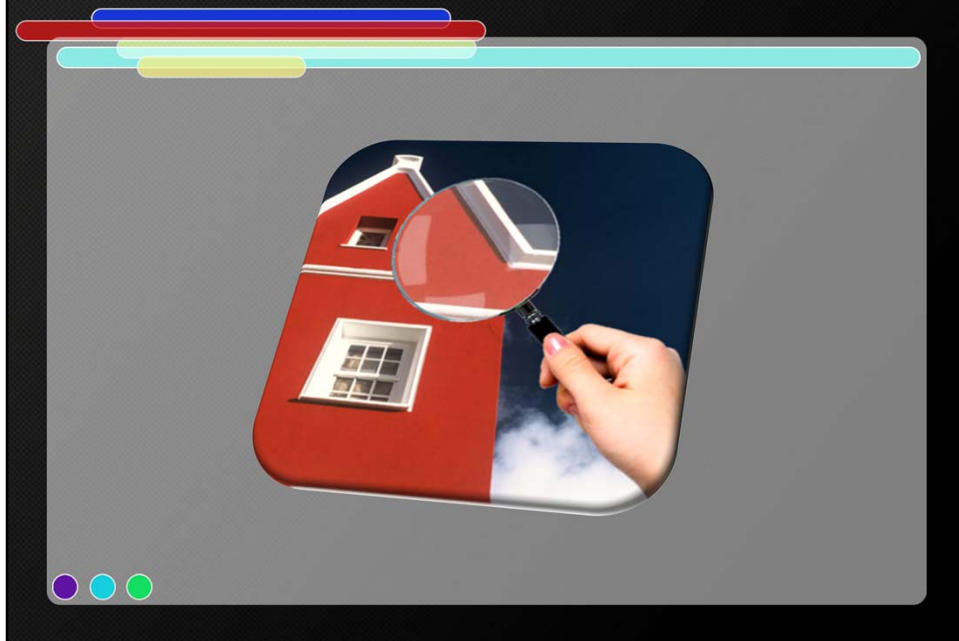
Share the plan! It does absolutely no good for you to put in all that hard work on the PREFF assessment, mitigation plan and Pre-Event planning form and then walk away the only person who knows what to do if something happens. Remember, in order to have a truly successful event, it will take everyone working together, and the best way for a student leader to facilitate that is by sharing all the information they laid out in their blue print. This is even more important with the details of the PREFF plan! Everyone involved with implementation of a successful event should know exactly what to do, how the organization plans to prevent harm from happening, and also what the back up plans will be in case something goes wrong. This is the responsibility of the leadership and the advisor. Sharing the plans with everyone will insure that as an organization you



Stick to the PREFF plan. This is especially important because the information you provided in your Pre-Event Planning form can potentially be used as legal documentation. If you choose to alter or neglect your own plans, this could potentially lead to liability. If you would like more information about the legal liabilities associated with event planning as an organization, please contact Student Activities.

Another reason to stick to the plan is to help measure the success of the event. You should be taking notes of what went well and what didn't go well during the implementation, because it will help you as we move in to Phase III.

Phase III: Assess



Assessment promotes so many positive things for organizations; it's hard to know where to start! The most important thing to remember is that if you don't take the time to assess how your event went, how will it ever grow and get better? It is only when we analyze our successes and failures equally, that we provide ourselves the opportunity for true growth. Your organization events can not grow without the opportunity to understand what they do well and what they need to improve upon. In order to this you must understand that...

Assessment is a good thing!



- Get feedback from as many people as possible
- Email headed your way!
- Information saved for transition

Assessment can help you and your organization. First you'll need to collect as much feedback from as many people as possible. This includes members of your organization as well as participants. The more perspectives you get, the more detailed information you'll have to help the organization.

Approximately three days after your event date, you will receive an email from Student Activities. This email will prompt you to re visit your PEP form and add any assessment notes or helpful information you'd like to save. This will greatly enhance the transition process from officer to officer or event planner to event planner. The form and all the notes are saved under your resources tab in StuAct Online. Click on "Pre-Event Planning Forms" and it will take you to the page that holds all submitted PEP forms as well as the link to create a new form.

If you have never really considered creating assessments or evaluations of your event, we do have resources that can greatly help you.

Assessment Resources

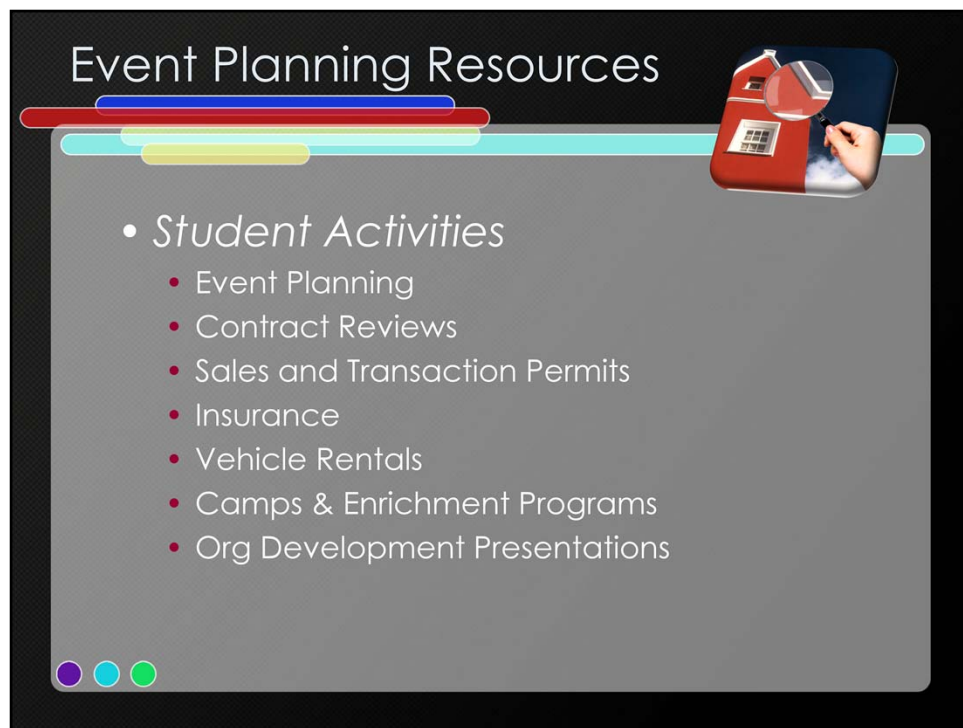


Student Life Studies

- Cain Hall, 3rd Floor
- Student Organization Assessment Center
- Student Leader Learning Outcomes



The first is Student Life Studies. This office is located on the 3rd floor of Cain hall and provides services through the Student Organization Assessment Center. This center will help walk you through options of how to assess just about anything from your organization as a whole or to specific event plans. They can also help provide guidance and leadership development through the Student Leader Learning Outcomes project. The Student Leader Learning Outcomes (SLLO) Project provides methods and tools for staff throughout Texas A&M University to use with student leaders in student organizations, programs, or activities to help in the assessment and documentation of enhanced learning in relation to the students' leadership experiences. The project is sponsored by the Division of Student Affairs and has broad participation of organization advisors and others who work closely with students.



Event Planning Resources

- *Student Activities*

- Event Planning
- Contract Reviews
- Sales and Transaction Permits
- Insurance
- Vehicle Rentals
- Camps & Enrichment Programs
- Org Development Presentations

You can also seek additional resources through the Department of Student Activities. A few of these resources are

- Event Planning
- Contract Reviews
- Sales and Transaction Permits
- Insurance
- Vehicle Rentals
- Camps & Enrichment Programs
- Org Development Presentations

For more information about these resources or any PEP form questions you might have, please feel free to...

QUESTIONS??



Department of Student Activities

Student Organization Development & Administration



979.845.1133



risk@stuact.tamu.edu



Contact the department of Student Activities at 979-845-1133 or email us at risk@stuact.tamu.edu

Thank you for listening and we look forward to working with you when you plan your next successful event!