PRE-EVENT PLANNING FORM

Name of Organization: ____________________________________________

Individual(s) Responsible for Coordinating Event ____________________________________________

Title of Event/Activity: ____________________________________________  Name   email

Type of Event:  
☐ Fundraiser   ☐ Conference/Seminar   ☐ Program
☐ Retreat   ☐ Social Activity   ☐ Other ________________ (describe)

Dates of Event: ____________________________________________  
(Make sure that you have consulted the University Calendar to determine if the date is available and is the optimal time for hosting this type of event.)

Location: ____________________________________________  (Make sure you have reserved the facility.
See: http://studentactivities.tamu.edu/risk/eventplanning/oncampusrooms.htm)

Backup location in case of bad weather: ____________________________________________

Start Time: ____________________  End Time: ____________________

Other academic departments or student organizations involved
(Note: this could also include any national organization involved in the activity.)

Estimate the Number of People Attending: ________________________

Purpose for Submitting Form:
☐ Van Rental
☐ Concessions Permit Request
☐ Risk Initiative Funding
☐ Insurance Request
☐ Advisor Required
☐ Organization Required
☐ Risk Management Review
☐ Other ___________________
How does this event promote the mission and purpose of your organization?
Introduction:
One key to a successful event is good planning. This pre-event planning form provides your organization a series of questions to consider prior to engaging in an activity. This is a great tool for students and advisors; we recommend that all the leaders of your organization and your advisor participate in the planning process. That way, your entire group is working together and understands your organization’s direction.

Please keep in mind that all activities should be consistent with university rules, policies, and procedures as well as the mission/purpose of your organization.

1. Provide a brief description of the event/activity that you are planning:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

2. Fill out the worksheet below to demonstrate your approach to managing risks:

<table>
<thead>
<tr>
<th>Activities</th>
<th>Associated Risks</th>
<th>Management Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Travel to retreat location</td>
<td>1. Drowsy driving or Compliance with Student Travel Rule requirements</td>
<td>1. Depart at a reasonable time with well rested drivers</td>
</tr>
<tr>
<td>2. Fiscal issues</td>
<td>2. Loss of revenue - Not enough funds to cover all expenses</td>
<td>1. Review rule and complete all required SAP requirements</td>
</tr>
<tr>
<td>3. Negative Impact on Members of the Community</td>
<td>3. Alienate other students by promoting negative stereotypes or anti-support messages being sent</td>
<td>2. Generate a budget for the event that is grounded in actual money in accounts</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Carefully review plans for event from a community perspective, make sure to focus efforts on issues education and not anti-messages</td>
</tr>
</tbody>
</table>

3. What resources have you consulted prior to determining that you can adequately manage this event?
   □ Student Organization Advisor
   □ Student Activities Risk Management Specialist
4. **Have been required to purchase liability insurance? Are you considering purchasing it?**
   - Yes □ No □
   - For assistance with purchasing liability insurance or with determining if your event could have liability insurance, contact a representative from the Department of Student Activities Risk Management team at (979) 845-1133 or risk@stuact.tamu.edu.

5. **Are you using an assumption of risk/waiver, medical release, and emergency contact form?**
   - Yes □ No □
   - See sample forms here: [http://studentactivities.tamu.edu/risk/liabilityinfo.htm#assumptionforms](http://studentactivities.tamu.edu/risk/liabilityinfo.htm#assumptionforms)
   - For assistance further developing these forms, contact a representative of the Department of Student Activities Risk Management team in 125 John J. Koldus, or call (979) 845-1133.

6. **Does your program involve physical activity?**
   - Yes □ No □
   - Plan ahead for medical emergencies. To secure EMS Personnel, contact the Emergency Care Team at (979) 845-4321. Also consider developing an assumption of risk form to be signed by all participants. (See # 5, above.)

7. **Are you traveling?**
   - Yes □ No □
   - Call a member of the Department of Student Activities Risk Management team for more information. (979) 845-1133

8. **If you are traveling, what type of transportation are you using?**
   - Personal Vehicle □ University Vehicle □ Commercial Plane □
   - Rental Car □ University/Chartered Bus □ Other □
   - You are always encouraged to use the Texas A&M Critical Incident Response Team (C.I.R.T.) website. Find it here: [http://studentlife.tamu.edu/co/cirt.htm](http://studentlife.tamu.edu/co/cirt.htm).
   - Note: you will need the names, student ID number, and emergency contact information for each student traveling to complete the online process.

9. **Is your event outdoors, or can your event be affected by inclement weather?**
   - Yes □ No □
   - Check ahead for weather conditions at [http://www.weather.com](http://www.weather.com)
   - Check location ahead of time for shelter
   - Bring adequate clothing
   - Plan for alternative rain location.
   - Bring a radio with you to monitor changing weather conditions.
   - If your event is on campus, review the TAMU Lightning Prediction System information at [http://finance.tamu.edu/ehsd/information/Interest/CampusLightningSystem.htm](http://finance.tamu.edu/ehsd/information/Interest/CampusLightningSystem.htm).
   - For more information, contact a member of the Department of Student Activities Risk Management team at (979) 845-1133.

10. **Will your event require the assistance of the University Police for security and/or Parking, Traffic, and Transportation Services for parking and traffic control?**
    - Yes □ No □
For assistance contact the University Police Department at (979) 845-8097 and/or Parking, Traffic, and Transportation Services at (979) 845-9700.
11. Is your activity an Open Event? (Open to the campus, general public, or students at other colleges or universities and expected to draw over 200 participants)  
☐ Yes  ☐ No  
Fill out the open event policy form: [http://studentactivities.tamu.edu/risk/eventplanning.htm](http://studentactivities.tamu.edu/risk/eventplanning.htm), pick up the information at 107 Rudder Theatre, or call (979) 845-8901 or 125 Koldus, or call 845-1133.

12. Is there alcohol involved with your activity?  
☐ Yes  ☐ No  
Review the policies and rules related to alcohol and student organizations at [http://studentactivities.tamu.edu/risk/alcohol.htm](http://studentactivities.tamu.edu/risk/alcohol.htm). You may also pick up the information at 125 John J. Koldus, or call (979) 845-1133 for more information.

13. Are you contracting a service from a non-university entity?  
☐ Yes  ☐ No  
Visit with your organization advisor, or a member of the Risk Management Staff, located in office 125 of the Koldus building or call 458-4371. You may also be required to work with Contract Administration, [http://contracts.tamu.edu](http://contracts.tamu.edu) on vending/speaker/consultant/entertainment contracts. You may also contact John Schwartz in the Department of Student Activities at (979) 845-1133.

14. Does your event involve the sale/distribution of items on campus?  
☐ Yes  ☐ No  
Complete the appropriate concessions forms: [http://studentactivities.tamu.edu/guidelinesact/concessionsguidelines.htm](http://studentactivities.tamu.edu/guidelinesact/concessionsguidelines.htm). You may also get forms and more information in 125 John J. Koldus, or by calling (979) 845-1133.

15. Are you planning on posting flyers or advertising on campus?  
☐ Yes  ☐ No  
Please review the General Publicity & Posting Guidelines. See [http://stuact.tamu.edu/manual9900/adver9900.html](http://stuact.tamu.edu/manual9900/adver9900.html). If you have questions, please call the Department of Student Activities at (979) 845-1133.

16. Are you using a TAMU logo or trademark in association with your activity (i.e. t-shirts)?  
☐ Yes  ☐ No  
Get your design approved by Collegiate Licensing. Visit them at 213 Richard Coke Building, MS1137, or call (979) 845-4621 for more information.

17. Have you reviewed your budget and purchasing guidelines as it relates to this event/activity?  
☐ Yes  ☐ No  
For information about financial policies and procedures, visit the Student Organization Finance Center on-line at [http://sofc.tamu.edu/](http://sofc.tamu.edu/), stop by 217 MSC, or call (979) 845-1114.

Our organization completed this Pre-Event Planning Form on ______________________ (date).  

_____________________________  _________________________________  
(Signature of Student Leader)   (Signature of Advisor)
1. Was your event a success? Why or why not?

_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________

2. Did you encounter any unforeseen problems? If yes, how can you better prepare in the future?

_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________

3. Are you going to continue the event?
   ___ Yes
   ___ No

_____________________________________________________________________

4. If yes, what changes would you recommend for the following year?

_____________________________________________________________________
_____________________________________________________________________

Completed on this date: _____________________

(Signature of Student Leader)   (Signature of Advisor)

Please keep a copy of this in your organization’s history file.