

OPERATIONS MANUAL INFORMATION SHEET

What is an Operations Manual?

An Operations Manual can be a valuable tool for everyone in your organization! This document serves as a resource for any member of your organization who is planning an organizational event or activity, or who is making a decision that might impact the organization. It also serves as an important record of the guidelines, procedures, and expectations set by your organization, and can be an effective tool for training and transitioning new leaders. Your Operations Manual should be developed and maintained under the supervision of your organization's Risk Management Officer.

What should I include in my Operations Manual?

All organizational guidelines, procedures, and expectations should appear in your Operations Manual, along with any important information that you think should be available to your members. The Operations Manual should be the first place a member turns when there is a question about the organization's standards or procedures. Although you will want your manual to reflect the unique needs of your organization, the following are basic components that should be standard for any Operations Manual:

I. Governing Documents

Constitution & Bylaws
Mission Statement
Vision Statement
Core Values
Goals & Action Plans (for the current year)
History of Change(s) to Governing Documents and Explanation/Reason for Change(s)

II. Officers

Job Descriptions and Responsibilities
- This section should include generic officer information, (ie. General descriptions of each office) as well as specific information about the current year's officers. When the year is done, and it is time to transition, the general descriptions can stay and the specific information can be updated.
Organizational Chart
- Again, as above, there should be a generic organizational chart and a year-specific organizational chart.
Contact Information
- This should be specific to the current year.
Transition Procedures

III. Advisors

Advisor Agreement Letter
- Include this each year (and keep a copy of the previous year)
Expected Role(s) and Responsibilities
- A good source for this information, although it should be personalized for each group, can be found on the Student Activities website at <http://studentactivities.tamu.edu/recognition/AdvisorExpectationsChecklist.htm>
Contact Information
- As above, this information should be continually updated so that it always remains current.

IV. Standard Operating Procedures

Membership Standards & Procedures
- These might also be in the Constitution/By-Laws Section
Discipline Procedures
- This section can be very important. (It should also be prominently placed in your Constitution or By-Laws.) Although it is hoped that they will not have to be used, these procedures must be clear and concise. Most importantly, when it is necessary to use discipline procedures, the rules must be followed/implemented exactly as they are written. For model discipline rules, see the Texas A&M Student Rules at <http://student-rules.tamu.edu/>
Publicity & Media Relations Guidelines
Concessions & Sales Guidelines
- See <http://studentactivities.tamu.edu/concessions>
- The guidelines/rules listed in the above website will help your group plan for the advertising of events and/or the sale of goods on campus. You might want to print the guidelines and include them in this section.
Budget Process & Financial Guidelines
- See <http://sofc.tamu.edu/>
Important Phone Numbers, Websites, & Resources

V. Risk Management

Pre-Event Planning Procedures

- Make sure that you have an example of the most up-to-date copy of the Pre-Event Planning form, available on the Student Activities website. Your group can decide to require the use of one of these forms anytime a group activity is undertaken. Although Student Activities does NOT require that a Pre-Event Planning form be used for every event, we highly encourage groups to take advantage of the planning help that they provide. Also, realize that many departments or areas on campus DO require the use of the forms, so it will be very helpful to have a copy easily accessible in your operations manual.

Travel Procedures & Guidelines

- As of February 2002, there is a new Standard Administrative Policy (SAP) that affects student travel. A link to the rule from the Student Activities web page may be found here: <http://studentactivities.tamu.edu/risk/travel>.
- Essentially, this new SAP needs to be followed by student organizations when they are traveling more than 25 miles from the Bryan/College Station area and their activity is:
 1. sponsored by the University
 2. funded by the University, and the travel is undertaken using a vehicle owned or leased by the University; or
 3. required by a student organization registered at the University.
- Groups should include a copy of this SAP in their operations manual.
- If the specifics of a student organization activity do not require compliance with the above SAP, there are other standards that the group should follow when traveling. A group should include a section stating that all members who will serve as drivers to/from group activities are expected to be currently licensed and insured. You should also make it known to members that those who do volunteer to drive are taking on additional responsibilities. For example, it will THEIR insurance that will be used if there is an accident and THEY are responsible for following all safe driving procedures, as well as all traffic rules. Finally, this section should contain detailed information about the group's responsibility to notify the Texas A&M Critical Incident Response Team (CIRT) before any group travel is started. Information on CIRT guidelines can be found at <http://studentactivities.tamu.edu/riskmanagement>. For even more general information, see <http://studentactivities.tamu.edu/risk/travelinfofiles/sactguidelines.htm>.

Safety & Liability Guidelines

- This section should contain pertinent to your group's activities. For example, if your group participates in certain events, the proper procedures/protocol should be listed here. Examples: if your group follows guidelines from a national organization; if your group has developed methods to enhance participant safety; if there is information that participants in your group's activities should be required to know BEFORE they participate' etc.

Crisis Response Procedures

- This section should contain detailed information about how your group plans to proceed in the event of an emergency. For example: who is in charge? Who will notify the proper authorities, both emergency personnel and/or Student Activities staff members?

Texas A&M Student Rules

- Alcohol & Drug Use
- Hazing
- Sexual Harassment
- Discrimination

- The Texas A&M policies on the above subjects may be found at <http://student-rules.tamu.edu/index.htm>. Please note: although your group-specific rules may be MORE strict than the TAMU Student Rules, under no circumstance may the rules be LESS strict.

VI. Organizational History

- This is a very important section. It can serve as the history of your group and will serve as a guide for those students participating in the group in years to come. In some ways, this section might even be considered as part of your legacy to the group.

Historical Information

Calendar of Regular Events

Event Evaluations

Budgets & Financial Records

Insurance Policies

VII. Forms

- It is a good idea to include copies of all forms under BOTH the relevant sections of the Operation Manual, above, AND in the comprehensive forms section, here. Where the forms included above will serve as examples of the policies that are followed by the group, the forms here can be used as a resource for copying and distribution. (For example, your group is having your retreat and you need a copy of the liability release form. Simply go to the forms section, remove the form, make a copy and then replace.) Copies of all of these forms may be found at various places on the Student Activities website.

Risk Management Matrix

- See <http://studentactivities.tamu.edu/riskmanagement/matrix>

Incident Report Forms

- See

Event Planning Forms

- <http://studentactivities.tamu.edu/riskmanagement/forms>

Travel Forms

- <http://studentactivities.tamu.edu/riskmanagement/forms>

Financial Forms

- See <http://studentactivities.tamu.edu/sofc/forms>

Waiver Forms
- See <http://studentactivities.tamu.edu/riskmanagement/forms>
Membership Applications

You may wish to add to or modify these sections as necessary to reflect the purpose and activities of your organization. For example, if your organization sponsors the same event every year, you would want to include a section outlining the standard procedures for planning and conducting that event. Remember, you want this document to be a resource for everyone in the organization, so make sure it is useful!

How do I use my Operations Manual?

This may seem obvious, but even the best and most thorough Operations Manual is useless if your members don't know about it. We strongly recommend that your manual be included as a part of your new member training programs and annual officer transition planning. Your manual can also be made more user-friendly by placing it online, so that every member always has access when they need it. To ensure that your manual is always up to date, your organization should designate an officer to be responsible for its development and maintenance. In sponsored organizations, this will be a function of the Risk Management Officer. Finally, remember that by outlining guidelines, procedures, and standards, your organization bears a responsibility to act accordingly. To transform your Operations Manual from a statement of expectations into daily actions, you will need to reinforce it with training, leadership, and accountability.

How can I find information for my Operations Manual?

You can begin by reviewing your organization's constitution and other governing documents for basic standards and procedures. Files that your organization has kept from previous years may also hold valuable information, and your advisor may have maintained records of your organization's history. You may identify that your organization has no standards, procedures, or guidelines in a certain area—if that is the case, resources are available to help you develop that section of your Operations Manual. Many of those resources are available online at the following addresses:

General Information	http://studentactivities.tamu.edu/
Risk Management Information	http://studentactivities.tamu.edu/risk
Texas A&M Student Rules	http://student-rules.tamu.edu/
Financial Guidelines	http://sofc.tamu.edu/

The Department of Student Activities also has sample manuals from a variety of organizations on file for your reference.