EAB Tool:
Procedures Manual Template

EAB Advice:

The Student Affairs Forum highly recommends that BITs develop procedure manuals to guide their work with students of concern. Our research surfaced a variety of approaches from short policy statements (See College of Charleston) to robust resource compendiums (See University of North Texas).

To make manual creation easier, the Forum developed the template below to walk teams through the process covering essential areas such as mission, scope, membership, and referral guidelines.

Template Directions:

1. To use this template, teams should begin by filling in the key terms in brackets (below) to accurately reflect the group's mission, purpose, and role on campus. To automate this process, perform the following steps:

- Select "Find" (located under the "Home" tab of in Word; you may also select this by holding the "Ctrl" button and hitting the "F" button).
- In the window that appears, select the "Replace" tab.
- Enter the first key term below, including the brackets, into the "Find what" field.
- Enter the replacement term (italics, below) into the "Replace with" field.
- Click the "Replace All" button.
- Repeat for all key terms.

If you prefer, you may instead manually replace these key terms throughout the document.

2. After filling in the key terms, locate the clauses throughout the document that are contained within braces—{ }—and select which of these clauses to keep. Remove any clauses within braces that do not apply to your institution.

3. Lastly, locate the terms in sideways carets—< >—that designate core team members, consulting or occasional team members, and senior administrators to whom the team reports. Manually replace the terms in sideways carets with the job titles of the appropriate individuals at your institution.

Key Terms:

[institution] – *The name of your institution.*
[team name] – *The name of the team that responds to students of concern.*
[students/faculty/staff] – *The populations that fall within your team's purview. For example, you may choose "students and staff". (Note: if your team's mission includes more than one population, separate the final term with "and", not "or".)*
[student/faculty member/staff member] – *The populations that fall within your team's purview. For example you may choose "student or staff member". (Note: if your team's mission*

includes more than one population, separate the final term in this series with "or", not "and".)

[department of public safety] – *The name of your department of public safety.*

[department of public safety contact number] – *The contact number for your department of public safety.*

[meeting frequency] – *The frequency of your team's meetings. For example, you may choose "weekly".*

[Response team members] – *If applicable, the small group of individuals that meet to discuss high-priority situations in between meetings. (Note: separate the titles of these individuals with commas.)*

[response team name] – *If applicable, the name of the group of individuals that meet to discuss high-priority situations in between meetings.*

[team website URL] – *The web address of your team's webpage.*

[web form title] – *If applicable, the name of the online referral form that faculty, staff, and students may use to submit concerns.*

[team email address] – *If applicable, the email address that faculty, staff, and students may use to submit concerns.*

[team phone number] – *If applicable, the phone number that faculty, staff, and students may contact to submit concerns about others.*

[response timeframe] – *The maximum amount of time following a referral before a team member contacts a referrer to confirm receipt of the referral and, if necessary, discuss the situation.*

[chair position] – *The job title of the individual serving as the team chair.*

[scribe position] – *The job title of the individual serving as the team record-keeper. (Note: at some institutions, this individual will also serve as the team chair.)*

[reporting frequency] – *The frequency with which the team submits an assessment report to senior administrators.*

[senior administrators] – *The senior administrators to which the team periodically submits an assessment report. (Note: separate the titles of these individuals with commas.)*

Team Members

<core member> – *The core members of your team that attend every team meeting.*

<consulting member> – *The individuals that attend team meetings on an occasional basis to consult on individual cases.*

Procedures Manual:

I. Mission
   a. The mission of the [institution] [team name] is to coordinate the support resources of [institution] to assist [students/faculty/staff] in being successful academically and/or professionally and in promoting their health and well-being.

II. Purpose
   a. The purpose of the [team name] is to serve as a central network focused on prevention and early intervention in community situations involving [students/faculty/staff] who experience extreme distress or engage in harmful or disruptive behaviors. The [team name] will develop strategies, provide consultations to the university community, and help coordinate the response of support resources when concerns arise about the well-being of [students/faculty/staff] or when there is behavior that is potentially harmful to self and/or others or is disruptive or threatening. The [team name] will regularly assess these situations in the university community and will recommend actions in accord with existing university policies.

III. Scope
   a. The [team name] is in place to support all departments and individuals on campus. This policy applies to all [students/faculty/staff] at the institution.

IV. Team Responsibilities
   a. The [team name] is tasked with the following:
      i. Coordinate the institution's response to distressing, disruptive, or potentially harmful [students/faculty/staff] situations.
      ii. Develop specific strategies to manage distressing, disruptive, or potentially harmful behavior by [students/faculty/staff] with regard to safety and rights of others and minimize the disruption to the campus community.
      iii. Make recommendations to university officials on appropriate action regarding distressing [students/faculty/staff] consistent with university policies and procedures.
      iv. Receive, gather and catalog information about concerning situations involving [students/faculty/staff].

V. Emergencies
   a. The [team name] is not intended for emergency situations. In cases of emergency, referrers should contact the [department of public safety] directly at [department of public safety contact number].

VI. Referral Process (Non-Emergencies)
   a. The [team name] cannot effectively support distressed [students/faculty/staff] without referrals from the campus community. For non-emergency situations, the team has established the following channels and process for making a referral. To submit a referral, please do the following:
      i. {Visit [team website URL] and click [web form title]. Provide the requested information. A team member will be in touch within [response timeframe] to confirm receipt of the referral and potentially to discuss the situation further.]
      ii. {Email [team email address] identifying the [student/faculty member/staff member] and describing the situation or the reason for your concern. A team member will be in touch within [response timeframe] to

confirm receipt of the referral and potentially to discuss the situation further.]

iii. {Call [team phone number].}

VII. Membership

a. Core Members

i. The following members will regularly attend [team name] meetings:

1. <core member>

b. Consulting or Occasional Members

i. The following members will attend [team name] meetings when [student/faculty/staff] cases merit their input:

1. <consulting member>

VIII. Meetings

a. Frequency: The [team name] will meet [meeting frequency] to discuss students of concern. Additional meetings may be convened for cases that require immediate action. {[Response team members], constituted as the [response team name], will attend these meetings and will have the primary responsibility for making decisions.}

b. Agenda: The [team name] chair will circulate an agenda [time period] before the [team name] meets. Team members are expected to review the agenda prior to the start of the meeting. Meeting discussions will consist of the following:

i. {New cases}

ii. {Ongoing cases}

iii. {Faculty/staff/student referrals}

iv. {Team member referrals}

IX. Procedures/Guidelines for Case Management

a. Chair Functions

i. The [team name] will be chaired by the [chair position]. Chair functions will include but not be limited to the following:

1. Setting the agenda for meetings.
2. Facilitating meeting discussions and managing meeting time.
3. {Record-keeping.}
4. {Post-meeting follow-up.}

b. Member Responsibilities

i. Members of the [team name] will be expected to perform the following duties:

1. Receiving and sharing relevant information about potentially harmful behavioral situations in the community.
2. Reviewing the meeting agenda prior to the start of the meeting and gathering preexisting information about the [student/faculty member/staff member] in question.
3. Responding to and implementing dispositions and action steps from the [team name] meetings.
4. {Updating the record-keeping database in between meetings as developments occur.}

c. Committee Procedures

i. Discussion at [team name] meetings will abide by the following guidelines:

1. The [team name] will discuss cases for an appropriate length of time to come to an acceptable resolution as determined by the Chair.

            2. The [team name] will work on setting appropriate behavioral boundaries within existing university policies, and examine specific departmental procedures or course of action.
            3. The [team name] will consider specific issues including the assessment of potential violence, evidence of mental illness as the possible cause of the harmful behavior, containment of disruption, examination of environmental causes, and appropriate referral resources.

    d. Criteria for Discussion at the [team name]
        i. Issues involving distressing, disruptive, or potentially harmful behavior from [students/faculty/staff], such as but not limited to:
            1. A [student/faculty member/staff member] who implies or makes a direct threat to harm others.
            2. A [student/faculty member/staff member] who displays a firearm or weapon.
            3. A [student/faculty member/staff member] who physically confronts/attacks another person.
            4. A [student/faculty member/staff member] who stalks or harasses another person.
            5. A [student/faculty member/staff member] who sends threatening emails, letters, and other correspondence to another person.
        ii. Additionally:
            1. A [student/faculty member/staff member] who attempts suicide or who makes serious or repeated threats of harm to self.
            2. A [student/faculty member/staff member] who experiences an accidental or intentional alcohol or drug overdose.
    e. Record-keeping
        i. The [scribe position] will keep a record of all [students/faculty/staff] behavior discussed at the [team name] including name of distressing [students/faculty/staff], the concerning behavior of the [students/faculty/staff], and the recommended disposition of the situation.

X. Assessment of Team Operations
    a. The [team name] will develop relevant assessment criteria to periodically review and evaluate its effectiveness at assisting distressing [students/faculty/staff]. The [team name] will share this information [reporting frequency] with senior administrators, including [senior administrators]. In gathering information relevant for assessment, the [team name] will, among other things:
        i. Add questions to such surveys distributed to students and employees as may be appropriate in an attempt to detect awareness levels of this policy held by students, faculty, and staff.
        ii. Track the following workload and performance indicators:
            1. {Number of referrals}
            2. {Number of cases}
            3. {Number of individual students}
            4. {Number of referrals by academic year or standing}
            5. {Number of referrals by gender}
            6. {Number of referrals by resident status}
            7. {Number of referrals by affiliation, such as Greek, athlete, and honors student}
            8. {Number of referrals by academic major or college}

9. {Number of mandated assessments}
10. {Referrer demographics, including position and department or division}
11. {Number of referrals by channel, such as web form, email, and phone}