

Shenandoah Area Council • Boy Scouts of America



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Event Planning Guide For Volunteers and Professionals

There is an old adage that says: “If you fail to plan, you plan to fail”

An event's success is often dependent on the ability of all involved to communicate clearly and work together. This **Event Planning Guide** is designed to be a working tool to help both Volunteers and Professionals alike. The steps outlined will define specific roles and the tasks necessary to ensure success. The Scouting Professional's as Staff Advisor is to **advise and assist**, especially in areas of scheduling, budgeting, and coordinating Council resources. The Volunteer's role is to **plan, organize, promote, and marshal all other resources necessary** to run the event. In other words, it is the role of the Volunteers to make things happen, and the role of the staff advisor is to assist the Volunteers. This guide will help define the process of both parties. Included are both **requirements (Bold Italic)** as well as suggestions for running a successful event.

This guide is primary used for district and council events, activities, and trainings. Events such as Wood Badge, Summer Camp, and National High Adventure Contingents have additional criteria, guidelines, and policies that are required.

BSA Standards: for all District and Council, events the policies of the Boy Scouts of America are followed. These policies can be found in the following documents:

- Guide to Safe Scouting: www.scouting.org/scoutsourc/HealthandSafety/GSS
- Age Appropriate Activities for Scouts: www.scouting.org/filestore/pdf/34416_insert_web.pdf
 - Cub Scout Outdoor Guidelines:
www.scouting.org/scoutsourc/CubScouts/resources/CubScoutOutdoorProgramGuidelines
 - National BSA Website: <http://www.scouting.org>

A Simple 8-Step Process

Step 1: Goal Setting

For any event to be successful, goals need to be established from the beginning. It is impossible to measure an events success without a clear definition of what you expect the event to produce.

- **Program:** Ask yourself the question: “Why are we doing this event?” The answer will be your program goals. This will help everyone focus on the purpose of the event. Program goals should be limited to three or less; any more make an event too complicated and spread resources too thin. Once you have your program goal(s), you have what you need to plan attendance and financials.
- Program activities should be age appropriate for the event and consist of the following:
 - First Tier Activities – the main activities for the event
 - 1-2 activities centered around the theme and/or appropriate rank advancement/elective requirements
 - 1-2 activities centered around nature and/or outdoor conservation
 - 1 craft activity, meaningful “hands-on” centered around the theme of the event and/or appropriate rank advancement/elective requirements
 - Optional “Outside Expert” vendor display, demonstration or interactive activity.
 - Second Tier Activities (These should NOT be considered main activity options)
 - Shooting Sports Activities
 - Archery, BB gun, Pellet gun, Sling Shot, etc.
 - Climbing Activities
 - Climbing wall, natural face rock rappelling
 - Water Activities
 - Swimming, boating, canoeing, kayaking, paddle board
 - Third Tier Activities (These should be considered OPEN free-time type activities)
 - Fishing
 - Open Games
 - Volleyball, Gaga ball, human foosball, tetherball, horse shoe, corn hole, obstacle course, etc.
 - Other Program Considerations
 - Opening/Closing ceremonies
 - Flag Ceremonies
 - Songs before meal service
 - Vespers
 - Campfire
- **Attendance:** Every event should have an attendance goal and a target audience. **WHO** do you want to attend is just as important as how many you want to attend. Knowing this will also helps to focus your marketing and promotions plan.
- **Financial:** Processing registration forms and collecting money are important services provided by **the Shenandoah Area Council staff**. This allows volunteers to focus on program and not on administration. Each event with expenses will have an income in the form of activity fees. ***The volunteer in charge of the event along with the Staff Advisor must develop a budget worksheet before registration and promotions can begin.***

Step 2: Logistics

Logistics include the date, time and location of the event. Many things must be taken into consideration to ensure success. Advance planning is key. Remember “the early bird catches the worm”.

- **Location:** *The Staff Advisor must approve every activity site, with the exception of Camp Rock Enon, BEFORE any agreement can be made. Once the location is approved, only the Staff Advisor may sign contractual agreements required.* Only a Scouting Professional can enter into an agreement on behalf of the District or Council. When securing a location, it is important to not only speak with the person who makes the decision but also with the person who will be on site during your event. This ensures that everyone understands the conditions of the agreement.
- **Date:** When scheduling an event consult other calendars. In addition to the council calendar, consider school and community calendars, as well as religious and government holidays. Always check with the Staff Advisor before scheduling a BSA event.
- **Time:** Be considerate about how long an event will last including travel time, especially for participants from outlying districts.

Step 3: Backdating

Backdating is a method used by the Boy Scouts of America to plan and organize events. This method takes the action items that need to be accomplished and places them in chronological order against a calendar, providing deadlines for each task to be completed. This process helps to avoid “missed” promotion opportunities so important to an event’s success. An example would be promoting an event at Roundtables. It takes a minimum of 10 days prior to get fliers approved, printed, and into the hands of the District Executives for distribution. Backdating identifies when these tasks need to happen before the actual Roundtable date. A MS Excel Backdating guide can be obtained from your staff advisor.

Step 4: Budget

Every event budget must be self-supporting. In other words, there will be no additional funding from the Council to bailout an over budget event. Income from the event itself must cover all the expenses for that particular event. ***Therefore, the final budget must be approved by the Staff Advisor before any monies can be collected or spent.***

Building the budget statistics begins with listing all the items that will be needed for the event. A cost of these items is then determined using a conservative figure, one that is higher rather than lower. Once all expenses are listed, including operational support (15% district & 20% council), equipment and facility use, a total for expenses is calculated. An attendance figure is then obtained by taking 80% of the attendance from the previous year to determine the event fee. Overall, a budget is a guide. To ensure financial success, it is best to budget high for expenses and low for income. All budgets will include a minimum number of participants registered required, 30%, by the Early Bird deadline in order to proceed with the event.

Income:

1. ***All income must be submitted to the Council Office.*** For events that have “walk-ins” or pay at the door activities money must be turned in to the Staff Advisor who will then submit to the Council office on the next business day. ***Income (cash) collected on site during the event cannot be used to pay for expenses.*** Checks should be made payable to the Shenandoah Area Council, BSA.
2. ***Donations must be pre-approved by your Staff Advisor for before approaching any businesses.*** Many of Shenandoah Area’s companies both large and small already donate thousands annually through other channels. For the good of the Scouting program we want to continue this community “good will” and avoid repeated requests for donations.

Expenses: There are three ways expenses can be paid:

1. **Purchase Order (PO):** A purchase order informs Accounts Payable that an upcoming bill is already approved for payment. This is the preferred method because there is no cash involved. If a company or vendor agrees to bill the Council for the order, use this method. **First:** Obtain a quote for the item from the company or vendor. **Second:** Request a PO number from your Staff Advisor. Please provide a quote with the Company Name, Address, and Quantity of the Items, Cost of Items, and the Total Cost of the order when requesting a PO number. **Third:** The Staff Advisor secures a PO and gives the number to the volunteer placing the order. **Fourth:** Company must reference the PO number on the bill they submit. When Accounts Payable receives this bill, it is paid on the next check run.
 2. **Cash Advance:** A Staff Advisor may request a cash advance for an event to pay for items that require cash. Food is the most common expense that requires a cash advance. The cash advance must be requested in enough time to allow for the check to be cut on the standard check run. All cash advances are made out to the Staff Advisor. As the cash is spent, receipts are retained. Receipts totaling the advance are then submitted to the Council. Make sure each receipt clearly references and event's name and/or account number along with description.
 3. **Reimbursement:** The least preferred way to pay for expenses is by reimbursement. In this case a volunteer or professional pay the expense out of "pocket". ***The expense must be pre-approved by the Staff Advisor in order for reimbursement to be made. Receipts are required for all reimbursements and are due no later than the day of the event.*** Receipts for the expenses are submitted and a check request is made. Checks for reimbursement follow the same schedule as Purchase Orders (see above). ***Any receipt or expenditure not pre-approved will be considered a donation to the event and WILL NOT be reimbursed.***
- **Contingence Fee:** A "Contingence Fee", 5% of the event income, is included in every event's budget to cover unforeseen expenses or to help absorb additional items during the event. This money should not be used to balance the budget or counted on as a failsafe. It is only a way to budget cash reserves for the unexpected.
 - **Council Operations:** Council Operations help cover the cost to operate the council and in providing support for its events and activities. This includes BSA branding and licensing costs, professional and local council staff support, fixed and variable cost such as utilities, technologies, insurance and other misc. cost incurred by the Council Service Center
 - **Refunds:** The official refund policy of the council is: All individual refunds are to be requested in writing, and can be sent by mail, email, or fax. Refund requests made more than one week after an event will NOT be considered. When the request is received in relation to the start of the event, camp or activity there will be a determination as to the amount of the refund. Fees may be applied to another individual attending the same event, camp or activity if arranged prior to the event. Fees cannot be rolled-over to a future event or activity. A \$5 cancellation fee, per person, will be subtracted from ALL refunds to cover processing costs. This General Refund Policy applies to all camps, events and activities of the Shenandoah Area Council, BSA unless otherwise stated. (Example Summer Resident Camp) Refunds requested due to medical reasons and other unforeseen circumstances will be reviewed on an individual basis and may require additional documentation. Refund policies for National and Regional BSA events may differ.

Pro-Rated Refund Schedule:

- 30 days or more – Full Refund, less \$5 cancellation fee.
- 15-29 days – 75% Refund, less \$5 cancellation fee.
- 8-14 days – 50% Refund, less \$5 cancellation fee.
- 7 days – 25% Refund, less \$5 cancellation fee.
- 6 days or less – NO REFUND

Registrations:

- **Early Bird Fee:** The Early Bird Fee is good up to three weeks prior to the event giving a discount off of the fee based on the scale below. This is designed to encourage participants to register early and will cover all of your expenses.
 - **Event cost of \$15 - \$25 gets a \$5 discount**
 - **Event cost of \$26 - \$50 gets a \$10 discount**
 - **Event cost of \$51-\$100 gets a \$15 discount**
- **Regular Fee:** The Regular Fee starts three weeks prior to the event and ends one week prior to the event.
- **Event Registration Close Date:** All Events will close one week prior to the event. **No registration including walk-ins will be accepted after this date.** This is to ensure proper supplies, food, and staffing are in place.

Step 5: Promotions:

In Step 1, you identified who you expect to attend your event. Now it's time to market directly to them.

- Create a flyer. Work with your Staff Advisor to create an event flier that answers the questions who, what, when, where and how much. **Event fliers must be approved by your Staff Advisor and Council Marketing Committee prior to distribution.**
- Submit a flyer to Program Services so they have accurate information to pass on to fellow Scouters.
- Reach your target audience. The most successful marketing plan allows for your target audience to hear about your event at least 5-7 times. Direct mailing, Roundtable promotion, unit visitations, e-mail blast, social media such as Facebook, Twitter, and Instagram, Council and District websites, phone calls, and personal contact are all effective tools to promote your event. **Don't rely on just one of them... use them all!** Personal contact and phone calls are the most effective.

Step 6: Recruit Staff / Committee

Don't do it alone.

- Identify people who can help you. Use the resources of the District Committee, Commissioner Staff, and Unit Volunteers. Working closely with your Staff Advisor may provide access to community leaders who could assist as well.
- Know what kind of help is needed. Typical responsibilities requiring staffing include: Logistics, Program, Promotions, and Food. **ALWAYS staff critical functions with two or more volunteers so each can "backup" the other.** Identifying other volunteers to be in charge of these areas will free you, as chairman, to ensure everything is running smoothly. It also provides you with the ability to jump into an area that may need help.
- **A signed Staff Agreement and current Youth Protection Training certification for each staff member is required.**
- **The Staff Advisor serves as the Treasurer or Finance Chair. The Volunteers run the committees and programs.**

Step 7: The Event

During the event, the chairman and Staff Advisor should not be tied down to a specific task. Give yourself the freedom to walk around and see how all aspects of the event are working. Take notes on things that need to be improved in the future as well as positive things to share at the wrap up meeting. Develop a survey with no more than 8 – 10 questions and provided to all participants. The council utilizes surveymonkey.com in conducting online surveys. Your staff advisor will be able to assist you with this.

Step 8: Wrap Up

After the event, a formal wrap-up meeting should take place with as many people involved in putting on the event as possible. ***The Staff Advisor must be in attendance.***

- At this meeting a 3-ring binder containing all the action items, contacts, committee members, meeting agendas, etc., should be created to pass along to next years chairman of the event.
- The chairman should compare notes with the others and make an after-action report. Appropriate thank yous and volunteer recognition should take place.
- ***The Staff Advisor needs to close out the budget here or as soon as possible.***

Miscellaneous Items

Camp Rock Enon (CRE)

- **CRE Usage Fee:** To cover the increases cost of operating a camp, all events will be charged a **\$6.50 per participant. This fee will help cover utilities, garbage disposal, running of the waste water plant, and routine maintenance.**
- **For CRE Events, staff, are to complete staff training offered three times during the year.**
- Staff that completed the annual Staff Training will receive a staff tee shirt and hat.
- Work with the CRE Facility Manager on menu and the necessary kitchen staff needed.
- For use of equipment there will be a per item fee for the event. See the Facility Manager for fee schedule.

Event Custom Items

**Any items bearing the proprietary phrases or logos of the BSA can only be produced by a BSA licensed vendor.*

Patches:

- ***Event patches must be ordered through your Staff Advisor.***
- Patch designs should be submitted 6 months in advance of an event. You have the option of either designing your own activity/event patch or having the patch company design it for you.
- ***Custom designed event patches must be ordered 6 weeks in advance.*** The cost of patches decreases the larger the quantity ordered. If you plan to have patches for your event, it is suggested you budget \$1.50 per patch for a district design.

Staff Items:

- Volunteer staff should be easily identifiable especially for health and safety concerns. T-Shirts, hats, and other items can be used to identify and recognize volunteer staff. ***Your Staff Advisor must be involved when ordering these items.***

Shooting Sports:

- The Council will provide equipment for events that include B.B. Guns and/or Archery shooting sports. ***This must be arranged through your Staff Advisor. The Shooting Sports Director for the event must provide proof of current certification.***

Waterfront activities:

- If your event is at Camp Rock Enon and you plan on using the waterfront area, with Council will provide the appropriate waterfront materials. ***You must have an aquatics camp school certified director on site to use the camp waterfront.*** Waterfront activities taking place away from Camp Rock Enon may not use the CRE waterfront equipment, and the Safe Swim/Safe Boating requirements will apply.

Climbing Wall & Climbing Equipment:

- Due to the additional expense to operate the climbing program and the climbing wall. There is an additional fee of \$3 per participant when using either the climbing equipment or climbing wall. ***This must be arranged through your Staff Advisor. The Climbing Instructor for the event must provide proof of current certification.***

Customer Service:

- Our “customer” is the Scouts and their families. All volunteer and professional staff should have a customer service attitude when it comes to events and activities. Ease of registration, available and accurate information, simplifying the check in process, as well as courtesy are all things to keep in mind. Any event may have a problem arise. Just like in any other business or trade, do everything possible to make the “customer” happy and satisfied.
- When an issue arises, it is always best to take the customer aside and address the issue in private.
- If the situation becomes too difficult call on the Staff Advisor to help solve the problem.
- Remember, the secret to a happy customer and successful event is to always treat others like you would like to be treated!

A FEW ADDITIONAL THINGS TO CONSIDER:

- Does the activity promotional flyer clearly explain the overall event program activities and generate excitement by your target audience?
- Does the “Activity Guide” provide additional detailed information that the target audience may need in order to decide whether to attend the event? Does it tell them everything they need to know to properly prepare for the event? Does it tell them everything they will need to know, and what to expect, once they get to the event?
- Do the program stations engage the target audience with age appropriate hands on activities that are fun challenging learning opportunities? Will the participants (more importantly their parents and/or leaders) believe they got a “Value” for what they paid to attend the event and make them want to come back again?
- Are there enough activities to keep everyone engaged for the entire day? Do you have backup plans in case one or more planned activities don’t work or need to be cancelled at the last minute?
- What are the capacity limitations for each specific activity station? For example, how many people can shoot, climb or rappel at a time or in an hour? How many hours is the station open during the event? Will everyone be able to participate or complete the activity given capacity issues?
- Is the staff properly trained, prepared and/or capable to run a specific activity station? How many staff helpers does each activity need to run successfully?
- Don’t have your Registration/Check-In staff also assigned to run activities that start right after the opening ceremony. Do you have “Runners” or “Quarter Masters” on your staff to handle those last minute, unforeseen items throughout the event? Do you have staff or volunteers lined up to help with serving during meal service?
- Arriving the night before or morning of the event is planning for failure; As the event chairperson, you should plan to arrive at camp the day prior to the event and allow several hours to set up each activity station, registration, etc. well in advance so that you have time to address any unforeseen issues. It is also a good idea to have some of your key staff or service unit arrive early to help with setup.
 - Leave enough time and assign staff to help clean up and put away the equipment and materials used for each program activity station after program is closed for the day or event.

ONE MORE THING TO DO: After the event is over, and all of the participants have gone home, as the event chairperson, you are not done yet. With the Campmaster on-duty, make sure you inspect all campsites, program areas and facilities used during the activity. Is everything put away, locked up, and all trash collected?

GOOD LUCK, AND MAY ALL OF YOUR EVENTS PUT A SMILE ON A SCOUT’S FACE!

Activity Back Date Check List

Event Name:

Event Date:

	To Do "Action" List	Lead Time (Days)	Comments
<input type="checkbox"/>	Event Date Finalized	Oct. 1	
<input type="checkbox"/>	Activity Director Recruited	300	
<input type="checkbox"/>	Activity Budget Drafted	240	
<input type="checkbox"/>	Activity Location Secured	240	
<input type="checkbox"/>	Activity Director Trained	210	
<input type="checkbox"/>	Program Activities Finalized	180	
<input type="checkbox"/>	NCAP Standards Review	180	
<input type="checkbox"/>	Informational Flyer & Postcard Finalized	120	
<input type="checkbox"/>	Activity Guide Finalized	120	
<input type="checkbox"/>	Online Registration Setup	120	
<input type="checkbox"/>	Patch design finalized	120	
<input type="checkbox"/>	Key Staff/Vendors Recruited	120	
<input type="checkbox"/>	Service Unit Recruited	120	
<input type="checkbox"/>	Materials / Equipment List Submitted	90	
<input type="checkbox"/>	CRE Facilities Usage Form submitted	90	
<input type="checkbox"/>	Registration: Online Reg. Opens	90	
<input type="checkbox"/>	Postcard Mailed	90	
<input type="checkbox"/>	Flyer Emailed	90	
<input type="checkbox"/>	Patch order placed	45	
<input type="checkbox"/>	All Staff/Vendors reconfirmed	45	
<input type="checkbox"/>	Service Unit Reconfirmed	45	
<input type="checkbox"/>	Petty Cash Request	21	
<input type="checkbox"/>	Early Bird Reg. Ends	21	
<input type="checkbox"/>	Registration Review - GO or NO GO	21	
<input type="checkbox"/>	Budget Review/ Revisions - Final Budget	21	
<input type="checkbox"/>	Program supplies/materials ordered	21	
<input type="checkbox"/>	Registration List to Activity Director/Advisor	20	
<input type="checkbox"/>	Menu finalized	7	
<input type="checkbox"/>	Registration Closes	7	
<input type="checkbox"/>	All Staff/Vendors reconfirmed	7	
<input type="checkbox"/>	Service Unit Reconfirmed	7	
<input type="checkbox"/>	Final Registration List to Activity Director/Advisor	5	
<input type="checkbox"/>	Food order placed	5	
<input type="checkbox"/>	Attendee packets printed (including survey form)	5	
<input type="checkbox"/>	Attendee Welcome Email sent	5	
<input type="checkbox"/>	Program Materials & Equipment at camp	3	
<input type="checkbox"/>	Program Activity Stations Set-up	1	
<input type="checkbox"/>	Registration Station Set-up	1	
<input type="checkbox"/>	Dining Hall set up	1	
<input type="checkbox"/>	Staff Training Complete (if necessary)	1	

<input type="checkbox"/>	All receipts due Day of Event	0	
<input type="checkbox"/>	Survey/Thank you letter sent out	-1	
<input type="checkbox"/>	After Action Meeting	-14	
<input type="checkbox"/>	Check/Reimbursement Accountability of Funds	-14	
<input type="checkbox"/>	Budget Review close out	-14	

