

Events Handling and Budget Procedures for all District and Council Events.



**This document is approved by the executive board
of the Tidewater Council.**

Tidewater Council, Boy Scouts of America

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EVENTS AND BUDGET MANUAL

PLANNING AND CONDUCTING A DISTRICT OR COUNCIL EVENT

Good planning will ensure that district and council events provide Scouts with five advantages:

1. Exposure to the greater Scouting program
2. Broadening Scouting experiences beyond the resources of the unit
3. Support for the unit's program
4. A chance to develop planning and organizational skills
5. Advancement opportunities

Choosing an event chairperson

Every event must have an event chairperson approved by the appropriate body.

Commissioner staff members and unit leaders should not be asked to be event chairpersons because their primary responsibilities require all of their time and attention.

Youth may be involved in conducting a district or council event, but adults must be responsible for the event at all times.

Everyone involved is bound by the guidelines in this manual and other Scouting literature such as the *Guide to Safe Scouting*.

Choosing an event committee and staff

The event chairperson and the professional advisor must agree on members of the event committee and staff before anyone is asked to serve. Committee members should represent a broad geographic and demographic spectrum to insure that the entire area is represented. Every attempt should be made to involve new members and others who have not been involved in an event before. The book *Activities and Civic Service* should be referenced when planning the structure of any committee for an event.

The role of the professional

Professional staff members are expected to support the efforts of volunteers in every way practicable, but their role should be primarily as advisors. Responsibility for planning and conducting an event remains with the volunteers. The staff advisor and the chairman should conduct a planning session between themselves first, agree to a work schedule and determine which meetings the professional advisor needs to attend.

A Scout is reverent, no planning sessions are held on days where groups will be excluded because of their faith or are required to pay attention to religious obligations.

The *Sample Work Schedule for District / Council Activities (Attachment G)* and the *Communication Time Line for District / Council Events (Attachment H)* will be useful in coordinating the efforts of volunteers and professionals. Take care to plan meetings and deadlines around routine activities, such as school, religious observances and other Scout events.

The professional advisor for the event is primarily responsible for communicating with the council office the needs of the event. There should never be any need for the event chairperson, his committee or his staff to communicate directly with office staff members. The staff advisor and the chair for the event should work together to ensure that the office is properly utilized.

Registration

A registration deadline must be set for a date at least two weeks prior to an event. To encourage timely registration, a late fee – usually \$2-\$5 or 10 percent of the total fee, whichever is higher – should be assessed after that date.

If there must be a limit on the number of participant who can attend the event, that information should appear on all promotional material for the event, and the Council office should be asked to stop accepting registrations once the maximum number are received.

Council administrative charge

An administrative charge of actual income is assessed at 15 percent to help defray some of the administrative expenses associated with the event. This fee is not charged against district or council dinners.

Insurance

Liability insurance is required for any event to protect volunteers as well as the council. The cost of insurance is designated on the Activity Budget form, though some events with higher risk may require higher fees.

Accident insurance is provided as a routine benefit of membership. Persons not registered with Tidewater Council will not be covered by council insurance.

If an event venue, equipment operator or other contractor requires additional insurance, the Council may issue a certificate of insurance of up to \$1,000,000. This requires the approval of the National Council, and application must be made at least 30 days in advance.

Crisis, emergency or serious injury

In the event of serious injury, emergency or crisis during any Scouting activity, the Council executive should be notified immediately, no matter the time of day. If there is a Scouting professional at the scene, he or she will take charge of notifying the executive.

Only the council executive or his designee is authorized to speak to the media or answer questions from the public.

Promotion

All promotional material for an event must be authorized by the event chairman and the professional advisor. Flyers must be submitted to the Council office for approval before being distributed and must include an appropriate account number and SW number. Approval for promotional material will not be granted until all pertinent questions are answered and a budget for the event is approved.

The *Event Fact Sheet (Attachment F)* will serve as a guide for preparing promotional material.

Articles promoting an event can be submitted by the event chairperson to the professional advisor for publication in the "EK," the Electronic Knapsack published online by Tidewater Council. Documents can be submitted as Microsoft Word files. Graphics and forms can be submitted as separate electronic files. The Council staff may rewrite the documents, proofread them and convert them into a format appropriate for posting to the Council and district Web site.

The best promotion is face-to-face communication. Successful event organizers attend meetings of the units they hope to attract and arrange to make presentations at district roundtable meetings. Contact unit leaders or roundtable commissioners beforehand to secure a place on the agenda.

Printing

All printing associated with an event must be arranged through the Council office. Outside sources of printing can be used only if approved in advance by the staff advisor

The actual cost of printing will be included in the event budget.

The professional advisor for an event should submit a work order form to schedule printing orders. Orders must be placed at least seven days before the materials are needed, or longer in the case of large orders. The Council's office administrator can advise on the lead time required.

Donations of Materials

At the end of the event, a list of any donations received should be listed as long as the dollar value, who the donor was, and the address of the donor so proper credit may be

given. Donations of goods or services, will not be charged a 15 percent administrative fee, but all donations must be cleared through the staff advisor to ensure that we are not asking other donors for additional gifts or gifts in lieu of their normal contributions. Contributions shall be acknowledged in writing and kept on file as is required.

Mailing

Any mass mailing associated with an event must be done through the Council office. Mailing by an outside source will be reimbursed without the advance approval of the event chairperson and professional advisor.

The U.S. Postal Service requires that bulk mailings (200 pieces) be received three weeks before the expected delivery time, so it's important that mailings be prepared early.

If emergency mailings are necessary without the required lead time, the event will be charged for the full cost of preparing the mailing, including employees' time.

The Council's mailing list is confidential and under no circumstances will it be available for use outside the Council Office.

Tidewater Council letterhead stationery and envelopes are official documents and intended for the use of employees only for council business only.. If Council letterhead is required for an event, the professional advisor can arrange for it.

Special orders

All patches, mugs, T-shirts, ribbons, pins, etc. for use in an event should be ordered through the Council office by the professional advisor to ensure that the materials meet the standards of the Boy Scouts of America. Any exceptions for specialty items must be approved in advance by the event chairperson and the advisor.

All events should include a patch design contest well in advance of the date to ensure that the youth have the opportunity to submit a design.

Special orders must be listed in an approved event budget and must be ordered at least 12 weeks in advance. The cost will include a shipping charge and may also include copyright fees. Tidewater Council is obligated to purchase only from licensed vendors when any logo registered to the Boy Scouts of America is used.

Special design orders should be submitted in electronic format (currently JPEG) and must include a complete color scheme.

Final evaluation

After an event is concluded, a final evaluation should be filed at the Council office within 14 days. Use the *Final Activity Report and Budget (Attachment I)* as a guide. This report

will be kept on file for four calendar years and will be available to future event planners so that they may learn from the successes and mistakes of the past.

All required records – bills, expenses, money and budget settlement – are due in the Council office within five business days after the event, unless other arrangements are made.

BUDGETING AND FINANCING AN EVENT

Council regulations require that any event must have an approved budget before money is collected or spent. Council staff is expressly forbidden to accept or release funds or to promote any event in which funds are involved until a budget is approved.

The *Activity Budget form (Attachment A)* must be completed in full and submitted for approval no less than 90 days in advance of the event.

The volunteer chairperson prepares the budget in consultation with the professional advisor and both must sign the document to indicate that they take responsibility for its contents. The scout executive will review the document and, if he finds it complete and satisfactory, he will submit it to the Council Finance Office. Finance Office personnel will inform the professional advisor upon final approval of the budget.

Unforeseen circumstances, such as registration that is unexpectedly low or high, can necessitate changes in an event budget. Such changes should be reported by filing an additional Activity Budget form clearly marked “Revised.”

It is the responsibility of the event chairperson to see that expenses and income for an event are in balance and consistent with the budget submitted to the council finance office.

Event fees

Fees assessed for an event should reflect the value of the event to participants. If the fee is too high, attendance may drop; if it is too low, the program may suffer.

Generally, everyone involved in an event is charged an event fee, including event staff members. Exceptions to this practice should be discussed in advance by the event chairperson and the professional advisor.

If outside volunteers are recruited to handle parking or security or some other phase of the event, a clear understanding should be reached in advance about expectations regarding fees or remuneration.

Refunds of event fees are permitted only under extraordinary circumstances, such as medical incapacity. In every case, the circumstances must be documented fully and the request must be made before finances for the event are reconciled.

An administrative charge of at least 15 percent will be assessed by the Council on all refunds. No refund of \$5 or less will be granted. If an event is canceled by the district or council, then there shall be no administrative charge for the refunds. Units that make alterations to the number attending before the stated deadline shall be entitled to a refund (less any expenses already planned on with their reservations).

Purchasing for an event

All transactions for goods and services must be processed in one of the following ways, listed in order of preference:

1. **Purchase orders** must be used for any transaction with a business that accepts them. The event chairperson or his designee must authorize a purchase request, using a *Purchase Request form (Attachment B)*. The form is submitted to the professional advisor, who submits it to the Council Finance Office, where a purchase order will be issued.
2. **Cash advances** will be issued only after submission of a complete list of goods or services to be purchased, the businesses providing and goods and services and the amounts involved. A *Check Request form (Attachment C)* must be submitted no less than 21 days prior to the event. A cash advance will not exceed 500. A cash advance of more than \$500 can be arranged but are not encouraged due to the large amount of cash involved.

The council issues checks only on the 15th and on the last business day of each month.

All funds and receipts equaling the amount of the cash advance must be submitted within five business days following an event. Use the *Petty Cash / Advance Reconciliation form (attachment D)* for this purpose .

The cost of any item or service that does not appear on the approved budget for the event can be paid only with approval of the event chairperson and the professional advisor, who must confirm that the goods were received or the services were provided. Full documentation in the form of receipts, packing slips and other records, must be submitted to the Council Finance office without delay.

Use of cell phones, telephone calls from home, postage paid out of pocket or any expense not previously agreed to in writing and included in the event budget will not be reimbursed.

Only persons authorized by the Scout executive are permitted to enter into contractual relationships on behalf of the council. The council is not responsible for any agreement made without such authorization.

Any items that are purchased for an event, but not used, should be returned for credit. Any items not returned for credit that are not perishable goods should be returned to the council office. Large quantities of left over edible items should be donated to a needy Scout unit or food pantry if it cannot be put to another council or district need. If the food cannot be given away in that fashion, an announcement will be made and a first come first served policy will apply to left over food items.

Tax exemption

Tidewater Council is a tax-exempt organization.

The professional advisor can supply official tax-exemption letters for use in purchasing event supplies. The council's Federal Tax Identification number can be used only for official council business.

Handling money

Council field receipt books are available from the professional staff, must be used whenever money is collected at an event. Each receipt must state from whom the money was received, the date, the amount and, if payment is by check, the check number. The original goes to the person paying, the yellow and pink copies remain in the book and are for council use.

Under no circumstances should expenses be paid out of funds collected at an event. Anticipated expenses should be determined and a suitable cash advance should be arranged. Volunteers can be reimbursed for valid expenses before the event and do not have to wait until after or until the event itself.

Petty cash

Petty cash of \$250 or less to make change at an event can be obtained through the cash advance method described above. The transaction must be arranged by the event chairperson through the professional advisor and a full accounting of all cash must be made within five business days after the event. Amounts larger than \$250 can be arranged if there is sufficient reason. Petty cash checks are made out to the professional advisor and they are held accountable for the funds.

Accounting for funds received

It's best that funds be turned over to the professional advisor, who is bonded to handle money. The advisor will provide a receipt. In the event that the professional advisor is not available to receive the money, it should be delivered to the Council office no later than the third business day after the event.

For their own protection, youth members should never be asked to take responsibility for funds.

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Activity Budget (Attachment A)

Activity/Camp:

Date of Event:

Activity/Camp Account No:

District/Division:

Activity ID No:

INCOME	PROPOSED BUDGET	ACTUAL INCOME/EXPENSES	DIFFERENCE
Fees Youth @ \$ x =			
Fees Adult @ \$ x =			
Fee Staff @ \$ x =			
Other Income			
TOTAL INCOME			
EXPENSES			
Fees to National			
Food & Commissary			
Transportation			
Sanitation/ Janitorial			
Medical/Health & Safety			
Site/ Facility Rental			
Program			
Postage			
Printing			
Shipping			
Recognition/ Awards Adult			
Recognition/ Awards Youth			
Misc. Expenses			
SUBTOTAL			
Admin. Expenses 15% of income			
SUBTOTAL			
Liability Insurance \$.75 per person			
TOTAL EXPENSES			
DIFFERENCE			

Your Signature on this budget indicates that you have read and understand the Event Handling and Event Procedures Manual and agree to abide by the Guide to Safe Scouting and Youth Protection Policies. Distribution of approved budget: Original to Finance Office, copy to Event Chair, copy to Staff Advisor.

APPROVALS	INITIAL BUDGET	DATE	CLOSE OUT ACTUAL	DATE
Event Chairman				
Staff Advisor				
Staff Leader (if applicable)				
Scout Executive				

Note: Close Out must be done with Event Chairman's copy of receipts and Book Keepers print out of account. The finances are not final until they match.

CHECK REQUEST FORM (Attachment C)

Please Print

Date: _____ Submitted by: _____

Approved by: _____ Date Check Needed by: _____

Amount: _____

Pay to: _____

Address: _____

City, State, Zip: _____

Return Check To: Staff: _____ Mail: _____

Explanation of Event Expense: _____

Finance Office Use: Charge to GL Account # _____

CHECK REQUEST FORM (Attachment C)

Please Print

Date: _____ Submitted by: _____

Approved by: _____ Date Check Needed by: _____

Amount: _____

Pay to: _____

Address: _____

City, State, Zip: _____

Return Check To: Staff: _____ Mail: _____

Explanation of Event Expense : _____

Finance Office Use: Charge to GL Account # _____

CASH ADVANCE RECONCILIATION (Attachment D)

Payable to: _____

Event: _____

Requested by: _____

Today's Date: _____

Date Needed: 15th of the month _____ Last Day of the month _____
(Checks are run only the 15th and the last day of the month)

Date	Vendor	Item Description	Account Number	Amount

Initial Cash Advance Requested \$ _____

Total Receipts \$ _____

Cash on Hand \$ _____

Total receipts & Cash on Hand \$ _____

Leave blank _____

Approved by:
 Event Chairman: _____

Staff Supervisor: _____

Posted to GL _____

CAMP AND ACTIVITY REFUND APPLICATION (ATTACHMENT E)

Refunds are only allowed based on medical situations, very unusual circumstances, and the circumstances must be documented (in most cases it must be through situations that are beyond the control of the participant). **All approved refunds will be assessed a minimum of a 15% administrative charge.** However, the Council reserves the right to charge to the person requesting the refund any fixed costs paid on behalf of that participant. **No refunds will be remitted if the funds are applied for after the event has been closed out, normally, 30 days past the date of the event.** No refunds will be granted when it is determined that the amount is \$5 or less. The individual or parent/guardian must apply for the refund.

Please Print:

Event or Activity Name and Date of: _____

District: _____

Name: _____

Make Check Out To:

Address:

City: _____ State: _____ Zip Code: _____

Phone No: (area code please) _____

Amount Paid: \$ _____

(Office Use: Amount to be refunded _____)

Please note that 15% will be deducted.

Reason for Request: _____

Signature of Requester: _____ Date: _____

Please place refund in the unit account - Unit Type and Number: _____
(The refund will be mailed to the address above-or posted to the unit account.)

For Office use:	Account-Number:
-----------------	-----------------

Event Committee Action:

Request is: Accepted Denied Refund Amount \$ _____

Event Chairman: _____ Date: _____

Council Approval : _____ Date: _____

DEPOSIT RETURN OR OVERPAYMENT APPLICATION (ATTACHMENT E2)

To be used only for the return of a refundable deposit or for the overpayment of an event. Deposits will not be returned when an event or activity states that there is a non-refundable deposit. No funds will be returned if the funds are applied for after the event has been closed out, normally, 30 days past the date of the event. The individual or parent/guardian must apply for the refund.

Please Print:

Event or Activity Name and Date of: _____

District: _____

Name: _____

Make Check Out To: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone No: (area code please) _____

Amount Paid: \$ _____

Amount of refund requested: \$ _____
(attach copy of receipt)

Reason for Request: _____

Signature of Requester: _____ Date: _____

Please place refund in the unit account - Unit Type and Number:
The return will be mailed to the address above-or posted to the unit account.

For Office use:	Account Number:
-----------------	-----------------

Event Committee Action:

Request is: Accepted Denied Refund Amount \$ _____

Event Chairman: _____ Date: _____

Council Approval: _____ Date: _____

Event Fact Sheet

(Attachment F - two sided document)

Date Prepared: _____ Updated: _____ Updated: _____ Updated: _____

Name of the Event: _____

What is the Scouting purpose of this event? _____

What percentage of the youth targeted do you expect to reach? _____

What is the goal for the number of units that are going to attend? _____

Who is invited to participate? Cub Scouts, Boy Scouts, Venturers, Explorers, Sea Scouts, Varsity Scouts, Learning for Life members. (circle only those that you are providing program for).

Date of the Event: _____

Event Start Time: _____

Location of Event: _____

Event End Time: _____

Registration Deadline (Early Bird): _____

Registration Fee (Early Bird): _____

Registration Deadline (Final): _____

Registration Fee (Final): _____

Extra Patch Cost: _____

District/Council: _____

Chairperson: _____

Home: _____ Work: _____ Fax: _____

Cell: _____

E-Mail Address: _____

Professional Advisor: _____

EVENT FACT SHEET ATTACHMENTS

(Attachment F - two sided document)

Participants are expected to bring what in order to participate: _____

Directions to the event: _____

What Scouting Skills or requirements in handbooks can be expected to be taught at this event: _____

Attach or include the following:

Roster of event committee and what job assignment they carry

A copy of the flyer or promotional materials that will be used with this event

A copy of the approved budget

A copy of the time table that is used to plan the event

Written or confirmed in writing emergency plans with local officials

A map of the location of the event (should be included with the promotional materials)

A copy or statement of the goals for this event

SAMPLE WORK SCHEDULE for DISTRICT/COUNCIL ACTIVITIES (Attachment G)

STEP NO.	JOB STEP TO BE DONE	DAYS BEFORE OR AFTER ACTIVITY
1	Secure location. Select chairman. Recruit committee.	-180
2	Meeting of committee to develop program, budget, patch, promo, etc.	-150
3	Prepare attendance promotion announcement for release in 10 days.	-130
4	Develop recognition plan & prepare Knapsack and "E.K." articles.	- 90
5	Water, sanitation, fuel, supply, permits & other facilities arranged.	- 80
6	Arrange for religious observance, if needed.	- 60
7	Plan assignments, recruit personnel, finalize program details, etc.	- 60
8	Prepare and release advance publicity and media announcements.	- 40
9	Arrange traffic control, parking, and police, if needed.	- 30
10	Prepare event signs.	- 30
11	Meeting of committee: Details completed, special guest invitations prepared and sent, registration well underway.	- 30
12	First aid & hospital emergency service arranged.	- 15
13	Facility for Trading Post, PA/sound system, etc. arranged.	- 15
14	Physical properties & HQ area arranged.	- 15
15	Radio/TV/PR spots arranged for release in 8 days.	- 15
16	Final program set.	- 15
17	All special programs planned & responsibilities assigned.	- 15
18	Arrange for delivery of any materials to site.	- 3
19	Event set-up.	- 1
20	Event.	0
21	Prepare reports, thank you's, and follow-up.	1
22	Committee meets for evaluation. Event information collected and 'packaged' to be passed on to next chair person.	7

HOW NOT TO COMMUNICATE TIME LINE for DISTRICT/COUNCIL ACTIVITIES (Attachment H)

STEP NO.	JOB TO BE DONE	DAYS BEFORE OR AFTER ACTIVITY
1.	Committee secures location, selects chairman, recruits committee and begins to plan terrific activity or event.	- 120
2.	Committee continues planning process, and discusses possibility of attendees.	- 90
3.	Flyer/notice/event information is brought to council office for copying and mailing	- 45
4.	Flyer/notice/event information is mailed.	- 40
5.	Flyer/notice/event information is received by everyone NOT living in North Carolina.	- 37
6.	Flyer/notice/event information gets put into Scoutmaster's/Cubmaster's briefcase.	- 36
7.	<u>Option 1</u> : Flyer/notice/event information is read by Scoutmaster/Cubmaster the day AFTER the monthly committee meeting. (NOTE : In this case, do not pass "GO!" Do not collect \$200, and turn in your game piece because YOU JUST LOST!)	- 29
	<u>Option 2</u> : You're in luck! Scoutmaster/Cubmaster actually removes notice from briefcase, reads it, AND takes it to the next committee meeting. (NOTE : In this case, you may continue playing the game.)	
8	Unit leaders decide to participate in event. Event information details will go out at next pack or troop meeting.	- 22
9.	Pack or troop meeting held.	- 15
10.	Leaders begin to call parents who did not attend pack meeting. SPL begins to call patrol leaders who did not attend troop meeting. Patrol leaders begin to call Scouts who did not attend last troop meeting.	- 14
11.	All calls finally completed. Everyone notified	- 7
12.	Event registration deadline	- 7
13.	Flyer/notice/event information finally arrives in North Carolina.	- 7
14.	Activity or event.	0
15.	Flyer/notice/event information arrives in California to unit's registered Scoutmaster/Cubmaster who moved from the area last summer	7
16.	Committee conducts evaluation meeting to analyze low attendance.	14

WHY 120 DAYS IS NOT ENOUGH TIME TO PROVIDE FOR A QUALITY EVENT!

FINAL ACTIVITY REPORT AND BUDGET

(Attachment I - two sided document)

Submit this as your cover sheet for your final report and attached the information as called for on the second page. Complete and submit within two weeks of your event.

Name of the Event: _____

Location: _____

District\Division: _____

Attendance (by number of people and unit):

Youth: _____

Adult: _____

Staff: _____

Total: _____

Number and Type of Units Represented: _____

Weather Conditions: _____

Major Injuries: Yes _____ No _____ If Yes, Submit Incident Report

Strong Points of the Event: _____

Weak Points of the Event: _____

General Assessment of the Event: _____

Name of Course Director/Event Chair: _____

Report Prepared By: _____ Date: _____

Distribution: Rosters to registration; and all materials archived for four years

Signature of Event Chairman: _____ Date: _____

Signature of Event Advisor: _____ Date: _____

Scout Executive's Signature: _____ Date: _____

FINAL ACTIVITY REPORT AND BUDGET CONTINUED (ATTACHMENT I-TWO SIDED DOCUMENT)

Attached or included with this file should be the following:

- Roster of event committee and what job assignment they carry
- A copy of the flyer or promotional materials that will be used with this event
- Copies of the initial approved and final budget
- A copy of the time table that is used to plan the event
- Written or confirmed in writing emergency plans with local officials
- A map of the location of the event (should be included with the promotional materials)
- A copy or statement of the goals for this event

In the close out report that will be saved for future reference (all of the above items) plus the following information:

- An evaluation of the event that will include:

Personnel Location

A statement as to the attainment of Scouting goals

Communications or marketing effectiveness

An actual budget with the computer generation from accounting

A Statement as to any incidents that occurred during the event. Incident reports should be turned into the Scout Executive.

Things you would do different next time

Copies of articles with the date of publication in the "Knapsack" Newspaper

PR articles and news releases provided for this event

Outstanding problems as to the date of the filing of the closing report

Listing of people in attendance by unit and/or position in Scouting

The majority of this information should be turned in within two weeks of the Scouting event through the event chairman to the Scout Executive.

Remember, our Mission is to provide a Quality Scouting Program to youth through Chartered Organizations who select Quality Leaders.

STEPS TO PLANNING A SUCCESSFUL ACTIVITY (Attachment K)

1. What is the Activity? If applicable, what is going to be the theme?
2. Purpose of the Activity: Whose needs does it meet?
3. Goals: Set attendance goals. How many people/units will it serve?
4. Budget: Based on expected attendance, what are the program items and supplies that need to be purchased? What are the expenses? Based on projected attendance, what is the necessary income? How much do we need to charge per person to break even?
5. Set a Time-line: Planning any activity should begin early enough to leave plenty of time for promotion, mailings, adequate planning, and for attendees to put it on their calendar. For example, if you're doing a leader training, lead-time for planning purposes should be sufficient to get the word out to the individual unit leaders. If you're planning an activity for units, more time is needed because units need to include it on their calendar and plan and organize travel, parents, etc.
6. People Needed to Do the Job: How many people (staff) will it take to carry out the activity ? List them by title, example: Publicity & Promotions _____
Logistics _____ Program _____ Awards _____
7. Promotion: How will we advertise, how will we get the word out? The "Knapsack?" Don't forget to check the deadline for submitting information. Newspaper? The "E.K.?" Mailings? Flyers? Roundtable? Commissioner Staff? District Committee Meetings? Program Packets? A combination of? How soon can information go out? Who's in charge? Who's the contact person for the activity? **Don't forget: always include a contact name, phone number, and e-mail address if they have one, on the fiver or in the information packet!** People should not be given the 'generic' "call the council office" answer.
8. Evaluation: After the event is over and before everybody forgets, have an evaluation meeting. It can be held before everyone leaves the event, or soon after the event is over. Discuss what did or did not go exactly as planned? Have someone record the comments of the staff and participants so that:
 - A.) Information can be passed on to the next person in charge;
 - B.) The same mistakes can be avoided;
 - C.) The successful portions of the activity can be repeated.
9. Keep adequate records. Keep copies of handouts, plans for activities, staff names and numbers, attendance, budget, etc. Include a 20-cent folder in the cost of materials so these can be kept for the future. It is difficult to go back a year later and try to reconstruct. It is also not fair to the next volunteer to be recruited for the job and not have anything to work with, even if **you** had nothing to start with. A Scout is helpful...

Events Quiz! (Attachment L)

Your Name: _____

When should an event budget be developed?

Who fills out the budget?

What is the goal of any budget?

If someone needs a refund for an event-how do we give him or her a refund?

In order to get a cash advance a volunteer needs to have what things already done?

How do you order a patch for an event?

Why is important to know when checks are written and what does cash flow have to do with writing a check?

True or false, can you pay expenses out of the cash you receive at an event?

If someone gives you money-you should always give him or her what?

Do all events need a pre-registration deadline? And what is recommended?

What does POSTING YOUR EVENT MEAN?

In order to advertise a price for an event you need to have what on file?

To advertise an event on the freebie rack what document should be filled out completely?

Who should make contact with the office to do the job of running an activity?

What is the cost of mailing 200 letters three weeks in advance of your event?

A bulk mail takes how long for guaranteed delivery?

Under what conditions will we reimburse someone for sales taxes?

What is a certificate of additional insured?

True or False: The "EK" and the "Web Site" are tools that are wasted if you do not provide the information.

When a volunteer signs off on the budget, they are agreeing to what three things?

Is it a good idea to have a "memo of understanding" of who will do what on an event?

The best form of communications is?

What form do you fill out to get a purchase order?

When can a check request be filled out?

SELF ASSESSMENT TOOL
for
DISTRICT AND COUNCIL EVENTS, Page 1
(Attachment M)

- _____ 180 DAYS IN ADVANCE OF EVENT CHAIR IS RECRUITED 5 PTS
150 DAYS IN ADVANCE 4 PTS
120 DAYS IN ADVANCE 3 PTS
90 DAYS IN ADVANCE -3 PTS
60 DAYS IN ADVANCE -4 PTS
30 DAYS IN ADVANCE -5 PTS

- _____ 150 DAYS IN ADVANCE BUDGET IS DRAWN UP 5 PTS
120 DAYS IN ADVANCE 4 PTS
90 DAYS IN ADVANCE 3 PTS
LESS THAN 90 DAYS -3 PTS

- _____ 150 DAYS IN ADVANCE GOALS FOR THE EVENT AND HOW IT WILL HELP A UNIT
WITH THEIR PROGRAM IS DETERMINED AND WRITTEN 5 PTS
120 DAYS 4 PTS
90 DAYS 3 PTS
LESS THAN 90 DAYS -3 PTS
NEVER DONE-5 PTS

- _____ 150 DAYS IN ADVANCE PATCH DESIGN OFF FOR BID 5 PTS
120 DAYS 4 PTS
90 DAYS 3 PTS
LESS THAN 90 DAYS -3 PTS
PATCHES ARRIVE AFTER THE EVENT -5 PTS
TAKE AN ADDITIONAL 5 PTS A WAY IF THE BUDGET AND THE GOALS ARE DONE
AFTER THE PATCH DESIGN

- _____ 120 DAYS IN ADVANCE INFORMATION ARRIVES FOR UNITS TO SET LOCATION
AND DETERMINE THEIR PARTICIPATION 5 PTS
90 DAYS IN ADVANCE 4 PTS
LESS THAN 90 DAYS -5 PTS

- _____ 120 DAYS UNITS ARE CONTACTED BY COMMITTEE TO GAIN PARTICIPATION 5
PTS
90 DAYS 4 PTS
60 DAYS 3 PTS
30 DAYS -3 PTS
NEVER DONE-5 PTS

- _____ CHAIR AND ADVISOR SIT DOWN AND DISCUSS PROCEDURES AND METHODS
BEFORE PROCEEDING WITH ANYTHING ELSE 5 PTS
CHAIR AND ADVISOR DON'T MEET UNTIL COMMITTEE MEETING-5 PTS

SELF ASSESSMENT TOOL
for
DISTRICT AND COUNCIL EVENTS, Page 2
(Attachment M)

_____ 70% OF THE ELIGIBLE UNITS ATTEND AND PARTICIPATE 5 PTS 60% 4 PTS
50% 3 PTS
40% -3 PTS
30% -4 PTS
20% -5 PTS

_____ A COMMITTEE OF 5 PEOPLE FROM 5 DIFFERENT UNITS IS
REPRESENTED ON THE COMMITTEE 5 PTS
A COMMITTEE OF 4, -4PTS
A COMMITTEE OF 3, -3 PTS
A COMMITTEE OF 2, -3 PTS
A COMMITTEE OF 1, -5 PTS

_____ A CLOSE OUT REPORT IS PROVIDED AS REQUIRED WITHIN THE TIME
FRAME 5 PTS
A CLOSE OUT REPORT IS NOT PROVIDED -5PTS

BONUS POINTS

_____ ANNOUNCEMENTS ARE MADE AT ROUNDTABLE WITH A PRINTED AND
APPROVED FLYER AT LEAST 90 DAYS IN ADVANCE OF THE EVENT. 3 PTS
INFORMATION RELATES HEALTH AND SAFETY PROCEDURES,
CONCERNS 3 PTS
ARTICLE ARRIVES IN KNAPSACK BEFORE EVENT 3 PTS
EK IS UTILIZED STARTING AT LEAST 90 DAYS BEFORE 3 PTS
PROFESSIONAL PROVIDES INFORMATION TO OFFICE AT LEAST 120
DAYS IN ADVANCE FOR SUPPORT STAFF USE 3 PTS
_____ LITERATURE SHOWS WHAT ADVANCEMENT REQUIREMENTS CAN BE
EARNED, 3 PTS
AN INFORMATION PACKET IS PROVIDED FOR POSTING ON THE COUNCIL
WEB SITE 3 PTS
AN EVALUATION IS CONDUCTED BY BOTH THE PARTICIPANTS AND THE
COMMITTEE OF THE EVENT 3 PTS

SCORING

65-74 HIGHEST QUALITY, AN EVENT WORTHY OF "BE PREPARED"
55-64 QUALITY EVENT, ROOM FOR IMPROVEMENT
45-54 AVERAGE, NOTHING TO BRAG ABOUT
34-44 BELOW STANDARDS
24-43 WHAT HAPPENED?
0-23 IT SPEAKS FOR ITSELF-THERE WAS A FAILURE IN OVERALL
LEADERSHIP, AND AT MANY LEVELS.