

Greater Niagara Frontier Council, BSA
EVENT PLANNING GUIDELINES AND POLICY

Rev. – 10/2003

For All Districts and Council Level Activities

1.0 PURPOSE

The purpose of this procedure is to provide guidance to individuals at district or council level in the steps to plan and carry out a successful program. Policy requirements are also included and will be printed in **bold** print to call it to the event chairman's attention. Policy may be National or local, but in either case will supercede any guidelines. The guidelines are sufficiently broad to allow a great deal of latitude in the planing of the program and are not intended to be a total cookbook approach. They are meant primarily as a reminder of all items needed to plan and carry out a successful program.

2.0 SCOPE

The scope of this document is for all district and council events that do not require special budget considerations.

3.0 PLANNING

3.1 The event chairman should be selected at least four (4) months prior to the event. Once the chairman of an event has been selected, thought should be given to the selection of a staff or assistants to help in the planning and execution of an event. It should not be thought that it is the chairman's sole function to plan single-handed and then carry out the event. A suggested staffing guide has been appended for guidance. The type and number of staff will, of course, depend on the size and complexity of the event. For small events, one individual may perform more than one job. Also, all jobs need not be considered. Always select the number necessary to make an event successful.

3.2 Within two weeks, the chairman should call a meeting to the staff and determine the theme of the event, where the event is to be held, the number and types of individual events to be held, physical arrangements (to include First Aid, Sanitary facilities, and water supply), scoring and judging, publicity, and the campfire program. Patch design and ribbon selection should be made at this time.

POLICY NOTE: It is at this time that a rough budget must be prepared on the appended form and submitted to the Scout Executive and/or Professional Advisor for review.

3.3 Two and one-half (2-1/2) months prior to the event a second meeting should be

called. Progress should be checked on the physical arrangements, events, scoring, and publicity. A determination should be made by the person performing the scoring as how ties will be broken, if at all. Any problems that have arisen should be brought up and resolved. Ribbon and patch orders should be finalized and the order placed. The final budget should be prepared and forwarded to the Scout Executive and/or Professional Advisor for final approval. Also, a mailing should be prepared describing all details of the planned event and should be sent to all affected units. Staff advisors must approve all mailings prior to being distributed.

- 3.4 One (1) month prior to the event, a third meeting should be called. At this meeting, again, progress should be checked for physical arrangements, events, scoring and publicity. Solutions to previous problems should be reviewed and new problems should be studied and resolved. **POLICY NOTE: Any requests for Certificate of Insurance should be made to the council office for processing at this time.**
- 3.5 One (1) week prior to the event, any loose ends should be tied up, and any help that is needed for the various staff such as physical arrangements, campfire, etc., should be given.
- 3.6 On the first night of the event, a cracker barrel should be scheduled to answer any questions, make sure all instructions are clear and understood by the unit leaders, and all fees should be collected now. Skits for the campfire should be made available by the units at this meeting. Recognition Tickets should be distributed now for collection prior to award of patches and ribbons.
- 3.7 Within ten (10) days of the close of the event, an assessment meeting should be held to review all aspects of the event. The chairperson of the event should prepare a written report noting all suggestions for improvement, those items that were well liked, and recommendations for future events.
- 3.8 **POLICY NOTE: Within thirty (30) days of the close of the event, the chairman's written report and all invoices are due to close out the event from a fiscal aspect.**

4.0 **BUDGET PLANNING (POLICY NOTE)**

- 4.1 **A rough budget, on the attached form, is due to the Scout Executive and/or Professional Advisor three and one half (3-1/2) months prior to the event. The final budget is due two and one half (2-1/2) months prior to the event. No expenditures are to be made without a final budget approved by the Scout Executive and Professional Advisor.**

- 4.1.1 All activities are expected to be self-sustaining. To break even, every expense must be thought through and offsetting income planned. **A 5% contingency should be added to meet unexpected expenses. An 8% administrative fee must also be budgeted.**
- 4.1.2 Chairman should consider every expense possible based on previous activities and differences in location, facilities, number of participants, etc. We have listed on the budget form most of the expenses that might be encountered.
- 4.2 **No purchases in excess of \$25.00 may be made without a purchase order, or by a specific request for check from the council. In all cases, a quotation (in writing) must be obtained from the supplier. Requests for check or for each advance should be made two (2) weeks in advance of need.**
- 4.3 There will always be those occasions when an out-of-pocket expenses must be made. These occasions should be rare. When an out-of-pocket expense does occur, a receipt must be obtained. **No expenses will be honored without a receipt.** These receipts must be turned in to the chairman immediately.
- 4.4 **All expenses must be closed out within thirty (30) days of the end of the event.**
- 4.5 All Monies received at the event must be turned into the council office within 48 hours. **Policy Note: All monies requested through reservations must always be directed to the Council Service Centers.** Money may be collected at an event and should be turned into the staff advisor.
- 4.6 Procedure
 - 4.6.1 Estimate the number of participants and anticipated expense to support that number.
 - 4.6.2 List by line each item in identified checklist. Discuss with staff additional costs that may be unique to this event.
 - 4.6.3 Add all expenses (subtotal).
 - 4.6.4 Add contingency and administrative fees.
 - 4.6.5 Add lines 20-22 for total.
 - 4.6.6 Identify income items that will offset expenses. Items to be considered are food sales, patch and ribbon sales, etc.

4.6.7 By subtracting the income from the expense items, you can now determine the participant's fee by dividing the final expense by the number of participants and rounding up to the nearest half dollar.

4.7 The council professional staff is responsible to determine that all income is being credited to the correct event, and all invoices are properly coded for charge to the event. All closed event budgets are to be forwarded to the Activities Committee for their review. **Boy Scouts of America and council policy requires all surplus revenue and leftover goods are property of the Council and absorbed into the operating fund. Conversely any activities that have deficits will be covered by the general operating fund (expenses paid) as long as the activity guidelines were followed.**

5.0 CLOSE-OUT

5.1 Prior to the completion of the event, an evaluation form should be distributed to the units to be filled and turned in so that the recognition items may be given to them. The purpose of the evaluation form is to provide feedback to the chairman as to what worked, what didn't, and what should be done in the future. This is a very valuable source of information.

5.2 Please help the next event chairman by being as detailed as possible in the closeout report.

STAFFING SUGGESTIONS

Chairman - Has overall responsibility for the planning, budgeting, staff selection, execution, and wrap-up of the event.

Site Selection and Assignment - Has job of locating appropriate site, making the site plan including the location of water supply, sanitation facilities, first aid, off limit areas, and the assignment of unit sites and event sites.

Registration - Has responsibility of making sure that all arriving units are properly registered and all fees are paid.

Events Coordinator - Has responsibility of scheduling events within the confines of the site locations and of securing necessary equipment and/or props to conduct the events.

Scoring and Judging - Has responsibility for determining how scoring for each event is to be performed, and who will perform the judging. At the conclusion of the events, (s)he will see that the scores are properly tallied and that the appropriate awards are made.

Transportation - Has responsibility to coordinate any non-unit transportation requirements.

Food Services - Has the responsibility for the procurement and preparation of food necessary for the event whether for resale or for staff.

Physical Security - Has responsibility for assuring that the area used by the units are maintained as secure, and also that any areas considered off limits because of potential danger or damage be marked and made known to the units. This responsibility must be passed on to the units.

Campfire Program Director - Has responsibility for the building and the extinguishing of the campfire, skits, and other entertainment associated with the campfire. Is also responsible to ensure that the content of the entertainment be appropriate for the audience.

Communication and Publicity - Has responsibility for communicating and publicizing the event in such a manner that all units are fully cognizant of it. Also has the responsibility for seeing that local media coverage is provided.

Sanitation and Water - Has responsibility for determining sanitation and water needs for the event, and for providing them. Thought should be given to the use of portable toilets rather than individually dug latrines. Most units do not prepare and mark latrines properly, and landowners would appreciate the fact of minimal impact on their property by not randomly locating latrines.

Religious Services - Has responsibility of securing the appropriate ministry to conduct Saturday or Sunday services for units.

EXPENSES

1. Recognition Patches, neckerchiefs, memorabilia, certificates, or any item purchased to recognize the individual or unit for participation in the event.
2. Awards Ribbons, cups, certificates, or any other item purchased to indicate specific achievements (First Place, etc.) during the activity.
3. Site Fees Fees incurred for the rental or use of a **site** for an activity. Camp Seph Mack and Camp Anderson do charge a nominal fee per participant. While there are other places to camp for less money it is important to understand the importance of supporting these facilities for future generations.
4. Facilities Fee(s) incurred for the rental or use of a building (temporary or permanent) required by the owner.
5. Outside Personnel Fee Fee(s) incurred because of the required use of non-Scout personnel such as Lifeguards, Security Personnel, Janitorial Services, etc., by the owner.
6. Sanitation Cost incurred as a result of the need for sanitary facilities such as Porta Potties, Porta Johns, trash removal, etc.
7. Food Meals, snacks, cracker barrels required for the activity.
8. Mailings How many and what type.
9. Copying Fees Cost of copying materials, instructions, directions, etc., for the activity.
10. Program Supplies Costs incurred for such items as handouts, overheads, and Materials training aids, props, rope, tape, cardboard, or any other item needed to conduct the activity.
11. Other Items not covered by any of the above.
12. Salaries Some events (ie. Day Camp) may require a paid staff to ensure a quality experience. This line must include appropriate taxes.
13. Administrative Fee Helps pay for "office" support of activity; phone calls and

support, reservation recording, accounting and other
support services