

Three Harbors Council – Boy Scouts of America

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 herein will define each other’s role and outline the tasks necessary to ensure success. The Scouting Professional’s role (serving as District Executive or 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 gather all the resources necessary to run the event. These guidelines should help.

A Simple 8-Step Process

Step 1: Goal Setting

For any event to be successful, goals need to be established. It's impossible to label an event a success if you don't define what success is.

Attendance: Every event should have an attendance goal and a target audience. WHO you want to attend is just as important as how many will attend. This will also help to focus your marketing and promotions plan in getting this good look at both history and potential.

Program: A program goal can be thought of as the answer to the question: "Why are we doing this event?" Program goals help to keep focus on the purpose of the event. Program goals should be limited to three or less, any more than that starts to get too complicated and spreads resources too thin. Once you have your program goal(s), you have something to measure all other tasks against.

Financial: Processing registration forms and collecting money are important services provided by the Three Harbors Council staff. This allows volunteers to focus on program. It is important that each event with expenses also have an income in the form of activity fees. A budget worksheet should be developed by the volunteer in charge and by the District Executive or Staff Advisor before registration and promotions can begin.

Step 2: Logistics

Logistics involves the time, date and location of an event, as well as the resources needed to support that event. The availability of a location is a factor when scheduling the time and date. Sometimes the time and date are not changeable, so a suitable location must be found for that slot. Setting the date and location early will ensure better participation. Please think of ease of access of location for all parts of your District and always keep safety in mind.

Location: *Every activity site (other than camp) must be approved by the District Executive or Staff Advisor BEFORE any agreement can be made. Once the location is approved, the District Executive or Staff Advisor must be the one to sign any contractual agreement that may be required.* Only a Scouting Professional can enter into an agreement on behalf of the 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.

Request to use any Council camp facility must be submitted by the professional to the Program Assistant. For Council event cabin rentals you will need to reserve camp facilities beginning September 1st of the year prior (IE September 1st 2011 for calendar year 2012...) September 1st to October 1st the cabins will be open to District Events. All cabins must be paid in full by October 1st unless other arrangements are made. After October 1st units and other groups will be able to book Council facilities. Districts should plan to reserve cabins at Roundtables and the District Executive should submit cabin permits to the camping department to be assigned.

Date: Before scheduling an event look at other calendars in addition to the Council Calendar. School Calendars, Community Calendars, and Religious Holidays are very important to keep in mind.

Time: Think about how long your event is going to last and what time is best to start. Allowing travel time is important, especially if dealing with participants from outlying districts, as well as time to get home and change.

Special Note on Shooting Sports – if you plan on any shooting sports activities you must contact the council shooting sports committee 4 weeks in advance to arrange for Range safety officers and/or certified instructors. (Rifle, Shotgun, Archery, BB, Tomahawks, etc.)

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, providing a deadline for each to be completed. This process helps to avoid “missed” promotion opportunities so important to an event’s success. Remember, it takes a minimum of 7-10 days in advance of a Roundtable date to get flyers approved, printed, and into the hands of all the District Executives for distribution. Your District Executive or Staff Advisor can provide you with a backdated schedule for your event. Remember that our camp calendars go live on September 1st for the next year – ie 9/1/14 for 2015.

Step 4: Budget

Every event budget must stand alone. In other words, there is no additional funding that comes from the Council to support an event. Income from the event must cover all expenses. Therefore, the final budget must be approved by the District Executive or Staff Advisor before any money can be collected or spent.

Building a budget starts with listing all the items that are needed for that event. A cost of these items is then determined using a conservative figure, one that is high rather than low. Once all expenses are listed, 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.

Income: All income must be submitted directly to the Council Office. For events that have “walk-ins” who pay at the door, the money must be turned in to the District Executive or Staff Advisor who will then issue a field receipt and turn it in 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 Three Harbors Council, BSA. Before you approach a business for a donation, check with your District Executive or Staff Advisor for approval. Many of Southeast Wisconsin’s largest companies already donate thousands annually through other channels. For the good of the program we want to continue this community “good will” and avoid repeated requests for donations for multiple events.

Expenses: There are two ways expenses can be paid:

1. **Purchase Order (PO):** A purchase order is simply a form that is used to inform 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 for the company or vendor. **Second:** Request a PO number from your District Executive or Staff Advisor. Please provide the Company Name, Address, Quantity of the Items, cost of Items, and the Total Cost of the order when requesting a PO number.

Third: The District Executive or Staff Advisor approves the purchase and 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 to the Council.

- 2. Reimbursement:** The least preferred method to pay for expenses is by reimbursement. In this case a volunteer or professional pays for the expense out of their own “pocket”. The expense must be pre-approved by the District Executive or Staff Advisor in order for reimbursement to be made. Original receipts are required for all reimbursements. Receipts for the expenses are submitted and a check request is made.

Contingency Fee: A contingency of 15% is included in every event’s budget to cover the administrative costs associated with that event. Some of these costs are administrative overhead, printing and promotions, professional and camp staff services, accounting, website services, and more. Our camporee camp cost is \$40 plus \$1 per person.

Step 5: Promotions, Promotions, Promotions!

Registration Forms and Flyers: Now it’s time to let everyone know the specifics about your event. All registration forms and flyers **MUST** be approved by the Council Administrative Staff before they can be distributed or placed on the website. Please see the procedure on how to do the registration forms. (Your District Executive can provide this for you.). Please remember to add your email and website information to the flyer. The E-Blast is also a great way to get information out to your district – see your District Executive for a schedule of E-Blasts.

In Step 1, you identified who you expect to attend your event. Now it’s time to market directly to them. Knowing how to reach your target audience requires coming up with a plan. This is one of the most important steps in assuring a successful event and the one most often overlooked. 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, email announcements, District websites, phone calls, and personal contacts are all effective tools to promote your event. Don’t rely on just one of them...use them all!

Step 6: Recruit Staff/Committee

Don’t do it alone. Use the resources of the District Committee, Commissioner Staff, and Unit Volunteers. Working closely with your District Executive or Staff Advisor may provide access to community leaders who could assist as well. Typical responsibilities requiring staffing include: Logistics (IE Parking, facilities, port a johns, equipment needs, etc...), Program, promotions, and food. ALWAYS staff critical functions with two or more volunteers so each can “backup” the other. The District Executive or Staff Advisor serves as the Treasurer or Finance Chair. Identifying other volunteers to be in charge of these areas frees you, as chairman, to ensure everything is running smoothly. It also provides you with the ability to jump into any area that may need help.

Step 7: The Event

During the event, the event chairman and District Executive or 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 went well and things that need to be improved.

Step 8: Wrap Up

After the event, a formal wrap-up meeting should happen with as many committee and staff as possible. At the bare minimum, a meeting with the District Executive or Staff Advisor should take place to compare notes, close out the budget, and make an after-action report. District Executives should make a 3-ring binder containing all the action items, contacts, committee, meeting agendas, etc., to pass along to the next chair. Budgets must be closed no later than 30 days after the event.

Both the event chairman and professional should thank every volunteer who served on the event committee. Special recognition should be done at the event. Thank-you notes are just one way to show your gratitude.

Miscellaneous Items

Event Patches: Event patches should be ordered through your District Executive or Staff Advisor. The District Executive or Staff Advisor will get three quotes (one of which will be from the Scout Shop). The patches should be ordered at least six to eight weeks prior to the event.

Customer Service: All volunteer and professional staff should have a customer service attitude when it comes to events and activities. Making an event easy to register for, having plenty of information available, returning phone calls, and making check-in a simple process, are just a small list of things to keep in mind. Even organized plans have complications arise and when they do you want to make sure you do everything possible to make the “customer” happy and satisfied. When an issue arises with customers it is always best to take them aside to address the issue in private. Work with your District Executive or Staff Advisor when it comes to difficult issues.

Remember, the secret to a successful event is to always treat others like you would like to be treated!

BSA Standards: *For all District and Council events the policies of the Boy Scouts of America must be followed. These policies can be found in the following documents:*

Guide to Safe Scouting:
Age Appropriate Activities for Scouts:
Cub Scout Outdoor Guideline
National BSA Website: Scouting.org
ThreeHarborsScouting.org/camping

Unauthorized and Restricted Activities

The following activities have been declared unauthorized and restricted by the Boy Scouts of America:

1. All-terrain vehicles (ATVs) are banned from program use. The exception is council-approved ATV programs. They are not approved for unit use. ATVs are defined as motorized recreational cycles with three or four large, soft tires, designed for off-road use on a variety of terrains.
2. Boxing, karate, and related martial arts—except judo, aikido, and Tai Chi—are not authorized activities.
3. Chainsaws and mechanical log splitters may be authorized for use only by trained individuals over the age of 18, using proper protective gear in accordance with local laws.
4. Exploration of abandoned mines is an unauthorized activity.
5. Varsity football teams and interscholastic or club football competition and activities are unauthorized activities.
6. Fireworks secured, used, or displayed in conjunction with program and activities is unauthorized except where the fireworks display is conducted under the auspices of a certified or licensed fireworks control expert.
7. The selling of fireworks as a fund-raising or moneymaking activity by any group acting for or on behalf of members, units, or districts may not be authorized by councils.
8. Flying in hang gliders, ultralights, experimental aircraft, or hot-air balloons (nontethered); parachuting; and flying in aircraft as part of a search and rescue mission are unauthorized activities. Tethered hot-air balloon flights are authorized, and a flying plan must be submitted.
9. Motorized go-carts and motorbike activities are unauthorized for Cub Scout and Boy Scout programs. Go-carting conducted at a commercial facility that provides equipment and supervision of cart operation is authorized upon submittal of a completed tour and activity plan. Participating in motorized speed events, including motorcycles, boats, drag racing, demolition derbies, and related events are not authorized activities for any program level.
10. Participation in amateur or professional rodeo events and council or district sponsorship of rodeos are not authorized.
11. Pointing any type of firearm or simulated firearm at any individual is unauthorized. Scout units may plan or participate in paintball, laser tag or similar events where participants shoot at targets that are neither living nor human representations. Units with council approval may participate in formally organized historical reenactment events, where firearms are used and intentionally aimed over the heads of the reenactment participants. The use of paintball guns, laser guns or similar devices may be utilized in target shooting events with council approval and following the Sweet 16 of BSA Safety. Council approval means the approval of the Scout Executive or his designee on a tour permit specifically outlining details of the event. (However, law enforcement departments and agencies using firearms in standard officer/agent training may use their training agenda when accompanied with appropriate safety equipment in the Law Enforcement Exploring program.)
12. Hunting is not an authorized Cub Scout or Boy Scout activity, although hunting safety is part of the program curriculum. (The purpose of this policy is to restrict chartered packs, troops, and teams from conducting hunting trips. However, this policy does not restrict Venturing crews from conducting hunting trips or special adult hunting

expeditions provided that adequate safety procedures are followed and that all participants have obtained necessary permits and/or licenses from either state or federal agencies. While hunter safety education might not be required prior to obtaining a hunting license, successful completion of the respective state voluntary program is required before participating in the activity.)

13. Motorized personal watercraft (PWC), such as Jet-Skis®, are not authorized for use in Scouting aquatics, and their use should not be permitted in or near BSA program areas. The exception is council-approved PWC programs. They are not approved for unit use.
14. Except for (1) law enforcement officers required to carry firearms within their jurisdiction, and (2) circumstances within the scope of the BSA hunting policy statement, firearms should not be in the possession of any person engaged in camping, hiking, backpacking, or any other Scouting activity other than those specifically planned for target shooting under the supervision of a certified firearms instructor. (Among the purposes of this policy is to prohibit adult leaders from bringing firearms on BSA camping and hiking activities or to unit meetings.)
15. Parasailing, or any activity in which a person is carried aloft by a parachute, parasail, kite, or other device towed by a motorboat, including a tube, or by any other means, is unauthorized.
16. All activities related to bungee cord jumping (sometimes called shock cord jumping) are unauthorized.
17. Technical tree-climbing with ropes or harnesses is not authorized as an activity. Water chugging and related activities are not authorized for any program level.

This Guide has been approved by:
Three Harbors Camping, Properties, and Risk Management Committees