

Event Planning Guide

For Volunteers and Council Staff

July, 2020



BOY SCOUTS OF AMERICA
NORTHWEST GEORGIA COUNCIL

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 Staff 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 marshal all the resources necessary to run the event. In other words, it is the role of the Volunteers to make things happen. These guidelines should help. They include both requirements () and suggestions.

It is the vision of the Northwest Georgia Council to provide every youth member a safe, meaningful and fun activity. Conducting an activity in the Boy Scouts of America represents a partnership between a committee of volunteers and the policies and procedures of the Boy Scouts of America. All events, District or Council, are approved by the Council Activities Committee, with final approval of the Northwest Georgia Council Executive Board. Events may not be approved or they may be cancelled if they do not comply with BSA standards.

The total financial health of the Council relies on the financial success of all events and activities, which comprise a part of the council budget. Therefore, each activity must be self-supporting.

Controls regarding cash receipts, income, and expenses are mandated by the Accounting Guide for Non Profits of the Financial Accounting Standards Board (FASB), the Internal Revenue Service for a 501(c)3 organization, the Northwest Georgia Council Executive Board, and by the National Council of the Boy Scouts of America.

Several booklets are available from the Boy Scouts of America to help specialized or specific events. For example, Recognition Meetings, Day Camp, Camporee, and Webelos Woods have their own guidebooks. These manuals serve as a secondary resource to this Activity Planning Guide. Further information is available in the Activities and Civic Service Committee Guide, No. 33082.

A Simple 8-Step Process

Step 1: Goal Setting

For any event to be successful, goals need to be established. It is impossible to label an event successful 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.

Timeline: The NWGA Council has an annual Calendar meeting. Dates for all Council events should be put on the calendar 2 years in advance. District event dates can be added at each calendar meeting one year in advance. This helps everyone plan a successful event and participants can add it to their yearly calendar.

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 thin. Once you have your goal(s), you have something to measure all other tasks against.

Financial: Processing registration forms and collecting money are important services provided by the Northwest Georgia Council staff. This allows volunteers to focus on program and not on administration. 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. Remember, "the early bird catches the worm".

Sometimes your facilities come up short. Not enough bathrooms; no food service; the size of the venue is overly large, etc. That is where logistics comes into play. If you cannot provide a toilet for every 15 campers or 30 people for a day event, or a shower for every 20 people camping, you may need to rent and provide for those facilities. Costs for dumpsters and port-a-lets are built into the budget template. Communications, such as using radios to speed service, falls under this too. Parking and transportation of gear should also be preplanned and heavily supported.

If your event covers a lot of geographical territory, you might need to rent golf carts to bridge the distance in a timely manner. UTVs and golf carts in 2020 may be used by maintenance personnel or to transport disabled or other individuals on camp property when the operator is 18 years of age or older and is trained in the safe operation of the vehicle by taking the ROHVA Safety E-Course at www.rohva.org.

You'll need to deal with trash pick-up and disposal. Proper set up for your event: such as tables and chairs for program and meal areas. Logistics also is tasked with ensuring that any needed items for the event are provided in a timely manner

Finally, one of the most important functions of the logistics team is to ensure the everything is put back into its place and that camp or off-site location is left very clean and to the standards of which were in place before the event

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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 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. If the event will be at CSD, an online reservation for camp should be submitted. Ask your Staff Adviser for a link.

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. Also, don't forget to check with the office before scheduling an event at camp. Some commitments don't always show up on the camp calendar in the initial planning stages.

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.

Registration: Registration is the first opportunity for good impression. If your sign-in goes smoothly, it provides the foundation for the rest of your event.

Currently, all registrations for all events are done through Tentaroo. The staff advisor for your event will ensure the event is set up to your specifications, which are recorded on the event info form. Refer to the Event Resource Webpage on nwgabsa.org for an editable version and an online submission version. Please keep in mind that a simple registration process creates less room for errors and less detail that have to be maintained. For example, if you are adding meal options, advance purchase of extra items, etc. – these are all areas that have to be tracked, executed and reconciled.

Registrations at the door are discouraged as much as possible, but if they do occur you want to be sure payment is made in full at that time.

On event day, it is key that the actual check-in be quick, efficient and painless for the participants. Make sure you have adequate staffing so that a smile is easy to garner from everyone.

Security: The safety of our scouts and scouting families is paramount! All attendees at your event should be issued a color-coded wristband program to ensure that individuals at your program are supposed to be there. Anyone found not wearing a wristband, should be directed to your registration team. Check in procedures should be posted in a key location with expectations of day participants or visitors.

National Camp Standards: The BSA national camp standards are established to: 1. Ensure the health, safety, and well-being of every camper, leader, visitor and staff member will participate in a BSA-accredited camp. 2. Ensure that each camper and leader obtains a quality program consistent with the BSA brand. The Northwest Georgia Council's goal is to ensure that every event we schedule complies with the BSA National Camp Standards

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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. Make sure the schedule includes dates and locations of staff meetings so that the committee staff can plan accordingly. Also, include checkpoint meetings between the Event Director and the staff advisor. 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 assist you with a backdated schedule for your event.

Backdating Schedule

Activity Action Backdating	
Days	Activity Action
-730	Date at Council Calendar meeting
-365	
-210	Recruit Chairperson
-180	Select Location
-150	Recruit Committee
-120	Preliminary Planning Meeting
	Prepare Budget
	Develop Promotional Materials
	Submit Event Info Form with required documentation to professional advisor so the event can be added to the calendar
-90	First Committee Meeting
	Promote in Newsletter & Roundtable
-75	Distribute Media Releases
-60	Second Committee Meeting
	Promote in Newsletter & Roundtable
	Order Custom Items after Purchase Requisition Approvals
-45	Call Units
-30	Promote in Newsletter & Roundtable
	Early Registration Deadline
	Complete material orders
	Third Committee Meeting
-20	2nd Call to Units
-14	Registration Deadline
	Reconfirm Physical Arrangements
	Reconfirm Staff Members
-5	Final Check on Details
0	Activity
	Turn in at door registration to District Executive
7	Return Equipment
	Send Thank You Letters
	Submit Receipts for Cash Advances
	Host Evaluation Meeting with Staff
10	Prepare Close Out Report with District Executive, submit within 10 business days after event

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. Do not plan for 100% attendance of the eligible participants. For example, the district has 1,000 Scouts, and the past five years attendance at the Camporee has been 100 – 125 Scouts. It is recommended that you conservatively plan for the same attendance. It is important to determine expenses before setting a fee. If the expenses are too high, recalculate until a reasonable fee can be established for all participants. Include a fee structure for all participants—the plan for late participants, adult and staff fees. When examining fees, we need to evaluate the cost versus the value. For what the event costs each participant, can that be perceived as a good value? We want to be sure our pricing is not too high so that we don't create an event that is too expensive for the average scout / scouting family. Overall, a budget is a guide. To ensure financial success, it is best to budget high for expenses and low for income.

Based on an estimated attendance, it is now possible to determine expenses. Some expenses are known (cost of a porta toilet, etc.) and some are estimates based on previous years' experience. Your staff adviser has an excellent working knowledge of event expenses and will guide you on these details. It is important to understand that for some items (such as shirts) you may need to order a few extra of each size to accommodate errors in size reporting. On the other hand, we don't want to over order supplies and be left with unnecessary extras.

Refer to the Event Resource Webpage on nwgabsa.org for an editable version of an event budget.

A) Income: All income must be submitted 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 submit same 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 Northwest Georgia Council, BSA. Before you approach a business for a donation, check with your District Executive or Staff Advisor for approval. Many of the 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.

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B) Expenses: There are three 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 from 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 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. Bills must be received four days before the 15th and 30th of each month in order to be processed for payment in that check run.

2. Cash Advance: A District Executive or 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 District Executive or 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 an event's name and/or account number.

3. Reimbursement: The least preferred way 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. Receipts are required for all reimbursements. Receipts for the expenses are submitted and a check request is made. Checks for reimbursement follow the same schedule as Purchase Orders (see above).

Event Contingent: A "Contingent" is included in every event's budget to cover the administrative costs associated with that event. For program and training events a contingent of 5% and a camp usage fee of 15% of all income should be included in the budget under expenses. Some of these costs are obvious such as administrative overhead, printing and promotions, professional and camp staff services, accounting, website services, and more. Included on the Council Event Budget is the cost of insurance the Council carries for general liability coverage and accident and sickness insurance (Line 52 Accident Insurance .75/24hrs per person and line 53 Liability Insurance .60/day per person)

Refunds: It is the policy of the Northwest Georgia Council, that all fees are transferable but not refundable. However, refunds may be requested in writing, two weeks prior to the start of the event for unforeseen circumstances. Failure to participate in an activity does not warrant a refund. The Staff Adviser has the final approval for refunds for an event.

Step 5: Promotions, Promotions, Promotions!

Now it's time to let everyone know the specifics about your event. You will need to design a flyer. Work with your District Executive or Staff Advisor to create an effective event flyer. Remember, all event flyers must be approved by your District Executive or Staff advisor and submitted prior to distribution. This provides the support staff at the council office with the ability to give out information about your event to anyone who calls or stops in with questions. Uniformity in registration boxes and accurate account codes are critical for accurate data entry and correctly credited money to your event's account. Refer to appendix about specific requirements of event flyers.

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. Roundtable promotion, unit visitations, Facebook, e-mail announcements, 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!

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, 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. All district and council events are required to have a health officer who has been approved by the Health and Safety Chairman. The health officer must be qualified under our council's standards and be a registered member of BSA, with both youth protection and BSA Health Lodge Training. The Health Lodge Chairman maintains a list of health officers. 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 an area that may need help.

Step 7: The Event

During the event, the event director 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.

Survey: At the conclusion of the event the staff should distribute a printed survey to the event participants.

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 within 10 days, and make an after-action report. Make a 3-ring binder containing all the action items, contacts, committee, budget, invoices, purchases requisitions, meeting agendas, etc., to pass along to the next chair. 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. Custom designed district event patches can now be ordered but must be done so 12 weeks in advance. You have the option to either design your own activity/event patch or contact the Activities Committee to assist. The cost of patches decreases with the quantity ordered. This can equate to a significant savings. If you plan to have patches for your event, it is suggested you budget \$1.50 per patch for a district design and \$1.25 for council designed. Patch designs should be submitted 3 months in advance of an event.

Staff Items: It's always a good idea to make sure that those who volunteer for staff are easily identifiable on site during the event. T-shirts, hats, different color armband and other items can be used to identify and recognize volunteer staff. When ordering these items, it is important to work with your District Executive or Staff Advisor.

Shooting Sports: The Council will provide the needed equipment for events that include B.B. Guns and/or Archery shooting sports. This equipment can be checked out through your District Executive or Staff Advisor. The Shooting Sports Director for the event must provide proof of current certification.

Receiving Shipments: All orders from catalogs, patches, t-shirts, etc. should include your district and/or activity name in the "In Care of Section" of the shipping address. In most cases the orders should be shipped to the council service center, but in some cases the shipment may need to be sent to camp. Shipments should not be made to volunteer's homes.

**NWGA Council Service Center
1013 North 5th Avenue Suite 1
Rome, GA. 30165**

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Donations: Donations of supplies, food, and cash can be a great benefit to an activity. Many times, they are budget-relieving items, and are greatly appreciated. However, it is important to receipt all donations received, and a copy should be included in the Final Closeout Report. There are guidelines to be followed when donations are received: First, money saved on the budget or on a purchase order that was previously approved does not allow a person to purchase different items or go over the spending limit. In addition, if it is a cash donation, it must be properly receipted and deposited at the council service center. To use this donation, follow the same purchasing procedures as outlined above. Do not spend the cash just because you have it. If the donor contacts the council with a tax relief request, the council will have no record of the gift and the donor will lose out on a much appreciated contribution.

Event Surplus Materials: All materials purchased are the property of Northwest Georgia Council and should be turned in at the close of the event. This includes program supplies, patches, shirts, etc. The only exception to this is perishable food, which can be distributed at the end of the event and is very often given to a charitable organization with the approval of your staff advisor

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 happy customer and successful event is to always treat others like you would like to be treated! Good luck, and may all your events put a smile on a Scout’s face!



Check out our tools on [nwgabsa.org](https://www.nwgabsa.org) at <https://www.nwgabsa.org/ep>