Central Florida 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 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 (Bold Italic)* and suggestions.

"The secret to our Camporee's success? The 'Event Planning Guide' of course. We couldn't have done it without it!"

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 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.

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 Central Florida 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.

Training Events: *It is the policy of the Central Florida Council not to charge for "Basic Training".* This includes training such as: Fast Start, New Leader Essentials, Position Specific, BALOO, Outdoor Leader Skills, District Committee Workshop, or other BSA training provided on the district level. The "trained" patch, training cards, and program training materials needed are provided by the Council. *The exception to the above is for any food or other program expenses not mentioned above.* In these cases, an event fee to cover these expenses should be established with the help of the District Executive or Staff Advisor. "Activity Fees" (see Step 4) do not apply to training.

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".

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.

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. And don't forget to check with the Camp La-No-Che 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.

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 fliers 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.

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, including insurance and activity fees, a total for expenses is calculated. An attendance figure is then obtained by taking 80% of the attendance from the pervious 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 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 Central Florida Council, BSA. *Before you approach a business for a donation, check with your District Executive or Staff Advisor for approval.* Many of Central Florida'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 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 seven 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 reverences 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).

Activity Fee: An "Activity Fee", $1 per person for day events and $3 per person for overnight events, is included in every event's budget to cover the administrative costs associated with that event. Some of these costs are obvious, such as administrative overhead, printing and promotions, professional and camp staff services, accounting, website services and more. But by far, the largest expense included in this fee is the cost of insurance the Council carries for general liability coverage and accident and sickness insurance. Details on the accident and sickness insurance that the council carries can be found on the council website at www.cflscouting.org.

Refunds: This is the official refund policy of the council: *"Refunds will be granted if requested at least 24 hours prior to the beginning of an event, unless stated otherwise on the event application".* For example, if an event begins on Friday evening, then the request must be made before close of business (5:00 PM) on the Thursday preceding by calling 407-889-4403. Direct transfers to another event are not possible.

Step 5: Promotions, Promotions, Promotions!

Now it's time to let everyone know the specifics about your event. You will need to design a flier, or the council can design one for you. Work with your District Executive or Staff Advisor to create an event flier. *Remember, all event fliers must be approved by your District Executive or Staff advisor and submitted to the council office manager 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. You should submit your fliers, even if there is no fee involved, so Program Services has the information. 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 **"How to Create an Event or Training Flyer"** for additional suggestions and tips.

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, 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 serve as the "backup" for 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 an area that may need help.

Step 7: The Event
During the event, the 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. Make a 3-ring binder containing all the action items, contacts, committee, 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 have the council design one for you. Council designs do not have district names on them, this allows for districts who are short to trade with districts who have over-ordered, ensuring that everyone gets a patch at the event. The cost of patches decreases with the quantity ordered. This can equate to a significant savings, another good reason to use the council design. 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, 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. Items bearing the proprietary phrases or logos of the BSA can only be produced by a BSA licensed vendor.

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.

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!*

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: http://www.scouting.org/pubs/gss/toc.html
Age Appropriate Activities for Scouts: http://www.scouting.org/boyscouts/resources/18-260/chart.html
Cub Scout Outdoor Guidelines:
http://www.scouting.org/cubscouts/resources/cub%20scout%20outdoor%20program%20guidelines.aspx
National BSA Website: http://www.scouting.org/