



VENTURING - BSA

# THE EVENT CHAIR'S GUIDE TO PLANNING AN EVENT





# Table of Contents

<b>I. Introduction</b>	3
Event Chair Job Description	3
Resources	3
Selecting Staff	4-5
Sample Key Staff Job Descriptions	5-6
Tips for recruiting	7
Art of Delegation	7-9
Communication	9
When problems happen	10
It's about the boys	10
<b>II. Planning the Event</b>	
Event Diary	11
Planning	11
Sample Timeline	12
Sample Supply List	12
Quartermaster Supplies	13
Location!	14
Promotion and Publicity	14
Registration Forms	15-16
<b>III. Organizing the Event</b>	
Staff Development	17
Selecting Activities	18
Check-in	18-19
Opening	19
Check-out	19
Closing	19
Evaluations	20
Environmental Issues	20
Recognizing Volunteers	21
First Aid	22-25
SHAC Liability Insurance	26
Tour Plan	26
Portable Toilets	27
Ordering Patches	28
<b>IV. Budgets Procedures</b>	
Preparing the Budget	29
Revenue and Field Receipts	29
Expenditures	29-31
Event Close Out Meeting (ECOM)	30
<b>V. Appendix</b>	32

**A SCOUT IS TRUSTWORTHY, LOYAL, HELPFUL, FRIENDLY, COURTEOUS, KIND, OBEDIENT, CHEERFUL, THRIFTY, BRAVE, CLEAN AND REVERENT.** "It is the mission of the Boy Scouts of America to serve others by helping people and, in other ways, to instill values in young make ethical choices during their lifetime to achieving their potential."



Thank you for agreeing to chair a District event. The purpose of this booklet is to provide you with the information you will need to have a successful, quality program and to help you break down the “BIG EVENT” into manageable pieces. You will undoubtedly have many questions concerning the timing of plans, budget and financial considerations, event ideas, etc. But this document will serve as a useful means of answering some of them. It reflects the experiences and on-the-job wisdom from the proverbial “School Of Hard Knocks” graduates of many of those Event Chairs that preceded you. And Thank you, THANK YOU for taking the time to chair an event. The lives you touch will change the world.

## Event Chair Job Description:

The Event Chair’s primary goal is to provide leadership and motivation, enthusiasm and challenge, and friendship and fellowship to every volunteers and participant so they an opportunity to experience Scouting at its best.

Duties include:

- 1) **Selecting, Recruiting and Training Key Staff** (including providing job descriptions/expectations, staff recognition, and following up and see that jobs are being completed)
- 2) **Presiding at Staff meetings**
- 3) **Overseeing the overall event details** (e.g., location, date, budget, timeline, theme, program, patches, t-shirts, registration forms/event fliers, promotion, facilities)
- 4) **Completing the Event Diary and post-event evaluation** (How did we do?, Did we stay within our budget?, What went well?, What went wrong?, What can we do better and how?, Who might make a good chair for next year?)
- 5) **Reporting progress** (to District Activities Chair/Committee, District Committee, District Executive)
- 6) **Writing thank you notes**

You will likely have an event that was done the previous year. You can repeat it or you can change it. All events reflect the creativity and talents of the Chair and volunteers so think of ways that you can improve things. Remember that Scouting changes so we need to adapt our programs accordingly.

The Event Chair is **Responsible to** the District Activities Chair and District Program Chair. Get to know them. It is important that you report progress and/or ~~problems~~ opportunities to them. It is especially critical that you communicate often with the District Activities Chairman whose responsibility it is to see that each District



activity meets the guidelines, policies, and objectives of both the Sam Houston Area Council and the District. Effective and timely communication will keep everyone aware of progress. It is important that you attend District Committee Meetings to facilitate District support. See the Activities Committee Work Plan form in the appendix or online ([www.shac.org/district\\_operations#activities](http://www.shac.org/district_operations#activities)) that is to be submitted to the District Committee during the months leading up to the event and the month following the event. If you cannot attend the District Committee meeting, then submit the Work Plan (Appendix H, I) to the District Activities Chair or Program Chair prior to the meeting.

## Resources:

- District Activities Chair
- District Executive
- District Program Chair
- Previous event chairs
- Council Coordinated meetings at SHAC
- District Committee members
- Sam Houston Area Council Resource Room
- *Guide to Safe Scouting*: [www.scouting.org/pubs/gss](http://www.scouting.org/pubs/gss)
- *Activities and Civic Service Committee Guide* (33082)
- *Camporee Guide* (33571)
- *Cub Scout Day Camp* (33815)
- *Cub Scout Outdoor Program Guidelines* (13-631)
- *District Dinner: Staging Recognition meetings* (33706)
- *Guide to Working with Scouts with Disabilities* (33056C)
- *Health and Safety Guide* (34415)
- *High Adventure Exploring Program Guide* (U34503)
- *Tours and Expeditions* (33737)
- *Webelos Woods: A Scout Outdoor Program Activity* (33838)



## Selecting Staff:

You have the opportunity to bring together the brightest and best volunteers in our District to help plan and run an event to promote the meaning and that is and challenging for the boys, volunteers, parents, and siblings. Key Staff identification and determining their duties will be early consideration. But remember BEFORE you recruit Key Staff you need the approval of the District Activities Chair.

Before recruiting begins you should define all the Key Staff roles and responsibilities. It is important to give each Key Staff member a detailed job description. You can begin by asking the event's previous chair and/or District leaders who they would recommend to be Key Staff members. Identify those volunteers you know have proven track records, but don't forget to latch onto the hidden talents of that "brand new" enthusiastic leader. Watch for potential staff at Roundtable, District events, District training sessions, and unit meetings. A good slogan is "Hire for attitude and Train for skills!" Try to evaluate their skills, interests, experiences, and expectations before making job appointments. Choose a staff structure that matches your style of leadership. Look for people who get things done; are successful in their other volunteer positions, life, and work; can recruit others; know their resources; have influence with others; are well like and respected; and have good character. Take one of the courses on "Generations" offered at University of Scouting or Commissioner's Conference to understand the traits of those who are being recruited.



Refrain from recruiting volunteers over the phone, particularly people you do not know or do not know well. Meet with them face to face. There are many parents out there who would enjoy helping if personally invited. Work with the District Activities Chair to identify and select an assistant chair to learn your position and ideally serve as the event chair for next year's event. Ideally Districts use this approach to train and develop talent. They will recruit an assistant chair the first year with the hopes they will be the event chair the second year (or longer), and an advisor to the Event Chair their last year. The Key Staff will likely be people with more than one year of experience in their area. They in turn will help you recruit their staff. Make sure they know to consult with you before adding someone as part of their staff.

When recruiting, remember to diversify. It is also important that 1/3 of the staff are very experienced staffers, 1/3 are medium experienced staffers, and 1/3 brand new staffers. This ratio ensures the on-going annual success of the event. Make every effort to identify specific jobs and then fill all staff positions. Every job is easier when more people pitch in. This ensures proper staffing ratios and shares the burden with many so that the work is easier. Additionally, back up or reserve staff members help relieve the burden of drop out staff members. Dropouts will happen – have a back up plan for each position, including yours.

Recruit staff from every unit in the District. Staff recruited from different units will promote the event across the district and help identify additional talent. Do not underestimate the power of diversity – everyone has something they can share. Other diversity considerations include having both men and women on staff and different ethnic and religious backgrounds.

At the Cub Scout level remember that the parents of 5<sup>th</sup> grade Webelos will likely be moving on with their sons as they progress to Boy Scouts. Likewise, parents of Tigers will be learning the ropes. Try to identify some enthusiastic parents of Wolf and Bear Scouts as they have two to four years to develop as event staff. Invite Troops to help run district events. Many Scoutmasters will let Boy Scouts earn service hours at Cub Scout events. Make sure to have the Boy Scouts sign-in at registration so you can report to the Scoutmasters how many hours they worked. Also give each Troop volunteer an event patch.



Get people willing involved. If someone volunteers but does not state a desired position, avoid saying you will get back to them. Assign them a task right then and there, even if it is a small task, since you can always go back to say you have another, more important job that better reflects their talents.

This size of your staff will be dependent up two factors: event size and program intensity. The size of the event often dictates a minimum number of volunteers. The size of a job will reflect the number of volunteers to accomplish that job. The second factor, program intensity, deals with both the type of programs offered and the intensity of the willingness and skills of your volunteers to work on the event. Cross-Train your staff on multiple positions.

### Volunteers

By Millbower and Yager



**Who'd like to assist me?**

When recruiting your staff, don't be disappointed if someone turns you down. They may be overworked or already committed to other things and in the long run you'd rather have the rejection than someone who can't fulfill their commitment. If a volunteer says, "no" to a position then have a couple of smaller ways in mind they could help out. Most people are willing to help in some way – after all, their son is involved. Some may be willing to share (e.g., co-chair) a position with another person.

Consider requiring each pack to provide a certain number of volunteers to help the staff on site in order to attend the event. Announce this plan at Program Preview to give units plenty of time to prepare.

### Tips for Recruiting:

- Be selective
- Make a personal visit – take time to talk and get to know them
- Check references
- Emphasize selecting rather than recruiting
- Tell it like it is – explain responsibilities, time involved, resources, and why you selected him/her
- Go over all the "gotchas," deadlines and critical needs.
- Explain the value of leadership – it's worthwhile and satisfying and an opportunity to help boys grow
- Nurture your leaders (start them off slow, maybe working on a committee or event team)
- Allow some time – Give your prospect a few days to think about the decision
- Persevere – don't pressure and permit the prospect to say "no." A leader who joins under pressure may not be the right person.
- Once you have recruited leaders, support them, help them get started, and provide continued assistance, encouragement and training.
- Make your leaders feel special, valuable and valued
- Let them know you want them to be successful

"Selecting Quality Leaders" for Boy Scouts and Venturing: <http://scouting.org/filestore/pdf/18-981.pdf>

"Selecting Cub Scout Leadership" for Cubs Scouts: <http://scouting.org/filestore/pdf/13-500.pdf>



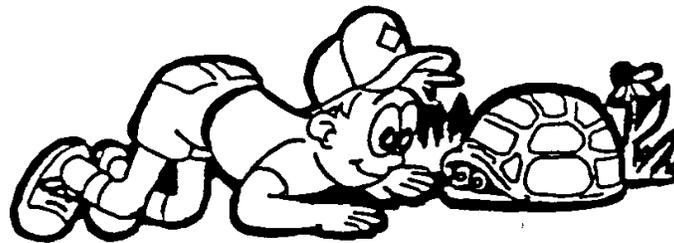
### Job Descriptions:

There are more duties than titles and there are plenty of jobs to go around. You must determine how the responsibility is to be divided. Decide what tasks need to be accomplished and make sure every detail is clearly understood. Be mindful of those who guard their turf. Here are some examples of Key Staff positions and sample job descriptions:

Sample Key Staff	Sample Job Descriptions
Event Chair	organizes overall event details; reserves location (requests liability insurance from SHAC if required by event site); recruits key staff; gives Key Staff job descriptions; checks on staff frequently to see that agreed upon assignments are being carried out; approves event volunteers recruited by the Key Staff; schedules and chairs staff meetings; selects a theme; submits the proposed & final budget to the district Activities Chair (keeps detailed notes of all expenditures); an assistant chair (with the approval of the District Activity Chair) to “groom” to be your successor; designs a patch; finalizes the registration form; notifies the district health and safety chair about the date of the event; attends District Committee Meetings (or sends a Work Plan report to the District Activities Chair) for the months leading up to and the month after the event to update the committee and review event needs; promotes the event; writes thank you notes; provides key staff recognition; keeps detailed notes and updates the Event Diary to give to the District Activities Chair; holds an Event Close Out Meeting (ECOM) with the DE 2 weeks after the events; ensures safety and that all SHAC and BSA policies are followed
Assistant Director	works closely with the Event Chair; assists the chair with all tasks; promotes the event; ensures safety and BSA policies
Program Director	plans and schedules program activities for the event; recruits volunteers/units (also district commissioners & district committee members) to help run events; knows the Scout advancement program; frequently checks on volunteers to see that agreed upon assignments are being carried out; helps to gather supplies; ensures that all program activities have all needed supplies; works with Facilities Director on the location of each activity; promotes the event; ensures safety and BSA policy.
Business Manager	(required for Day Camp) purchases supplies; requests bids and supplies; keeps records of expenses; promotes the event; ensures BSA policy; works very closely with the District Executive
Registration	accepts registration forms (pre-registration, during Roundtable, at the event); keeps Key Staff notified of registration numbers; recruits a staff of enthusiastic volunteers to check-in/check-out Scouts; sorts & passes out t-shirts and patches; develops registration forms with the Event Chair; passes out and collects evaluation forms; provides a lost and found box; keeps a sign-in sheet for volunteers and visitors; ensures that each volunteer gets an event patch; helps the Event Chair keep documentation for the Event Diary; submits all monies collected to the District Executive the day of the event; provides badges/name tags for Key Staff; ensures that all attendees have a medical form (may need to be kept at registration or health & safety during the event); provides District Executive with a list of all Scouters (& unit number) who attended the event (so registration in BSA can be verified); provides District Commissioner with a list of units that attended the event; promotes the event; ensures safety and BSA policy. For Day Camp, compiles SHAC’s Camping report and provides a copy to the district camping chair and Day Camp chair
Publicity	distributes event fliers/registration forms; promotes the event at Roundtable, Program Preview, trainings, district events, District Committee meetings, District Commissioner meetings, units meetings, and websites; works with the district Public Relations Chair to involve local news agencies to cover the event; submits an article to the District Executive for the district website at least three months in advance of the event date
Facilities	meets with event site personnel regarding the location of event and site rules; recruits volunteers to help set up and clean up and help during the event; organizes security; organizes parking; hauls equipment; makes and puts up signs for directions and activities; arranges for portable toilet facilities; sets up tents (e.g., registration); keeps ice & water in water coolers; picks up trash; promotes the event; and ensures safety and policy of BSA
Awards	develops recognition awards for the event; secures door prizes; helps make staff recognition; orders participation ribbons; promotes the event
Photographer	takes pictures/videos of the event and sends them to the district webmaster and District Dinner Chair and District Public Relations chair; makes sure that a Photo Release is on file with registration if pictures are going to be placed on the SHAC website



<p><b>Parking and Traffic Control/Security</b></p>	<p>ensures safety; recruits volunteers to help with parking &amp; traffic control; ensures that adequate parking is provided for staff and participants; develops a system for moving cars into and leaving the parking area; makes signs or cone off “no parking” areas; provides instructions for unloading and reloading vehicles with camp equipment; secures parking vests/flashlights for parking staff; promotes the event; insures policy of BSA</p>
<p><b>Scoremaster</b></p>	<p>collects score forms; calculates scores; determines winners; writes ribbons; provides emcee with a list of winners; promotes the event</p>
<p><b>Chaplain</b></p>	<p>conducts a nondenominational worship service on Sunday morning; promotes the event</p>
<p><b>Campfire Program</b></p>	<p>plans campfire program; emcees the campfire; signs up dens/patrols for skits; plays up beat music while waiting for campfire/during campfire; conducts ceremonies (e.g., flag retirement, flag folding); builds fire; brings sound/video equipment; promotes the event; ensures safety and policy of BSA</p>
<p><b>Health and Safety</b></p>	<p>The District Health and Safety officer should be notified of every district event. It is the District Health and Safety officer’s responsibility to assign a trained member of the Health and Safety team to attend every event. The Health and Safety team is responsible for setting up an a well-equipped tent or shelter for first aid; providing all necessary first aid equipment; recording all persons treated in the First Aid Log Book; displaying a large red cross flag for identification; obtaining fire permits (if required) and ensuring that fire safety is maintained; checking the water supply; surveying toilet facilities and arranging for temporary latrines if necessary; ensuring that toilet paper and wash water are at latrines; having a vehicle available for emergencies; and ensuring that safety is maintained.</p>



**Art of Delegation:**

Delegation is one of the most important and difficult of skills that you need to acquire. You can accomplish only so much in one day. A great way you can achieve more is through delegation – dividing your load and sharing your responsibilities with others. Delegation does not mean “Dumping!” Delegation, a critical management skill, enables you to extend your knowledge and energy and time through the efforts of others and is important because once a person’s job grows beyond his/her ability the success of what is done is at risk. Effective delegation will not only give you more time to work on your important opportunities, but will also help volunteers learn new skills. No successful organization survives without it. Even though others may have a different approach or standards, it’s not all down to you! Give someone else a chance to learn or fail. You are much more likely to recruit a replacement if volunteers don’t see you doing “everything.” Don’t be irreplaceable. Remember, someone that is irreplaceable cannot be replaced. Remember if things go wrong, it’s ultimately your fault! Assess the risk of failure BEFORE you decide to delegate a task, and manage any risk appropriately. The only person you can blame is you, for not effectively delegating the task at the beginning. And you never know, they might even do it better than you! Hand off your expertise.

**Tips for Successful Delegation**

- **Determine what can be delegated...** Be willing to delegate. Don't do an activity that someone else would be willing to do for you if you would just ask them. Delegate as much as possible to develop your staff to help train them to be as good as you are now. Remember, you are not the only one that can accomplish an end result. If you can't define the task to be delegated, it isn't ready for delegation. Good tasks to delegate are Specific, measurable, achievable, realistic, and time bound. Vague tasks are



impossible to complete or result in such a mess you've squandered more time than you could potentially have saved. Trust others to be capable of achieving it. Delegate tasks in which you have experience and are the easiest for you to explain to others. Tasks in which your staff have more experience must be delegated to them. This does not mean that you relinquish responsibility because they are expert, but it does mean that the default decision should be theirs. You should ensure that they spend some time in explaining these decisions to you so that you learn their criteria.

- **Be specific...** It's easy to give someone an assignment (e.g., facilities chair) only to find out later that what they understood this to mean was very different from what you intended. Provide written job requirements and timeline so all Key Staff know their responsibilities. Make your priorities clear. Inform your Key staff what decisions and jobs you are delegating and to whom. As an event chair, you have high standards. When you delegate a job, it does not have to be done as well as you could do it (given time), but only as well as necessary: never judge the outcome by what you expect you would do (it is difficult to be objective about that), but rather by fitness for purpose. When you delegate a task, agree then upon the criteria and standards by which the outcome will be judged.
- **...but don't micromanage.** Clearly define what outcome is needed, then let individuals use some creative thinking of their own as to how to get to that outcome. Leaving the person room to make some independent decisions lets them choose a style of doing things that suits them best. Keep your mind open to new ideas and ways of doing things. There just might be a better way than the way something has previously been done. It makes them feel respected and trusted and part of the team. It builds a greater sense of pride and ownership in the project, and it gives them a chance to develop their skills and confidence. A person will be more excited about doing a project when they came up with the idea of how to do it.
- **Agree on deadlines.** Make sure volunteers understand when their part of the task needs to be done, why the deadlines are important, and how this fits in with the larger timeline for the event.
- **Follow up.** Check back with the person you've delegated to, to find out how it's going, particularly in the early stages of planning. You will soon know if these delegates are in need of more or less guidance. Agree on a monitoring procedure that will keep you informed as to the progress because you are ultimately still responsible for it and need to know that it is progressing, as it should. If you are constantly interfering, you cannot expect good performance but if you do not devise some means of checking on what is done, you may soon find out that you have a catastrophe. Ask if any questions have come up since you last talked. Make sure they have what they need to do the job, and that they're getting the necessary assistance and cooperation from others. Sometimes people are reluctant to admit they didn't understand something, or that they're having trouble. Asking gives them an opening and permission to say so. It's also a way of finding out if someone simply isn't doing the job, before it's too late. Good communication will assure ongoing success.
- **Match assignments with people's skills...** Find out the talents and interests of your volunteers and you will be able to delegate more intelligently and effectively. Some people write well, but *hate* to talk on the phone. Some people can schmooze anything out of anybody, while others would rather do *anything*





besides ask for donations. Find out what people are good at, and what they like to do, and make the most of it. Never underestimate a person's potential. Delegate slightly more than you think the person is capable of handling. Expect them to succeed, and you will be pleasantly surprised more frequently than not.

- **...but don't let people get typecast against their will.** People with particular skills (e.g., registration, awards, crafts) often get stuck with the same jobs over and over, because they do them so well. If they like it that way, that may be fine (although you might want to encourage them to stretch a bit and do something unfamiliar once in a while). But they may be more than ready for a change--and someone else may be just waiting for a chance to do "their" job.
- **Make sure assignments get handed out fairly and realistically.** Most groups have at least one workhorse who tends to take on too much--sometimes to the point of exhaustion and burnout. Another problem is the person who gets carried away with the enthusiasm of a moment and volunteers for things, then finds her/himself unable to follow through. Encourage people to take a realistic look at their workload and abilities, and to take on the jobs they can reasonably handle. Many volunteers wear many hats across the district and their units.
- **Give accurate and honest feedback and reflect.** Give praise. People want to know how they're doing, and they deserve your honest opinion. Praise effort and good work, but also let them know where they might have done better. Encourage risk-taking and growth by treating mistakes and less-than-successful efforts as a chance to learn and do better next time. Effective delegation is about sharing workload, with the added bonus of developing skills and responsibility in others. Maximize the learning experience by taking time for shared reflection of the task once it's completed – what worked, what didn't work and what would you do differently next time?

*References: Tips for Successful Delegation: [www.casagordita.com/delegation.htm](http://www.casagordita.com/delegation.htm)*

*Delegation: [www.coaching-businesses-to-success.com/delegation.html](http://www.coaching-businesses-to-success.com/delegation.html)*

*The Art of Delegation:*

*[www.see.ed.ac.uk/~gerard/Management/art5.html](http://www.see.ed.ac.uk/~gerard/Management/art5.html)?http://oldeee.see.ed.ac.uk/~gerard/Management/art5.html*

*Delegation Tips: [www.liraz.com/tdelegat.htm](http://www.liraz.com/tdelegat.htm)*

***Adjust as you need too. Have Absolute, Rigid, Flexibility.***

## Communication

Communication is vital to the success of any event. As the Chair you must meet with your staff. Determining what you need to communicate will determine how often and which staff members need to meet. Often times a full event staff of a large event needs to meet only once or twice, while a smaller sub-group of that staff can and should meet separately for a more in-depth coordination and discussion of the details that need to be hammered out. Timelines also determine staff meetings. Set up an e-mail group for your Key Staff and a separate one for larger or other groups. Be sure to send out a test message to verify all e-mail addresses are correct. Get the cellular phone numbers of your Key Staff so they can be contacted while away from home or office. Usually frequent communication is better than infrequent. When important deadlines are approaching the whole staff might need to meet to make decisions. Don't assume people know what's going on or that they understand what you said. Provide as much information as writing as possible. Give all Key Staff a copy of the Event Diary. Be clear. Get feedback. Talk with people face-to-face. LISTEN!



## When problems happen

An ounce of prevention is worth a pound of cure! Sometimes it's better to be Proactive rather than reactive. The best way to deal with a problem is to avoid having the problem or at least having identified the likely problem before it happens. Proactive actions are usually seen in a positive light. Problems happen despite our best plan so there will times when you need to be Reactive. With so many people/personalities in a District problems and conflicts are unavoidable – so expect them, and accept them. During the event, realize that what happens at the staff levels are typically not seen by the participants (e.g., the participants may not realize that the staff had to leave camp to buy supplies that were not purchased ahead of time; or that a staff member had to take over for another staff member at the last second).

Helpful hints for handling conflicts include:

- Listen and Empathize
- Be sensitive, the problem may not be with you or Scouting (there may be issues at home)
- The problem/issue/concern may be valid. Try to focus on the facts and NOT the emotions. Be big enough to admit when you're wrong- it may be simply a misunderstanding or bad communication. Remember you're only human – we ALL make mistakes. “I'm sorry” goes along way. Ask if they can help solve the problem.
- Be responsive/take responsibility. Don't let problems remain unattended. They rarely just go away and frequently get worse. People want to feel as if they've been heard and understood. If something's wrong – FIX IT! If you say you're going to do something, DO IT – when you say you're going to do it. Learn from mistakes – many of our greatest advancements are a result of correcting mistakes!
- Don't hold a grudge. Let things go. Refocus – It's about the boys! You may have to agree to disagree. Not every problem is resolvable. Not every “challenging” adult can be turned around.
- Use other resources (e.g., Activities Chairs, previous event chairs, District Executive, Vice Chairs, District Committee members, District Commissioners).

## It's About the Boys!!!!

If you're in Scouting for any other reason, you're in it for the wrong reason!!! Always keep coming back to “Why am I here?” The BOYS! This attitude will help make issues with adults not look too big or seem too important. Ask yourself – “Why am I a Volunteer?” Constantly remind people why you're there – the BOYS.



Remember that you have the rare ability - and responsibility – to make a positive difference in a young boys life. If you do not then some one or some thing WILL and we pray it is not a negative influence. Scouting offers wholesome and proven methods for enabling boys to become productive men. As a Scouter you are playing a key part of the solution to our future. An American Indian saying states that there are many paths in life. Some are good and some are bad. One is best. You can choose to go down any path. Scouting helps you and the lives you touch choose the best path.



## Event Diary:

Make an Event Diary to pass along to your successor (electronic and hard copy). It's the tiny details that are most important!!!! Include:



- *staff list with name, phone number, and event job descriptions*
- *staff meeting agendas & minutes*
- *budget (proposed and final budget)*
- *copies of fliers & form (e.g., registration form, map, handouts)*
- *one complete check-in packet including announcements, schedule, name tags, etc.*
- *program/activity descriptions*
- *attendance reports*
- *planning/staff meeting notes*
- *list of what to bring to the event and where to find the supplies*
- *detailed timeline*
- *information on how to make site reservations*
- *notes or suggestions for next year's event including things that you found out "the hard way" (if it happened to you it will happen again!)*
- *evaluations from both staff and participants*

## Planning

The District Committee may have determined an event date for you or you may be given the option of choosing your own date, but whatever the situation you will have a limited amount of time to work with. The key is to plan carefully and well in advance. Some events may take as long as 2 years to plan. Don't put it off. Strive for quality. If you cannot give an event the time it needs, don't do it. Save it for another time. You cannot make it with an idea alone, no matter how great it is. Work out the event or program in detail, then put everything down on paper and review it carefully. Sometimes Chairs don't realize the entirety of the work required in planning and executing complex or large events and find themselves shorthanded and in a frazzle as the day arrives. Sometimes the best plans will go awry. Hurricanes happen. Locations get cancelled. It can happen and it's better to face the facts in the beginning. Always be flexible.



First find out if there are Event Diaries from past events. If not then please make sure to retain your records and document them in an Event Diary for your successor(s). Events are easier to plan if you know what happened in the past. Then take out your calendar and start at the event date. Work backwards from that date and try to include all those details you will need to complete. Also remember that some of these details will be time sensitive (e.g., submitting a location reservation, ordering patches and t-shirts, turning in a budget for approval, ordering supplies, ordering port-o-cans). They must be completed within a certain time period. Identify all other events that are scheduled (Council, District, Unit, schools,

local sports, holidays, etc) and keep in mind that volunteers and resources may be scarce during those times.

Proper Prior Planning Prevents Pitifully Poor Performances. Always have Plan B (and C, D, E, F and more!!).



**Sample Timeline:**

Feb	District Committee sets the date of the event in cooperation with the District Activities Chair
May	Promote at District Program Preview
Aug	District Activities Chair in cooperation with the District Executive submits budget to Council
-9 months	Reserve event location; Recruit Key Staff
-8 months	Make Key Staff assignments and review job descriptions, review timeline, start developing theme/patch design/t-shirt design/registration forms/program ideas
-5 months	Staff meetings scheduled
-4 months	Event promoted monthly at Roundtable, District events and trainings, District website and social media platforms; finalize theme; plan program; recruit volunteers and units to help run activities; request health and safety officer; finalize registration form
-3 months	Submit Quartermaster list to District or Division Quartermaster; sketch patch/tshirt design; submit request for bid for t-shirts/patches/awards/supplies; order supplies and patches; attend District Committee meeting; promote
-2 months	Arrange facilities (reconfirm location/physical arrangements, water, sanitation, liability insurance if needed for site); hold staff meeting: finalize schedule, map, announcements, handouts, program, volunteer assignments/needs; Secure supplies/donations for event; order trophies/awards/staff recognition/ribbons/t-shirts/ port-a-potties; attend District Committee meeting; promote
-1 month	Hold volunteer meeting; check on Key staff to see that agreed upon assignments are being carried out; secure recognitions/last minute supplies; attend District Committee meeting or provide report to Activities Chair; promote; collect pre-registrations
-3 weeks	Secure fire permits; meet with the Health & Safety officer, Program Director and Facilities director at the event site to make a map and inspect for safety
-2 weeks	Turn in all requests for photocopying into the District Executive (e.g., handouts, maps, schedules, evaluations)
-1 week	Pick up patches/t-shirts/awards/supplies; remind key vendors and event location personnel about event; treat outdoor areas for fire ants; mow
- 1 day	pick up keys; charge walkie talkies; set up temporary barriers/fencing
0	Pick up ice, put signs on emergency vehicles, walk event site to check for safety hazards, clean restrooms, serve coffee & donuts for set up/registration team, pass out staff i.d. badges; Set up: registration & health & safety canopies, traffic signs, check-in signs, no parking signs, first aid flag, trash cans, recycling center, program events/signs, flag poles, flagging, water coolers & ice, audio systems, tables, chairs, smoking area signs, lost & found box
1 week	Hold “after action” meeting with Key Staff to reflect, review evaluations and write up suggestions for next year; update the Event Diary; take lost and found box to Roundtable; return district supplies;
2 weeks	Hold Event Close Out Meeting (ECOM) with District Executive and Activities Chair; Submit all receipts to District Executive; submit the following to the Activities Chair: Completed Event Diary, First Aid log, evaluations from participants & staff, extra patches, extra supplies; send out thank you notes to all staff, volunteers, and donators.
1 month	Provide a report to the District Committee on the success of the event and recommendations for next year; display pictures of the event at Roundtable or on the district website; send pictures and a write up to local papers; hand off your expertise

Area	Sample Supply List
Archery	arm guards, arrows, backstops, barricade tape, bow strings, bows, quivers, range fencing, range signs, red flags & flag pole, scoring book, stakes, string, table, tarp
BB	barricade tape, BB guns, canopy, magnets (to keep BB’s from rolling around), mats, range signs, red flags & flag pole, safety glasses, targets, tarps
Crafts	baby wipes, baggies, clothes pins (to hang up craft projects), craft material, crayons, glue, glue sticks, hammers, hole punch, hot glue guns, markers, paint, paper bags, paper towels, plastic sheeting to cover tables, protective goggles/eye glasses, scissors, scotch tape, staplers, staples, string (to hang items up to dry), tables
Facilities	broom, canopies, caution tape, cones for parking, disinfectant, duct tape, extension cords, fire extinguishers, gloves, hammer, ice, ice chests, ladder, light generators, parking cones, post setters, Sharpies, shop brooms, signage, squeegees, trash bags, trash cans, vests for parking people, wash stations for latrines, water coolers, water hoses
Health/Safety	canopy, cot, flag (w/ red cross), flag pole, first aid box, insurance form (available from District Executive), table
Opening/ Closing	American flag, awards, batteries (for megaphone or cordless mic), district flag, extension cord, flag poles, fire extinguisher, PA equipment, sound equipment, table, tarp to cover sound equipment (for rain or dew), wood for fire
Registration	air horn, baggies, batteries, blank registration forms, canopy, change, clip board, copies (e.g., medical forms, registration forms, maps, schedule), emergency contact sign, envelopes, extension cord, file box, file folders, fire extinguisher, highlighters, lost & found box, money bag, medical forms, paper clips, patches, pens, poster board, post-it notes, registration packets (containing name tag, schedule, map, evaluation form, information), registration sign, rubber bands, safety pins, scissors, Sharpies, sign-in sheet (for guests, adult volunteers, boy scout volunteers), staff name tags, stapler, staples, tables, tape (masking, duct, clear packing), timer (to remind when to blow air horn), trash bags, t-shirts, wrist bands, zip ties



## **Council Quartermaster Committee**

All non-consumable Program Equipment (e.g., water coolers, tables, BB guns) that has been purchased through an event budget is owned by the Council and can only be stored at a Council approved storage location. District storage sheds are not allowed even if they are free. The Council Quartermaster Committee is responsible for purchasing the equipment. Consumable program materials are purchased through the district. Five percent of each activity budget is used to purchase equipment. It is critical that districts take care of all equipment and return the equipment better than they found it.

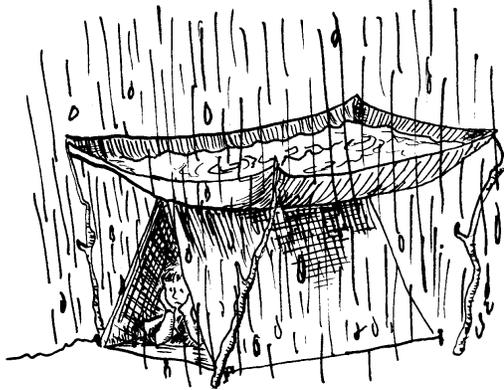
All BB and Archery equipment is stored at the Council office and may be checked out by a certified rangemaster or District Executive. Appendix J

Updates to this section are coming soon.



## Location! Location! Location!

Reserve the location early. Consider the following questions while you are looking for the ideal site. Please note that, **ONLY** the District Executive can enter into a contract for the Boy Scouts of America and obtain funds for a security deposit, if necessary.



- How many people are expected to attend?
- Is it an indoor or outdoor event?
- What types of permits are necessary (e.g., fire, police, health)?
- Is there a cost involved or deposit necessary?
- Is the area a secure, safe area? Be sure to have the Health and Safety officer inspect to make sure.
- Does the facility require security guards?
- Is there a contract that needs to be signed?
- Is a copy of a certificate of insurance from SHAC required?
- Is a standby location in case of bad weather needed?
- If an outdoor event, does a rain date need to be reserved?

## Promotion and Publicity:

Promotion is a key part of all events. Without communicating the details to others, there won't be a strong turnout. It's never too soon to let people know about your event. Get your date set and let everyone know so they can get it on their calendar. There are many ways the event can be promoted.

Having a display at roundtable and District training events with flyers and registration forms is a great way to get the word out. An event can also be promoted through Yahoo groups, Commissioner service and one-on-one interaction. Be sure each unit receives information about the event. Additionally, flyers and registration forms can be passed out at Program Preview and other district events – make sure the audience is the same. Avoid announcing Cub Scouting events at Boy Scouting events or vice versa since this can be confusing to some; however, you may want to recruit Boy Scouts to help staff Cub Scout events. As the event approaches, call-downs can be effective at targeting some last minute registrations. Promotions should be Key Staff position; however, all Key Staff should publicize the event within their unit and around the District.

Several months before the Event, details about the event should be summed up in a short paragraph and submitted to the District Communications and Media Chair to be placed on the district web and social media sites and possibly to generate publicity in community and local papers.

An event must be presented at least 7 times before it sounds important. Remember KISMIF can also mean “Keep it secret, make it fail.”



## Registration Forms:

Make the registration form bright and beautiful, but most of all make it CLEAR and CONCISE. Extra preparation will save you from a really big headache in the long run. Registration forms should be provided to units as earlier as possible (at least 4 months before the event date). It takes time for the information to flow throughout the unit leaders, the boys, and the parents. Pass out registration forms at Program Preview, Roundtable, district trainings, and all district events.

Use information from registration forms to assemble packets and ensure a smooth, efficient check-in procedure at the event. Information to include:

- Event Name, Location, Date (and rain date), Time
- Registration fees (early registration incentive and late or on-site fees) for Scouts, sibling, and adults (if applicable)
- Registration deadlines
- Registration instructions (where to send)
- Refund policy
- Theme of the event
- Who is to attend the event
- Planned activities and tentative schedule
- Leader in charge and contact info.
- State if siblings can attend
- Talent Release (if you are going to post pictures on the SHAC Website)
- SHAC Activity Account Number (get this number from the District Executive)
- How/when to turn-in registration form/money
- Items to bring (e.g., water, closed toed shoes, snacks, cup, uniform, medical form, chair)
- Possible skills that Scouts may need to know
- Amount \$\_\_\_\_\_ enclosed. "Make checks payable to SHAC"
- Are medical forms and permission slips required to be submitted with registration

Information to collect from the registration form

- Scout's Name, contact info
- Unit
- Parent or Leader contact info.
- Medical information (including any disabilities and dietary restrictions)
- Emergency contact
- T-shirt sizes
- Rank



SAMPLE REGISTRATION FORM

XYZ District Event
XX XX, 2012



Schedule: 7:30 - 7:45 Check-in
8:00 - 11:15 Program
11:45 - 12:30 Awards and Drawings

Location:

Cost: Early registration (includes a patch) \$4.00 per scout
Registration (on-site or after xx/xx/xx) \$6.00

Registration: Registered scouts and boys considering joining scouts may register for this event. Refunds will not be given. Substitutions are allowed. Patches are not guaranteed for late registrations.
1) Forms may be turned in at Roundtable (date) at (location) from 7:00 - 9:00.
2) Forms may be turned in at \_\_\_\_\_

Rules:

What to Bring: • Scout uniforms, Class A or Class B (any scout t-shirt)
• Hat, appropriate clothing for any weather, closed toed shoes, insect repellent, and sunscreen, rain gear
• Water bottle or cup
• Optional: chair, snacks, hand cleaner (e.g., gel sanitizer, baby wipes), tackle box

Program: Scouts will participate in .....

Rain date: A rain date is scheduled for xx/xx/xx. In the event of really bad weather, a message will be left on our hotline (xxx-xxx-xxxx) if the event has to be cancelled and an e-mail will be sent out to everyone on our district e-mail list (instructions for signing up for district e-mail).

Photographs: Notice! Please be advised that promotional videotaping/photography may be in progress at any time at an event. Your entrance constitutes your agreement that \_\_\_ District has the right to reproduce your likeness in videography/photography for promotion (e.g., publications, internet, newspaper). If this is an issue, you must notify the event chair the day of the event.

Awards: 1st, 2nd and 3rd place trophies will be awarded.....

Contacts: Name, number, e-mail

Talent Release: (use if you are going to take photos/video and are not going to keep the talent release on the medical forms). Please be advised that promotional videotaping or photography may be in progress at any time at an event. Your entrance at \_\_\_\_\_ constitutes your agreement that Sam Houston Area Council (SHAC) has the right to use and publish the photographs/film/ videotapes/ electronic representations and/or sound recordings made of you or your child at \_\_\_\_\_, and releases the Boy Scouts of America, SHAC, \_\_\_ District, the activity coordinators, employees, volunteers, related parties, or other organizations associated with SHAC from any and all liability from such use and publication. SHAC may reproduce, sale, copyright, exhibit, broadcast, electronic storage, and/or distribution of said photographs/film/videotapes/ electronic representations and/or sound recordings without limitation at the discretion of the BSA, and you waive any right to any compensation for any of the foregoing.

2012 \_\_\_\_\_ Event
Registration Form

(one per person)

Name: \_\_\_\_\_ Unit: \_\_\_\_\_ Phone: \_\_\_\_\_

Parent(s) Attending: \_\_\_\_\_ E-mail: \_\_\_\_\_

Cub Rank (circle one): Tiger (1st grade) Wolf (2nd grade) Bear (3rd grade) Webelos I (4th grade) Webelos II (5th grade) Sibling

Make checks payable to SHAC (acct #: ##### on memo) \$X.00 (\$X.00 after xx/xx/xx) Amount enclosed: \$ \_\_\_\_\_

Date received: \_\_\_\_\_

cash or check # \_\_\_\_\_



## Organizing the Event

### Staff Development:

The success or failure of an event can depend upon the staff. Here are some important factors that determine the staff's effectiveness.

1. Proper attitude toward the Scouting and its goals.
2. Correct uniforming
3. Adequate preparation
4. Proper control of time
5. Knowledge of subject matter or program

To help prepare the staff, the event chair should:

1. Make assignments to fit the talents and abilities of the staff members.
2. Hold a planning meeting well in advance.
3. Meet in advance to:
  - a. Be sure they have the facts correct and are up to date on current policy.
  - b. Make sure the program presented is relative and relevant to the purpose of the event.
  - c. Make sure the program stays within the time permitted.
  - d. Be sure each person knows what is expected of him/her.
4. Be prepared for emergencies. Have a backup in mind.
5. Stay in touch with the staff in order to assist with any problems which may occur.

During staff meetings give everyone a chance to know each other. Have some informal time with refreshments or an ice-breaker to get acquainted. Lots of folks won't speak up in front of a group of "strangers." You need to be the instigator or creator. Get the ball rolling. If you're enthusiastic, others will join in. Creativity can trigger more creativity and so on, and so on. And remember, ideas come from everywhere. Share ideas and resources with others. Networking pays off.

### Neanderthal Brainstorming By Millbauer and Yager



### Rubbing sticks? What a stupid idea!

**Brainstorming** can be an effective way to generate lots of ideas. Brainstorming should be performed in a relaxed environment. If participants feel free to relax and joke around, they'll stretch their minds further and therefore produce more creative ideas. It is designed to help you break out of your thinking patterns into new ways of looking at things.

During brainstorming sessions there should be no criticism of ideas. Ideas should only be evaluated once the brainstorming session has finished - you can then explore solutions further using conventional approaches.

When brainstorming, set up the rules (i.e., the leader has control; everyone contributes; no one will insult, demean, or evaluate another person's response; there are no wrong answers; each answer is recorded; setting a time limit). The facilitator should write responses (no matter how silly or impossible an idea seems) on a white-board, flip chart or poster board while guiding the session, encouraging participation, and allowing participants to build on each others' ideas. Laughing is to be encouraged while criticism is not. Brainstorm event themes, event locations, and activities.



**Sample Theme Ideas**

Animals, Bugs, Farm, Insects, Zoo	Crime Prevention	Jungle, Safari	Pioneering
Anniversary	Customs around the world	Knights	Pioneers
Camping	Derbies (Pinewood, Space, Regatta)	Knots	Pharaohs
Canoeing	Detectives, Spy	Magic	Rock Climbing
Careers	Dinosaurs	Merit Badges	Science, Energy, Weather
Carnival	Emergency Preparedness	Movies, Showbiz, Big Screen	Space
Circus	Fiesta	Music	Spookery
Citizenship	First Aid	Native Americans	Sports, Olympics, Fitness
Collections	Heroes	Nature, Environment	Transportation, Planes, Trains, Boats
Computers	Hiking	Orient	Tropical
Construction	Hobbies	Orienteering	Wilderness Survival
Cooking	Imagination	Patriotic, America, Texas	Wild, Wild West

**Selecting Activities**

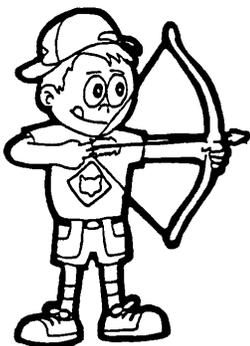
Parking...Check-in...Early Bird Activities...Opening...Evaluation...and Closing...all make the event fun---or not so fun---for the participants, so consider each carefully in your planning.

In planning the activities which will take place at an event, the sky’s the limit! So how do you choose? The following questions keep you focuses on the boys and theme

1. Will this activity help you move closer to you objective?
2. Is this an activity the boys/adults want and is appropriate to the age/experience of the participants? Refer to the Cub Scout Leader Book and the Scoutmasters Handbook to get some guidelines concerning “Understanding Boys.” Send out a questionnaire asking boys/adults what activities they would like.
3. How will the activity fit into the overall plan? Is a special site necessary? If so, what type? Will bad weather affect this activity? What adjustments would be necessary?
4. What preparation will be necessary for this activity? What special equipment or supplies are needed? Will boys need to learn special skills before the event? How will you pay for the costs involved? Remember SAFETY!

Once you know the answers to the above question, decide which activities to include and overall schedule will best fit the activities. Remember boys will be participating. Will these activities appeal to them?

**Check-in**



Before the event, walk through the event from getting out of the car, finding registration, first aid, and all of the events. Check-in is the first thing you see at the event and it makes a lasting impression. Registration should take no more than five minutes. Overstaff check-in with enthusiastic helpful and informed volunteers. No one wants to wait in a long line to check-in and then ask a simple question no one can answer. You may want to have event and/or campsite layout maps available so everyone knows where they are going or the staff can direct them.

Get participants involved in activities quickly—plan for a fast check-in procedure and early bird activities. Divide the check-in procedures so the boys/units can get their packets very quickly without waiting in line. Packets may contain: name tag, schedule, map, evaluation form, and information sheets.

Make sure everyone knows what comes next – schedules for all!! Use air horns or other loud noise for a signal. Have Event staff easily identifies (hat, t-shirt, costume, ect) in order to answer questions that leaders/boys have.



Some materials registration may want to have available: air horn, baggies, batteries, blank registration forms, canopy, change, clip board, copies (e.g., medical forms, registration forms, maps, schedule), emergency contact sign, envelopes, extension cord, file box, file folders, fire extinguisher, highlighters, lost and found box, money bag, medical forms, paper clips, patches, pens, poster board, post-it notes, registration packets (containing name tag, schedule, map, evaluation form, information), registration sign, rubber bands, safety pins, scissors, Sharpies, sign-in sheet (for guests, adult volunteers, boy scout volunteers), staff name tags, stapler, staples, tables, tape (masking, duct, clear packing), timer (to remind when to blow air horn), trash bags, t-shirts, wrist bands, zip ties

- Have someone in the parking lot to direct traffic and to stop parents from just dropping off boys. Ask them to wait until their son has checked in. This may eliminate parents having to come back if all the paperwork is not properly completed.
- It is the responsibility of the parents, leaders, and check-in staff that all registration and medical forms are received on each participant (including adults and siblings) entering the event.
- If necessary forms are not provided by the unit or youth, or someone is improperly attired, it will be the leader's responsibility to call the boy's parents to come fill out the required forms, bring different clothing, or pick up the boy.
- After checking in give the boys something to do until the opening begins.
- Have lost and found box available.

### Opening

- Openings can be as simple or elaborate as you want. It marks the official beginning of the event. Make sure that an effective sound system is used.
- Welcome and give reason for event
- Introduce Staff
- Make announcements (if possible provide written announcements)
  - evacuation plan
  - first aid location
  - toilet facilities
  - handwashing facilities
  - smoking areas
- Explain schedules
- Explain check-out procedures



### Check-out

- Inspect campsites and event sites before dismissing the units and staff and providing them with the departure packets. Be sure to leave the site better than you found it.
- Make sure all fires are properly put out.
- Collect evaluations.
- Dispose of trash bags in proper manner.

### Closing

- Closing mark the event as being officially completed
- Thank everyone for attending
- Present awards
- Thank staff volunteers
- Remind everyone of check-out procedures
- Request help for clean up
- Display lost and found items



## Evaluations

Have the participants evaluate prior to departure, with the evaluation form fitting the age of the participants. Have a box at registration to collect the evaluation forms or consider handing out the event patches when the evaluation forms are received. Website survey (e.g., surveymonkey.com) can also be utilized. You may choose to have a written, oral, or website (e.g., surveymonkey.com) evaluation by individuals, dens, patrols, or units, and even separate youth and adult forms. Design the evaluation questions so those who attended the event will understand them and are easily tallied. Perhaps younger boys could be asked to react with one word (e.g., super, okay) that best describes each activity, or the reliable happy or sad face marked for each activity. The key questions to ask are: Was the job done, done right, and on time? Did everyone take part? Enjoy themselves? Are they ready for more? Some questions you may want to ask:

- What should we include or leave out next time?
- How did you hear about the event (e.g., leader, Cubmaster, Roundtable, district newsletter, website)?
- Proposed improvements?
- How could we make the event better?
- Were the events prepared?
- Was there sufficient leadership?
- Did the events run on-time?
- Rate the following (registration, bathrooms, activities, campfire, opening) on a scale of 1 – 5.
- Rate the staff

Evaluations allow the event attendees to communicate back to you. This is their time to give you necessary feedback as the final step in a quality event. With all the planning and executing, something is likely to be overlooked, forgotten, missed – be sure to receive the words of others as a gift to ensuring the future success of an event.

Key Staff should also write a review of his/her job with suggested ideas and changes to be handed to the Event Chair to include in the Event Diary. Plan a Staff evaluation meeting to hash out the pros and cons of the Event, always ending on a good note. This is a good time to distribute thank you's if you did not do so at the closing ceremony of the event.

## Environmental Issues

The Boy Scouts of America are very aware of the environment. You should think out any activities, crafts, etc. ahead of time as to how this is going to affect the environment.

- Are you going to use any special chemicals in a craft? If so, what disposal process will be used?
- Have a recycling bag for aluminum cans. Include this in your announcements at the beginning of the event.
- Use extreme caution with balloons. All remnants must be picked up. They can injure animals.
- Scouts should always leave an area cleaner than when they found it.
- Have smoking area marked and have butt cans available.
- Snip plastic pack rings before putting in the trash.
- Remind the participants to bring drinking cups.
- Avoid using glass if possible.
- Make sure all fires are properly put out.
- Wrap any glass before putting it in the trash.





## Recognize your volunteers



Recognition is very important!!! Everyone appreciates recognition. One of the best ways to keep your leaders and other volunteers coming back is to recognize them for all their efforts. It is common to give Key Staff a certificate of appreciation, or plaque; however, a smile, and a warm, hardy, well-deserved pat on the back can go a long way to making a volunteer feel appreciated.

Thank your volunteers often both privately and publicly. Thank them at staff meetings, at the event (e.g., during cracker-barrel, opening/closing ceremonies), and at other District events (e.g., Roundtable, District Dinner, District Committee Meeting). Send an informal note of thanks. Tell others of your volunteer's contribution. Praise them on the job. Submit a Kudos to be included in your District newsletter or on the District website thanking them for their service.

There are all types of awards, many of which can be either serious or fun (see below for more ideas). Be creative! And don't worry about being too corny – remember this is the Scouting program! In lieu of a store bought plaque or certificate (<http://dyetub.com/certificates/scouting>), consider giving homemade plaque, gift, neckerchief slide, item to use for Scouting, or special staff name tag/badge. Also consider giving Key Staff a special colored event t-shirt to wear during the event (this also makes them easily recognizable for participants).

Nominate deserving leaders for District Awards. [Hint: as part of their recruitment, ask them for a Scouter resume (<http://boyscouters.org/bayshore/forms/resume.doc>). It should have the positions they have held and when as well as events they have chaired or assisted. This way you have all the background that is necessary for a proper nomination. This type of information is otherwise difficult to get without it being obvious as part of an award.]



## First Aid

Each District Event must have a designated staff person in charge of First Aid. The District Health and Safety officer will select a trained person to be in charge of the First Aid station. The Health and Safety team is responsible for setting up an a well-equipped tent or shelter for first aid; providing all necessary first aid equipment; recording all persons treated in the First Aid Log Book; displaying a large red cross flag for identification; obtaining fire permits (if required) and ensuring that fire safety is maintained; checking the water supply; surveying toilet facilities and arranging for temporary latrines if necessary; ensuring that toilet paper and wash water are at latrines; having a vehicle available for emergencies; and ensuring that safety is maintained.

The First Aid location should be on the event map and clearly marked with a large red cross flag. The First Aid Station should have its own first aid kit in addition to any first aid kits that units may have. Emergency numbers (e.g., police, fire, area hospitals/clinics) should be posted. Directions to the area hospitals and copies of the SHAC insurance forms should be handy. Medical forms collected by registration should be readily available to the First Aid staffers. Consider placing the First Aid station next to registration.

Before the event, the First Aid staff should work with the Facilities and Program staff and provide input on the location of all activities to ensure that safety requirements are met and should also be involved in developing the back up plan for emergencies. The event/district first aid kit should be checked to make sure that all items are stocked and up to date.



Medication forms are now on the medical form available at [www.scouting.org/scoutsource/HealthandSafety/ahmr.aspx](http://www.scouting.org/scoutsource/HealthandSafety/ahmr.aspx) for scouts who need over-the-counter or prescribed medications administered at the event. All medications should be in the original container and administered in the prescribed dosage by the responsible adult as per the written instruction by the parent or guardian.

The event Health and Safety Chair must record each incident and injury no matter how minor in the district bound First Aid logbook. Fill each line. Do not skip lines or double space. It is advisable to retain these logs for at least one year after the date of the event. This may be very useful for insurance purposes.

If an accident should occur that requires a trip to the emergency room, the District Activities Chair and the District Executive should be notified as soon as possible.

## Health and Safety

The Council Accident and Sickness Insurance Plan is provided for Cub Scouts, Boy Scouts, Venturers, and adult volunteer leaders registered in the council, and covers them for accidents and sickness while participating in any official Scouting activity. Claim forms are available from the District Executive. The Health and Safety officer should have claim forms at each District event. In case of an accident, it is easier to have the form filled out immediately, although it may be filled out after the event but one **MUST** be filled out for each incident. The District Executive should be notified immediately of all serious incidents or accidents. This reporting obligation applies to ANY incident related to an YPT (Youth Protection Training) incident. While planning and executing a District event, health and safety matters should always be a major consideration. Consult the latest issue of the Guide to Safe Scouting (<http://scouting.org/scoutsource/HealthandSafety/GSS.aspx>) for updates.



**Adult Leadership** – Adult leaders in attendance at district events should be trained in the Youth Protection program of BSA. YPT Training is available on-line at: [www.myscouting.org](http://www.myscouting.org). The guidelines of two-deep leadership and no one-on-one contact should be followed at all times. Male and female adult leaders (unless married) and male and female youth participants require separate sleeping quarters. No youth will stay in the tent of an adult other than his or her parent or guardian. Separate shower and latrine facilities, a buddy system, or “occupied” signs should be provided for male and female use. More details are available at: <http://scouting.org/scoutsources/HealthandSafety/GSS/gss01.aspx>

**Aquatics Safety** – Generally, district events do not include the opportunity for aquatic activities. If aquatic activities are part of the program, all swimming activities will be conducted according to the eight points of the Safe Swim Defense ([www.scouting.org/pubs/gss/gss02.html](http://www.scouting.org/pubs/gss/gss02.html)). Safe Swim and Safety Afloat Training is available on-line at: [www.myscouting.org](http://www.myscouting.org)



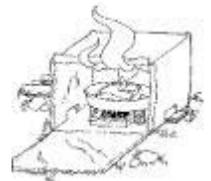
**Camping** – Overnight camping by Cub Scout dens is not approved for District Events and certificates of liability insurance will not be provided by the Boy Scouts of America. A Webelos Scout may participate in overnight camping (e.g., Webelos Woods) when supervised by his mother or father. If a parent cannot attend, arrangements must be made by the boy’s family for another youth’s parent (but not the Webelos leader) or another adult relative or friend to be a substitute at the campout. All Boy Scouts and Venturers and Varsity Scouts may participate in overnight campouts and Camp-o-rees. <http://scouting.org/scoutsources/HealthandSafety/GSS/gss03.aspx>

**Drug, Alcohol, and Tobacco Use and Abuse** – The Boy Scouts of America prohibits the use of alcoholic beverages and controlled substances at encampments or activities on property owned and/or operated by the Boy Scouts of America, or at any activity involving participation of youth members. All Scouting activities should be conducted on a smoke-free basis, with smoking areas located away from all participants. <http://scouting.org/scoutsources/HealthandSafety/GSS/gss04.aspx>

**Emergency Preparedness** – Develop and practice an emergency action plan for contingency situations which may arise. These emergency action plans must include the person in charge, action to be taken, alternatives, people and agencies to notify, location of law enforcement, fire, and health facilities, and evacuation procedures. <http://scouting.org/scoutsources/HealthandSafety/GSS/gss05.aspx>

**First Aid** – At least one person assigned by the District Health and Safety officer should be on the event staff at every district event who is trained in the principles of first aid, knows how and when to put this knowledge to the best use, and thoroughly understands the limitations of this knowledge. An emergency action plan should also be developed to deal with major first aid emergencies. <http://scouting.org/scoutsources/HealthandSafety/GSS/gss06.aspx>

**Food Preparation and Storage** – Local guidelines (e.g., [www.hcphes.org](http://www.hcphes.org)) should be followed. Water and ice used for consumption must be from an approved source. Provide potable water for cleaning and sanitizing utensils, including a heating facility capable of producing hot water and three containers for washing, rinsing, and sanitizing. Liquid chlorine bleach shall be provided for use in sanitizing work surfaces (1/3 cup per 5 gallons of water). Facilities should be available for hand washing. Do not store food in contact with water/undrained ice. Protect food that is served (keep hot foods at 140°F or above and cold foods at 41°F or below). No eating, drinking, or smoking is allowed in the food preparation area.





**Fuels and Fire Prevention** – Adult supervision is required when chemical fuels are being used for lighting and cooking. Fuel should be stored in approved containers and under adult supervision. “No flames in tents” is a rule that must be enforced and all fire laws ordinances, and regulations must be obeyed. BSA prohibits the securing, use, and display of fireworks in conjunction with programs and activities except where the fireworks are conducted under the auspices of a certified or licensed fireworks control expert.  
<http://scouting.org/scoutsource/HealthandSafety/GSS/gss07.aspx>

**Guns and Firearms** – Except for law enforcement officers required to carry firearms within their jurisdiction, firearms shall not be brought on camping, hiking, backpacking, or other Scouting Activities except those specifically planned for target shooting under the supervision of a currently certified BSA or National Rifle Association firearms instructor. Cub Scouts participation in archery and BB gun shooting are restricted to day camps, where there are properly trained supervisors and all standards for BSA shooting sports are enforced. Archery and BB gun shooting are not to be done at the pack level. Cub Scouts are not permitted to use any other type of handgun or firearm.

Boy Scouts are permitted to fire bows and arrows, BB guns, .22-caliber bolt-action, single-shot rifles, air rifles, shotguns, and muzzle-loading long guns under the direction of a certified instructor, 21 years of age or older, within the standards outlined in current Scouting literature and bulletins. BSA policy does not permit the use of handguns in the Boy Scouting program. <http://scouting.org/scoutsource/HealthandSafety/GSS/gss08.aspx>



**Sports and Activities** – Special precautions relating to sports and activities (including the Sweet 16 of BSA Safety), Project COPE, unauthorized and restricted activities, knives, rope bridges, parade floats and hayrides, bike safety, skating guidelines, and horsemanship <http://scouting.org/scoutsource/HealthandSafety/GSS/gss09.aspx>. Hazardous sports and activities, such as cave exploring, judo, rock climbing and repelling should not be part of any District event program.

**Inspections** – The locations of the event should be carefully inspected for potential health and safety hazards. For indoor events, the Meeting Place Inspection checklist (<http://scouting.org/filestore/pdf/mpinsp.pdf>) should be used (<http://scouting.org/scoutsource/HealthandSafety/GSS/gss10.aspx>). For outdoor events, there are three occasions that require additional inspections to ensure a safe, livable camp and unblemished site after you leave: (1) after camp is set up, (2) after camp is taken down, and (3) periodically between.

**Medical Information** – BSA has established minimum standards (<http://scouting.org/scoutsource/HealthandSafety/GSS/gss11.aspx>) for providing medical information prior to participating in various activities. Be familiar with these standards as they relate to the event you are planning and be sure to communicate the need for proper class medical form (and its associated consent to treat form) to the event attendees well in advance.

Medical Forms: [www.scouting.org/scoutsource/HealthandSafety/ahmr.aspx](http://www.scouting.org/scoutsource/HealthandSafety/ahmr.aspx)

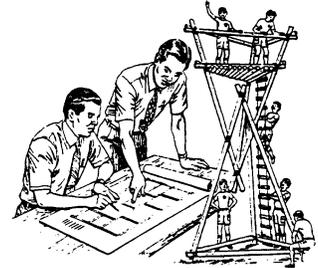
**Transportation** – Attendees at all Scouting events must follow the guidelines (<http://scouting.org/scoutsource/HealthandSafety/GSS/gss12.aspx>) established for automobile travel to and from the event. Specifically, these guidelines discuss that all occupants must wear seat belts, all drivers must be licensed, no passengers in the beds of pick-up trucks, and adequate insurance coverage of each vehicle.



**Winter Activities** – While this does not generally apply to the Houston area, leadership, equipment, and physical conditions should be considerations just as they are for any camping trip.

<http://scouting.org/scoutsource/HealthandSafety/GSS/gss12.aspx>

**Age-Appropriate Guidelines for Scouting Activities** – Age- and rank-appropriate guidelines have been developed based on the mental, physical, emotional, and social maturity of Boy Scouts of American youth members. See <http://www.scouting.org/filestore/pdf/ageguides.pdf> for a list of guidelines for Cub Scouts, Webelos, Boy Scouts, Venturing, and Varsity Scouts for activities including outdoor skills, sports, tools, trekking, shooting, aquatics, and climbing.



**Reporting Deaths or Serious Injury** - If a serious injury or fatality occurs it is important to first care for the injured and prevent further injuries. Call 911 for help and begin providing first aid. Immediately notify the District Executive. Once proper authorities, parents and Scouting officials have been notified, the adult leadership should gather factual information at the scene, including statements of witnesses, leaders and members of the group. These reports can be supported by photographs and/or diagrams.

<http://scouting.org/scoutsource/HealthandSafety/GSS/gssdeath.aspx>

**Forms:** <http://scouting.org/scoutsource/HealthandSafety/GSS/gssax.aspx>



## SHAC General Liability Insurance for Volunteers

Listed below are brief outlines of insurance coverage's provided by or through the Sam Houston Area Council:

### COMPREHENSIVE GENERAL LIABILITY INSURANCE

This coverage provides primary general liability coverage for registered volunteer Scouters with respect to claims arising out of an official Scouting activity with the exception that the coverage is excess over any insurance which may be available to the volunteer for loss arising from the ownership, maintenance, or use of a motor vehicle or watercraft. This insurance is only available while the vehicle or watercraft is in the actual use of a Scouting unit and being used for a Scouting purpose. Coverage is more than \$15 million for bodily injury and property damage. Because of the high limits, volunteers should NOT be placed in a position where their assets are jeopardized because of a negligence liability claim or lawsuit. The insurance provided unregistered Scouting volunteers through the BSA general liability insurance program is excess over any other insurance the volunteer might have to his or her benefit, usually a homeowner's, personal liability, or auto liability policy. There is no coverage for those who commit intentional or criminal acts.

### AUTOMOBILE LIABILITY INSURANCE

All vehicles MUST be covered by a liability insurance policy. The amount of this coverage must meet or exceed the insurance requirement of the state in which the vehicle is licensed. (It is recommended, however, that the coverage limits are at least \$50,000/\$100,000/\$50,000). Any vehicle carrying ten (10) or more passengers is required to have limits of \$100,000/\$500,000/\$100,000 or \$500,000 single limit. In case of rented vehicles the requirement of coverage limits can be met by combining limits of personal coverage carried by the driver with coverage carried by the owner of the rented vehicle. All vehicles used in travel outside the United States must carry a liability insurance policy that complies with or exceeds the requirements of that country. The council's automobile liability insurance is excess of the insurance the owner of the auto carries, providing insurance protection above the limits carried on the auto up to the council's \$15 million limit of coverage.

### COUNCIL ACCIDENT & SICKNESS INSURANCE PLAN

This Accident and Sickness Insurance is provided for Cub Scouts, Boy Scouts, Venturers, and adult volunteer leaders registered in the council, and covers them for accidents and sickness (as well as accidental death and dismemberment) while participating in any official Scouting activity. This coverage is applied for by the council and is in effect on an annual basis. Claim forms and an Adult Leader's Guide brochure is included with each Unit Charter Renewal Kit. The cost remains at \$1.00 per youth member, paid with Charter Renewal. All new youth and adults added after Charter Renewal are automatically covered at no additional charge. (LDS units have separate coverage provided through their church.). Additional information on coverage, limits, etc., may be obtained by contacting SHAC Program Services.

### REPORT ALL SERIOUS INCIDENTS, ACCIDENTS, OR IF A SUMMONS IS SERVED ON A VOLUNTEER, TO PROGRAM SERVICES, 713-756-3306.

### TOUR PLAN: [www.samhoustonbsa.org/leader\\_resources/health\\_forms\\_tour\\_permits\\_and\\_guide\\_to\\_safe\\_scouting](http://www.samhoustonbsa.org/leader_resources/health_forms_tour_permits_and_guide_to_safe_scouting)

The tour plan is an important tool for conducting local, national, or international activities and is a checklist for best practices to be prepared for safe and fun adventure. Completing the tour plan may not address all possible challenges but can help to ensure that appropriate planning has been conducted, that qualified and trained leadership is in place, and that the right equipment is available for the adventure. In addition, the plan helps to organize safe and appropriate transportation to and from an event, and defines driver qualifications and minimum limits of insurance coverage for drivers and vehicles used to transport participants. Times when a tour plan must be submitted for council review include:

- Trips of 500 miles or more
- Trips outside of council borders not to a council-owned property
- Trips to any national high-adventure base, national Scout jamboree, NOAC, or regionally sponsored event
- When conducting the following activities outside of council or district events:
  - Aquatics activities (swimming, boating, floating, scuba, etc.)
  - Climbing and rappelling



- Orientation flights (process flying plan)
- Shooting sports
- Any activities involving motorized vehicles as part of the program (snowmobiles, boating, etc.)
- At a council’s request

Please complete and submit this plan at least 21 days in advance to ensure your council has enough time to review the plan and assist you in updating the plan if it is found defective. When review is complete, the second half of the plan is returned to you to carry on your travels.

### Portable Toilets

The following guidelines should be followed as to minimum requirement for toilet facilities: (1) one toilet per 120 persons for one day events, (2) one toilet per 100 persons for two day events, (3) one toilet per 80 person for three day events. At least one handicapped toilet should be ordered. Cub Scout events must have “step-up” provisions in the toilets. Some companies offer a cleaning service which may reduce the number of cans needed for longer events. Remember to ask if toilet paper is included.

Below is a list of companies found on the Internet (these are not endorsed or recommended by SHAC). The prices listed are typical weekend rates for the greater Houston area and do not include tax. Most companies will lower prices based on the number of cans ordered. Also, most of the companies mentioned that they would lower the prices to give a competitive rate. Some will even drop the delivery free and/or offer free cleanings.

Prices quoted 8/05	Regular	Handicapped	Cleaning (if needed during the event)	Delivery fee
<b>American Sanitation Services Inc</b> 5930 Waltrip Street, Houston, TX 77087 (713) 641-6161	~\$100	~\$130	varies	none
<b>BFI</b> (713) 948-7600	~\$80	~\$125	~\$25/can	none
<b>Fresh Can</b> 2715 Fm 2917 Road, Alvin, TX 77511 (281) 393-1600	~\$60 (rates for South Houston, Baytown)  awesome service	~\$95	~\$25/can (cheaper if more than 5)	\$15
<b>PDQ Portable Toilets &amp; Big K Environmental</b> 423 Little York Road, Houston, TX 77076 (713) 691-6666	??  quote changed with every phone call	??		
<b>Port-O-Let A Waste Management Company</b> 3520 Pansy, Houston, TX 77002 (281) 487-5000  2175 West Cardinal Drive, Beaumont, TX 77705 (713) 686-6666 – for quotes	~\$75	~\$110	~\$10-15/can	\$15



## Ordering patches

1. Patch designs should be submitted to three BSA licensed patch companies no later 12 weeks prior to the event. Designs may be a drawing or an electronic version. Submit details on number of colors, twill (partially) or fully embroidered, shape, size, date patches are needed, approximate numbers needed, if a loop is needed, event chair contact information, and district. Do not ask for artwork until after the bid has been accepted or you will be charged up to \$150 for artwork if you do not use the company.
2. After the bid is accepted, request a PO from the District Executive and provide this to the patch company. The patch company will then produce an electronic version of the patch for approval. The electronic version of the patch will then be sent to the event chair and District Executive for approval. Changes can then be made quickly. Allow 4-6 weeks from final approval of the artwork to delivery of the patches.

### Design hints:



- Patches must have a fleur-de-lis or BSA somewhere on the patch. Both the FDL and BSA are copyrighted and can only be used by a BSA licensed vendor. Be creative when placing a FDL in the patch (e.g., sun in the shape of a FDL, use ghost technique – see below, hide the FDL in an object).
  - Do not use copyrighted materials without written consent. Clipart may be used as long as it's not copyrighted.
  - Be careful about using too many details. Space is limited. If you cannot draw it with colored pencils than it cannot be stitched with needle and thread into a patch.
  - Choose a strong key item instead of many items.
- Make your drawing the same size as the finished patch size desired, leaving 1/8<sup>th</sup> inch around the edge for the border color.
  - Use a contrasting color for the text words for visibility.
  - Seven colors in the base amount. The price goes up with each color after seven. Black and white is each considered a color. Using yellow in a patch brightens up a patch. You can use photo chromatic thread that changes color in the sunlight. Photo chromatic thread is available in several colors (e.g., silver, gold, red) but cost more.
  - Shadows are just a darker shade of the object's color.
  - Ghost items means an object is stitched in the same color as the area around the object; the object is just stitched in a different direction.
  - Twill patches (have a cloth background) are cheaper than Solid Embroidered patches.
  - Standard shapes and sizes (round, rectangle, square, diamond) are cheaper than laser cut patches in unusual shapes, but the laser cut patches can be very different and creative.
  - Smaller sized patches (2") are cheaper than larger (5") patches.
  - Be creative, and use your theme for ideas.



## **SHAC Budget, Purchasing and Invoice Payment Procedures**

### **Preparing the Budget**

Budgets for all district events are submitted in August for the next calendar year. The Activities Chair works with the Event Chairs to prepare the budgets for each event which then must be approved by the District Executive and Field Director before being submitted to the accounting department of the Council.

No money may be spent or orders placed for merchandise before budgets are approved by the District Executive, Field Director and Board of Directors. Money spent prior to approval will not be reimbursed.

- ✓ Use the Budget Worksheet (available from the District Executive) and review previous year's final budget. Plan the current budget based on: realistic figures, historical data, what worked/didn't work last year, will the numbers increase or decrease, cost figures (average cost to number of participants; e.g., \$5,000 divided by 150 people is roughly \$34).
- ✓ The proposed budget must include:
  1. last year's final budget,
  2. an administrative/quartermaster fee of 20% of projected revenue
  3. a detailed account of all expected income and expenses
- ✓ Submit the proposed budget to the Activities Chair, District Program Chair, and the District Executive for approval by early August. The District Executive then submits the proposed budget to the Council for final approval. Please know that other changes may occur, your District Executive is the best resource for any updates.
- ✓ Budgeting requires a careful balancing of fees which boys can afford against the activities which will accomplish the event goals. Before deciding on the event fee, make a careful listing of all anticipated expenses and compare that to a history of event attendance. Dividing the pre-planned expenses by the anticipated attendance, adding 5-10% for an expected increase in attendance, should give you an adequate base of what to charge per attendee.

### **Revenue and Field Receipts**

- ✓ The Event Chair and the District Executive are responsible for all expenditures and income.
- ✓ All income must go directly to the Council office and be receipted to the appropriate account. Registration fees and event account numbers need to appear on all registration forms for the event. Only Council accounts are permitted. District bank account, savings accounts or slush funds are not permitted.
- ✓ Field receipts (available from the District Executive) must be issued when taking in monies for an event.
- ✓ Reimbursement of expenses with cash received at an event is not permitted.
- ✓ The District Executive is responsible for turning in all event revenues and allocating it to the proper account.

### **Expenditures**

- ✓ Total expenses may not exceed the budget. Variations from the budget must be approved by the District Executive. Variations will only be approved if participation, therefore income, goes up. Taking into consideration the actual attendance, the expenses budgeted on each line item should not be exceeded. If participation decreases, a revised budget should reflect an adjustment downward accordingly.
- ✓ The Event Chair and District Executive must inform the Event Staff about budgetary limits and restrictions. Those approved to purchase event supplies will be informed exactly how much has been budgeted for each area or item. All purchases should be coordinated through the Event Chair since various areas may require identical items that could be shared to avoid excess materials. Since actual costs may vary from the budgeted amount it is understood that small variances are likely, but substantial variances require a budget adjustment.



If one budget item costs more than the budgeted amount, another item will have to cost less. Event chairs need to make sure that all event staff purchasing supplies remain within their budget limits. All expenditures must have a vendor issued original receipt.

- ✓ When ordering items, look for the best values (ask other districts, previous event chairs or at council coordinated meetings) and work within the parameters of budget (must justify costs).
- ✓ **Sales Tax:** SHAC is a section 501 (c) (3) non-profit organization and thereby exempt from paying sales tax. Tax Exemption can be claimed by presenting a Texas State Sales Tax exemption certificate (available to the Event Chair from the District Executive). Discuss the issue of our 501 (c)-(3) status with the manager of all retail establishments considered for materials. In some cases businesses require the certificate be on file in advance and this often takes some time to establish.
- ✓ **Quartermaster:** Contact your District or Division Quartermaster to determine what consumable (BB's, craft supplies) and non-consumable (tables, coolers, canopies, shooting sports equipment) supplies are available for your event. The Council Quartermaster Committee purchases all non-consumable equipment.
- ✓ **BSA License:** Only use licensed vendors to purchase items such as patches and t-shirts with BSA trademarks (e.g., fleur-de-lis) or that represent the Council, District or BSA. Visit [www.bsalicensing.org](http://www.bsalicensing.org) for more information. Determine if a vendor is licensed by visiting [www.scouting.org/sitecore/content/Licensing/Current%20Licensees.aspx](http://www.scouting.org/sitecore/content/Licensing/Current%20Licensees.aspx) or by emailing [licensing@scouting.org](mailto:licensing@scouting.org) (for local companies).
- ✓ **Bids:** At least 3 bids are required for larger purchases such as t-shirts, trophies, and awards.
- ✓ **Vendors:** A list of vendors is available at [www.shac.org/district\\_operation#activities](http://www.shac.org/district_operation#activities)

The District Executive is responsible for submitting all expense requests to the Council. Items or services for events may be purchased by one of the four methods. The methods are listed below in order of preference:

### 1. Purchase Orders

Purchase Orders are the preferred method for obtaining supplies. When possible, purchase supplies from vendors which will accept Purchase Orders. Most companies will accept a Purchase Order. Purchase Orders are required where they are accepted.

- a) Complete and submit a Purchase Requisition Form (Appendix E) to the District Executive at least 30 days before the event with a bid (quote) attached or a list the individual items that are needed along with the price.
- b) The District Executive will then secure a purchase order and will submit the white copy of the PO to the vendor. The Purchase Order has four copies:
  - ✓ **White** copy is provided by the District Executive to vendor to place purchase order number on invoices.
  - ✓ **Yellow** copy is retained by the Accounting Department as an open Purchase Order
  - ✓ **Pink** copy is retained by the Accounting Department in Purchase Order number sequence
  - ✓ **Goldenrod** copy is retained by District Executive and eventually used as approval of payment of invoice.

Send a copy of the Council Vendor letter (Appendix G) with every PO. Upon submitting the PO to the vendor, the District Executive must verify that the vendor has the correct billing information to invoice SHAC and remind them that the invoice must include the district name and PO number. This is an important step as many vendors have SHAC in their system under an old address or the system defaults to the previous district that made a purchase resulting in invoice payment being delayed. The vendor must send the invoice directly to the council who will then pay the vendor. The vendor may fax, e-mail or mail the invoice:

Sam Houston Area Council  
 attn: \_\_\_\_\_ District  
 PO Box 924528  
 Houston, TX 77292-4528  
[ap@shac.org](mailto:ap@shac.org)

Include: PO number: \_\_\_\_\_, Vendor's legal name, address, contact person, and date



- c) Upon receipt of invoice from the vendor, the Accounting Department forwards the invoice to the appropriate District Executive for approval.
- d) Upon verification of receipt of the goods or service, the District Executive returns the invoice with the goldenrod copy of the PO attached to the Accounting Department which authorizes payment of the invoice. The District Executive will advise the Accounting Department and note any discrepancies in the invoice in order that proper payments are made for goods and/or service received. The Accounting Department will not pay invoices until the goldenrod copy is returned authorizing payment.

## 2. Check Request

Some vendors require full payment before items may be removed from the premises. A check for the exact amount of goods or services can be requested through the District Executive using the Check Request form (Appendix F).

The image shows a 'Check Request' form with fields for Name of Assignee, Address, City, State, ZIP, and a section for 'Check Number' and 'Amount'.

## 3. Cash Advance Request



Cash advances for a very few specific reasons may be requested by the Event Chair on the Check Request form (Appendix F) and secured by the District Executive. Allow at least one week for the request to be processed. Vendor issued itemized receipts and/or unused money must be turned in to the District Executive as soon as possible but no later than the conclusion of the event. All receipts and/or unused money for a specific cash advance must be turned in before an additional cash advance can be obtained. Cash advances may be used for budgeted items only. All cash expenditures must have vendor issued receipts and must be accounted for exactly.

## 4. Reimbursement Request

Individuals may be reimbursed for cash purchases provided the expenses were approved in the budget and itemized original receipts are provided. Requests for reimbursement should be coordinated with the Event Chair and then requested through the District Executive. All receipts should be attached to a Check Request form (Appendix F) and turned into the Activities Chair or District Executive no later than one week after the event. **Receipts turned in more than 60 days after the event may not be paid.**

## Event Close Out Meeting (ECOM)

No later than two weeks after an event, an Event Close Out Meeting (ECOM) must be held with the Event Chair and District Executive to complete the ECOM Report (Appendix A). The District Activities Chair, District Program Chair and necessary Key Staff should be invited to the meeting.



## Appendix

A.	Event Close Out Meeting (ECOM) report and Event Diary*	33
B.	Event Budget*	35
C.	Sample Posted Detail Listing Report	36
D.	Sample Statement of Activity Operations Report	37
E.	Purchase Requisition*	38
F.	Check Request*	39
G.	Vendor Letter*	40
H.	District Event Work Plan*	41
I.	District Event Work Plan – Day Camp*	42
J.	Quartermaster Request*	43

\*Fillable forms are available at [www.shac.org/district\\_operations](http://www.shac.org/district_operations)





## ECOM Event Diary

<b>Location:</b> _____	<b>Contact Information</b> _____	
<b>Registration:</b> # Pre-registered: _____	# Onsite registration: _____	Total: _____
<b>Cost:</b> Early registration: \$ _____	Registration: \$ _____	Total: \$ _____
T-shirts: \$ _____	Extra patches \$ _____	Total: \$ _____
<b>Units Attended:</b> _____		

**Staff Descriptions.** *List all staff and their contact information.*

Staff Position	Name	Unit	e-mail	Phone	Cell

**Job Descriptions.** *List all staff positions and their detailed job descriptions.*

Staff Position	Job Description

**Important Contacts.** *List all vendors used and their contact information.*

Vendor	Contact, Number, E-mail, Address	Notes

**Equipment.** *List all consumable and non consumable supplies needed (including specific quantities) to run the event and where the supplies can be located.*

Supplies (& amount needed)	Area	Location

**Detailed Expenses.** *List every item purchased for the event.*

Budget Number	Vendor	Description	Total

**Notes.** *List hints, lessons learned and recommendations received from staff feedback and evaluation for future events for all areas of the event.*

Area	Note

### Attach

- Final Budget
- Attendance report, if required (e.g., Day Camp)
- Registration forms and Fliers
- Maps and handouts
- Staff meeting agendas and minutes



# Event Budget

Appendix B

Form is available at [www.shac.org/district\\_operation#activities](http://www.shac.org/district_operation#activities)

\_\_\_\_\_ District \_\_\_\_\_ Event Activity Date: \_\_\_\_\_

**Revenue**

				_____ Actual	_____ Budget	_____ Actual
6801		20	Activity Fees	\$	\$	\$
6806		20	Concession (Trading Post)	\$	\$	\$
<b>Total Revenue</b>				<b>\$</b>	<b>\$</b>	<b>\$</b>

**Expense**

8010		20	Other Professional Fees	\$	\$	\$
8101		20	Medical/Health/Safety (Security)	\$	\$	\$
8103		20	Program Supplies (Patches, T-shirts)	\$	\$	\$
8104		20	Food & Commissary	\$	\$	\$
8105		20	Sanitation & Janitorial	\$	\$	\$
8106		20	Office Supplies	\$	\$	\$
8107		20	Audiovisual	\$	\$	\$
8108		20	Catering Expense	\$	\$	\$
8201		20	Telephone	\$	\$	\$
8301		20	Postage/Shipping	\$	\$	\$
8402		20	Site or Facilities Rental (Camping Fee)	\$	\$	\$
8405		20	Electricity	\$	\$	\$
8406		20	Gas (Propane)	\$	\$	\$
8408		20	Water/Sewer	\$	\$	\$
8413		20	Building and Maintenance	\$	\$	\$
8501		20	Equipment Rental (Port-o-Cans)	\$	\$	\$
8507		20	Equipment Service Contracts	\$	\$	\$
8521		20	New Equipment Purchase Non Deprec.	\$	\$	\$
8601		20	Printing – in-House	\$	\$	\$
8609		20	Outside Printing	\$	\$	\$
8702		20	Gas & Oil	\$	\$	\$
8703		20	Repairs-Vehicles	\$	\$	\$
8711		20	Transportation Fares	\$	\$	\$
8832		20	Conference Expenses	\$	\$	\$
8901		20	Assistance to Individuals – BSA Registration	\$	\$	\$
8910		20	Assistance to Individuals – Camperships	\$	\$	\$
9151		20	Recognition Awards –Staff	\$	\$	\$
9152		20	Recognition Awards – Volunteers	\$	\$	\$
9153		20	Recognition Awards – Youth	\$	\$	\$
9322		20	Accident Insurance	\$	\$	\$
9412		20	Licenses & Permits	\$	\$	\$
9431		20	Administrative Fee (20%)	\$	\$	\$
<b>Total Expenses</b>				<b>\$</b>	<b>\$</b>	<b>\$</b>

<b>EXCESS REVENUE OVER EXPENSE</b>				<b>\$</b>	<b>\$</b>	<b>\$</b>
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# Sample Posted Detail Listing Report

Appendix C

*District Executives can request this report from Accounting*

Date:12/05/2011 Time:09:44:40

Sam Houston Area Council #576  
 POSTED DETAIL LISTING

Page 0001

Include accounts with no activity? N  
 Sources: All

-----  
 From Accounting Period 1 Beginning 1/01/2011 Thru Accounting Period 11 Ending 11/30/2011  
 For Cost Center 546 Thru 546

Account-#	Description	Beginning Balance	Debit	Credit	End Balance
1-6801-123-20 ACT-FEES	31 Utopia/CUB DAY CAMP	.00			
4/07/2011	4-2011 TP 116248 \$576			1,315.00	
4/25/2011	4-2011 TP 117320 \$576			55.00	
4/25/2011	4-2011 TP 117321 \$576			65.00	
5/06/2011	5-2011 TP 118324 \$576			9,320.00	
6/03/2011	6-2011 TP 119722 \$576			770.00	
6/07/2011	6-2011 AP PYLE060611 06/07/2011 Powell, Baden		41.25		
6/13/2011	6-2011 TP 120091 \$576			265.00	
6/24/2011	6-2011 TP 120601 \$576			210.00	
6/27/2011	6-2011 TP 120639 \$576			196.00	
					-12,154.75
1-8103-546-20 PROGRAM SUPPLIES	31 Utopia/CUB DAY CAMP	.00			
6/14/2011	6-2011 AP 1889237 06/14/2011 CHAMPION ICE		350.00		
6/16/2011	6-2011 AP 6975287 06/16/2011 S & S WORLDWIDE INC		1,540.17		
6/21/2011	6-2011 AP JRICE061511 06/21/2011 West, James		8.11		
6/28/2011	6-2011 AP 10914 06/28/2011 PAUL'S SUPPLIES, INC		632.01		
6/28/2011	6-2011 AP DSTRA062711 06/28/2011 Montgomery, Phillip		69.37		
6/28/2011	6-2011 AP DUNBA062711 06/28/2011 Edson, Carol		31.93		
7/31/2011	7-2011 GJ JE 58 T-SHIRTS FOR CDC		1,963.68		

SAMPLE

Revenue: TP \$576 = income turned in "over the counter"  
 GJ = General Journal (income through Double Knot)  
 Expenses: AP = Accounts Payable  
 GJ = General Journal (e.g., journal entry for patches and t-shirts purchased by council for Day Camp)



# Sample Statement of Activity Operations report

Appendix D

*District Executives can request this report from Accounting*

Date:12/05/2011 Time:09:36:49

Sam Houston Area Council

#576

Page 0001

Statement of Activity Operations  
 Individual Event Format  
 Through Accounting Period 11 to Date 11/30/2011

Activity: 123 31 Utopia/CUB DAY CAMP

Staff Advisor: Samantha Houston

Volunteer Chairman: James West

Activity is over on 07/01/2011  
 Status: Non-Deferred

Description	Operating Fund Fund #1			Year to Date			Current Yr. Budget
	Current Period Budget	Current Period Actual	Current Period Variance	Year to Date Budget	Year to Date Actual	Year to Date Variance	
<b>Revenue</b>							
6801 ACT-FEES				12,000	12,155	155	12,000
Total Revenue				12,000	12,155	155	12,000
<b>Expenses</b>							
8101 MEDICAL, HEALTH & SAFETY SUPPL		25	-25				25
8103 PROGRAM SUPPLIES		7,500	-156	7,500	7,344		7,500
8104 FOOD & COMMISSARY SUPPLIES		123	46		169		123
8105 SANITATION & JANITORIAL SUPPLI		350	193		543		350
8106 OFFICE SUPPLIES		50	58		108		50
8301 POSTAGE		50	-50				50
8402 SITE OR FACILITIES RENTAL		700	-700				700
8601 PRINTING INHOUSE		100	17		117		100
8609 OUTSIDE PRINTING			66		66		
8832 CONFERENCE EXPENSES-REGIONAL		300	-300				300
9152 RECOG AWRDS-VOLUNTEERS		300	-300				300
9153 RECOG AWRDS-YOUTH MEMBERS		50	90		140		50
9412 LICENSES & PERMITS-NON-OCCUPAN		52	32		84		52
9431 OTHER EXPENSES		2,400	31		2,431		2,400
Total Expenses		12,000	-997		11,003		12,000
Excess (Deficit) of Revenue Over Expenses					1,152	1,152	

SAMPLE

-- End of report --





# Check Request

Appendix F

Fund: \_\_\_\_\_

Date: \_\_\_\_\_

Bank: \_\_\_\_\_

Due Date: \_\_\_\_\_

*To request reimbursement: Complete this section, attach the receipt(s), and submit this form to the District Executive.*

Make check payable to: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

\_\_\_\_\_  
Vendor No.

Amount of check: \_\_\_\_\_

Mail  Give check to: \_\_\_\_\_

Explanation: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Account Number

Amount

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Request by: \_\_\_\_\_

Approved by: \_\_\_\_\_

District Executive

Field Director



## Vendor Letter

Appendix G

November, 2011

Dear Valued Vendor,

The Sam Houston Area Council Boy Scouts of America (the Council) appreciates the relationship we have with you, our vendor. We continually strive to improve our processes and conduct business in the most ethical manner.

In an effort to streamline processing and payment of invoices, we would like to take this opportunity to inform you of our invoice requirements. Your compliance with these requirements can significantly reduce the time required to process and pay invoices received from your company resulting in you receiving your payment more quickly.

**INVOICING** - Invoices for goods and services billed to the Council must contain, at a minimum, all six of the following:

1. Legal name of vendor and D/B/A name of vendor, if applicable
2. Vendor address and phone number
3. Invoice date
4. Invoice number
5. Purchase order number (issued by the Council)
6. Quantity, description and price of goods or services provided

We encourage you to take appropriate action to ensure your invoices meet or exceed these requirements. Invoices received that do not satisfy the above minimum requirements may be returned to you for correction, which could delay processing and payment of the invoice.

**PURCHASE ORDER** - The Council uses a pre-numbered purchase order system. When accepting an order from a Council representative, please request a copy of the purchase order or purchase order number from the purchasing representative to satisfy the requirement of item number 5 above.

**DELIVERY OF INVOICES** - Please mail all invoices to the post office box listed below. If you prefer, invoices can be emailed to [ap@shac.org](mailto:ap@shac.org). Please do *not* email invoices to the purchasing representative or mail invoices to any other address.

Thank you for your cooperation. Please feel free to contact me directly at 713-756-3367 if you have any questions or concerns about our invoicing requirements or ever need assistance with invoice resolution.

Sincerely,

Doug Davis  
Controller

SAM HOUSTON AREA COUNCIL  
BOY SCOUTS OF AMERICA  
2225 North Loop West  
P.O. Box 924528, Houston, Texas 77292-4528  
713-659-8111 • [www.samhoustonbsa.org](http://www.samhoustonbsa.org)



# District Event Work Plan

Appendix H

Monthly report for District Committee meetings. Form is available at [www.shac.org/district\\_operation#activities](http://www.shac.org/district_operation#activities)

## Upcoming District events.

Event _____	Date _____	Location _____
# Pre-registered _____	Units Participating _____	
<b>✓ if complete</b>		<b>Notes</b>
<input type="checkbox"/> Event Chair recruited	- 9 months	_____
<input type="checkbox"/> Facility reserved	- 9 months	_____
<input type="checkbox"/> Key Staff recruited	- 8 months	_____
<input type="checkbox"/> Staff meetings scheduled	- 5 months	_____
<input type="checkbox"/> Event Promoted, monthly	- 4 months	_____
<input type="checkbox"/> Theme selected	- 4 months	_____
<input type="checkbox"/> Program planned	- 4 months	_____
<input type="checkbox"/> Volunteers/units recruited	- 4 months	_____
<input type="checkbox"/> Health/Safety officer requested	- 4 months	_____
<input type="checkbox"/> Registration form completed	- 4 months	_____
<input type="checkbox"/> Quartermaster list submitted	- 3 months	_____
<input type="checkbox"/> Art work designed for t-shirts/patches	- 3 months	_____
<input type="checkbox"/> Bids requested (patches, t-shirts, awards)	- 3 months	_____
<input type="checkbox"/> Materials/patches ordered	- 3 months	_____
<input type="checkbox"/> Facility arranged (water, sanitation, permits)	- 2 months	_____
<input type="checkbox"/> T-shirts/awards ordered	- 1 month	_____
<input type="checkbox"/> Volunteer meeting held	- 1 month	_____
<input type="checkbox"/> All receipts and PO's submitted to District Executive	+ 2 weeks	_____
<input type="checkbox"/> Budget closeout meeting with District Executive (required)	+ 2 weeks	_____
<input type="checkbox"/>		_____
<input type="checkbox"/>		_____
Notes/Action Items		



## District Day Camp Work Plan

Appendix I

*Monthly report for District Committee meetings. Form is available at [www.shac.org/district\\_operation#activities](http://www.shac.org/district_operation#activities)*

### Upcoming District event – Day Camp

<b>Event</b> _____	<b>Dates</b> _____	<b>Location</b> _____
Theme _____		
# Pre-registered _____		
Packs Participating _____		
<input type="checkbox"/> Yes <input type="checkbox"/> No Camp was promoted last month (describe): _____ <input type="checkbox"/> Yes <input type="checkbox"/> No Camp will be promoted next month (describe): _____ <input type="checkbox"/> Yes <input type="checkbox"/> No _____ attended Council Day Camp meeting last month? <input type="checkbox"/> Yes <input type="checkbox"/> No _____ is attending next month?		
<b>✓ if complete</b>	<b>Notes</b>	
<input type="checkbox"/> Recruit Camp Director & Program Director(s)	July	_____
<input type="checkbox"/> Select and reserve facility	Aug	_____
<input type="checkbox"/> Finalize Budget	Aug	_____
<input type="checkbox"/> Recruit Key Staff	Nov	_____
<input type="checkbox"/> Review detailed budget with Key Staff	Nov	_____
<input type="checkbox"/> Director/Program Director attend camp school	Nov	_____
<input type="checkbox"/> Schedule all Key Staff meetings	Dec	_____
<input type="checkbox"/> Complete registration form /place on website	Dec	_____
<input type="checkbox"/> Submit Quartermaster request list	Jan	_____
<input type="checkbox"/> Plan program details	Feb	_____
<input type="checkbox"/> Request bids (supplies / gifts / port-a-potties)	Feb	_____
<input type="checkbox"/> Submit initial t-shirt/patch order	Mar	_____
<input type="checkbox"/> Request Day Camp license	Mar	_____
<input type="checkbox"/> Order supplies (crafts / gifts / port-a-potties)	Mar	_____
<input type="checkbox"/> Begin registration	Mar	_____
<input type="checkbox"/> Arrange facilities (water, sanitation, permits)	Apr	_____
<input type="checkbox"/> Request letters (hospital-ambulance, police, fire)	Apr	_____
<input type="checkbox"/> Recruit volunteers	Apr	_____
<input type="checkbox"/> Finalize schedule / map of events	Apr	_____
<input type="checkbox"/> Finalize volunteer training manual	Apr	_____
<input type="checkbox"/> Conduct pre-camp site visit	Apr	_____
<input type="checkbox"/> Order Trading Post items, if applicable	May	_____
<input type="checkbox"/> Conduct volunteer meeting	May	_____
<input type="checkbox"/> Conduct sex offender database checks	May	_____
<input type="checkbox"/> Place final t-shirt/patch order	May	_____
<input type="checkbox"/> Finalize Day Camp standard book	May	_____
<input type="checkbox"/> Pick up patches and t-shirts	June	_____
<input type="checkbox"/> Meet with Key staff to review evals/critique	+ 1 week	_____
<input type="checkbox"/> Submit all receipts/PO's/final budget to District Executive	+ 2 weeks	_____
<input type="checkbox"/> Hold Event Close Out Meeting w/District Executive (required)	+ 2 weeks	_____
Notes/Action Items		



# Quartermaster Request

Appendix J

District \_\_\_\_\_ Event Date: \_\_\_\_\_ Location: \_\_\_\_\_ # scouts expected: \_\_\_\_\_

Event Chair: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

District Executive: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

District QM: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Rangemaster\*: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

\_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

*Form due to the Division Quartermaster 30 days before an event.*

Quantity Requested	Notes	# checked out	# returned
<b>Shooting Sports</b> *Requires certified Rangemaster			
_____	# BB Gun Stations on Range		
_____	# Archery Stations on Range		
_____	# Archery Targets		
_____	# Wrist Rocket Stations on Range		
_____	Barricade Fencing – specify length		
_____	_____		
<b>Crafts</b> (not consumable)			
_____	Coping Saws		
_____	Goggles/Protective Eye Wear		
_____	Hammers		
_____	Mallets		
_____	Screw Drivers – Flat head		
_____	Screw Drivers – Phillips		
_____	Staple Guns		
_____	_____		
<b>Electronics</b>			
_____	_____		
<b>Sports</b>			
_____	Badminton birdies		
_____	Badminton nets		
_____	Badminton rackets		
_____	Cones – sports sized (~5")		
_____	Flag football belts (2 colors)		
_____	Footballs		
_____	Frisbees		
_____	Golf balls		
_____	Golf putters		



District \_\_\_\_\_

Quantity  
Requested

Notes

# checked  
out      #  
returned

**Sports, continued**

_____	Horseshoe sets			
_____	Kick balls			
_____	Kickball bases			
_____	Marking wand (to mark fields)			
_____	Soccer balls			
_____	Stop watches			
_____	Volleyball net			
_____	Volleyballs			
_____	_____			
_____	_____			

_____	Canopies - Pop Up – 10’ x 10’			
_____	Canopies – large – 10’ x 20’			
_____	Cots (for Health/Safety)			
_____	Extension cord: 100 feet			
_____	Extension cord: 25 feet			
_____	Extension cord: 50 feet			
_____	Fire Extinguisher			
_____	Garden Cart (for hauling equipment)			
_____	Ice Chest/Cooler – specify size			
_____	Megaphone/Bullhorn			
_____	Post setters/driver			
_____	Safety vests			
_____	Tables – specify size			
_____	Tables – specify size			
_____	Tarps – specify size			
_____	Traffic Cones - lg (~28”)			
_____	Traffic Cones - sm (~18”)			
_____	Trash Cans - specify			
_____	Walkie Talkies			
_____	Water Coolers – 10 gallon			
_____	Water Coolers – 5 gallon			
_____	_____			
_____	_____			

Additional Requests



## **Key Leader's Conference 2012**

**Harry Drew**  
**Council Activities Chair**  
**713-294-7849**  
**harrydrew@earthlink.net**

**Leslie Melton**  
**Council Day Camp Chair**  
**832-419-4970**  
**leslie.melton@sbcglobal.net**

**Darlene Scheffler**  
**Council Quartermaster**  
**832-788-3520**  
**djstokes@earthlink.net**