

PIEDMONT DISTRICT EVENT PLANNING GUIDE

18 November 2012

Policy Statement

This document presents a general approach for planning District activities including adult/scouter training events; camp-o-rees are addressed separately. It is the District's responsibility to hold annual events to enhance the Scouting Program, paramount to this process are careful planning and coordination. No event shall be promoted without prior district approval and without at least two leaders, the primary and a backup leader. Events on the District Calendar are considered approved but the planning is still a critical part of the final approval process.

Budget Planning

It is critical in planning to adequately estimate and budget the activity. Advanced planning and surveys of potential unit participation is crucial in this endeavor. Plan on canvassing units about six months in advance about their interest in the event and use past history and expense records to form a budget. Once a rough budget is formed, review with District and again assess unit participation; there is no point in holding an event if it is too expensive or "hoping for unit participation."

District has no funds other than what Council may provide via the District Executive. Careful planning of expenditures is required especially if having to make deposits to reserve sites, equipment, and facility rentals including portable toilets. A purchase order may be generated where billings go directly to council but this needs advanced planning and the provider of services agreeing to the arrangements as noted below. You must get any agreements, services or quotations in writing.

Council has imposed the requirement that three quotations be submitted for all goods and services exclusive of the venue. By direction, one quotation must be from the Scout Shop for goods and services that can normally be purchased there.

Purchase Orders

If an event expense requires a purchase order (i.e. the invoice will be sent directly to council by the vendor), the purchase order request, along with a price quote from the vendor, must be submitted to the District Executive two weeks prior to the placement of the order with the vendor. The purchase order will then be reviewed and approved by the Council Cabinet. Only after this purchase order is approved should the order be placed with the vendor.

Check Requests (reimbursements)

A volunteer may, out of his or her own funds, make a purchase for a Scouting event with the intent of receiving reimbursement. This expense will be reimbursed to the volunteer after the close of the event, provided the following three criteria are met: 1) the expense was indicated on the event budget and approved, 2) any budgeted expense over \$100 has received a separate, supplemental approval by the council cabinet (submit these approval request through the District Executive), and 3) the expense is not for printing of flyers, handouts, registration forms, etc., which could have been printed at the Council office.

Budget Spreadsheet

A detailed budgeting worksheet is a valuable method for planning expenses and expected revenues and acts as a checklist for necessary and planned resources; a copy of the spreadsheet format is attached followed by a traditional event budget. The detailed budget expense categories are entered on the spreadsheet. It is important to be as detailed as possible in listing expenses; the budget worksheet allows inserting line items.

Council Expense Report

All budget and expense reports submitted to council must now use the council's expense reporting form; same format as spreadsheet. It is suggested to develop a detailed accounting form as noted above and then summarize the budget/expense line items onto the council form and attach the detailed budget. This way, if there are any questions, the information is attached. Be sure to keep copies as this record along with the event report will form a permanent record of the district event for future use and planning. And expense reports have been lost at council.

All event budgets require review and approvals by V.C. Programs, district chairperson and the DE.

Council Fees

NCAC imposes two fees. There is \$1 per day per person liability fee. A weekend event (Friday PM to Sunday AM) counts as two days thus a \$2 fee per attendee is required. In the event scouts or units leave during the course of the event, be sure to properly account for the reduced numbers. NCAC also imposes a 10% gross revenue fee as well. Be sure to include these fees in your budget planning and check the NCAC website for any policy changes prior to planning.

Activity Fees

We want to make events as inexpensive as possible but as noted, we have no funding to cover cost overruns thus some conservatism is required, otherwise reimbursements for expenses may not cover out-of-pocket expenditures. The ten percent council fee is to cover expense overruns.

Planning

An Event Chairperson will be appointed and the event team should consist of at least two or more scouters or adults. The purpose is to have depth in case someone cannot make the event. Recruit scouters as needed to fill functions and other needs as required for the successful execution of the program. A well planned event with detailed "job" descriptions or responsibilities is valuable and can be used for future events.

- a. Select a two or three member team six to nine months in advance of the event and establish or note the planned date. This gives the team members time to review past events, share ideas and prepare. The team needs to report monthly to the district committee regarding their progress.
- b. Six to four months from the event date develop the theme with a general outline of activities. The outline will help in identifying program events and support staff. The Health and Safety committee is charged in reviewing the program and approving the

location so plan ahead. Upon approval, make reservations if required. It is absolutely critical to understand the facility costs for budgeting.

- c. Four to three months from the event present the budget, theme and program outline for District approval. Have a budget prepared based on the expected attendance and the minimum attendance required as the breakeven point. All budgets need to be finalized two months prior to the event. An example budget is attached and illustrates the importance of determining a minimum attendance to break even with expenditures.
- d. Two program plans are required to be developed, the public program “A” to be released to units and the detailed program “B” that describes the execution of the event by the staff, the logistics, key assignments, checklists, and staffing. Why the details? In the unexpected event key organizers or staffers cannot make the event, their roles can be easily filled having this information. Also of critical importance is to list all rules and restriction that the venue may have in the program.
- e. *Health and Safety* committee will review the detailed program and provide final approvals to proceed. This should occur two months prior to the event.
- f. Announce the program at Round Table three months prior to the event and ask units to confirm attendance with estimated numbers. An example form is attached.
- g. Continue to develop the program and activities portion and identify awards and how scouts are to be ranked and awarded.
- h. Formally release the program at Round Table two months prior to the event and have it posted on the district website. Be sure the unit registration form is included.
- i. Have a backup plan. It is important to consider weather or other conditions that could impact the event including loss of venue. Establish a criterion for deciding to implement an alternate program or to cancel or postpone the event. All registrations need to have a contact person so information can be disseminated. It is always better to err on the side of safety.

Health and Safety

The Health & Safety (H&S) committee will provide an independent team that has the authority to oversee events to ensure BSA and Council policy is followed. H&S team has the right to terminate or curtail any activity deemed unsafe.

Injury and Incident Reporting

NCAC requires any injury or incident be reported. The Incident Information Report form is NCAC No. 680-016 and is included to show the information necessary to be recorded. The actual form is downloaded from NCAC and is completed by filling in the form via computer. To access the form go the NCAC website and enter “Injury Report” in the search window. Minor injuries that do not require professional services need not be reported to council.

Registration

Registration will generally be by email with units posting payments or turning in payments at the Round Table prior to the event. All payments go to council but may be held by the staff registrar or DE as directed. In the event a unit must cancel, a refund may be possible provided there is a budget surplus and the unit has an acceptable reason for not attending, (family or medical emergency, traffic accident, etc.). Unit must formally request a refund with reason.

Preparations and Execution

Site preparations include performing a walk through, determining setups, and where events will be held. Careful planning of traffic control and parking is very important that may require additional staff.

Make sure to have adequate staffing for the events and any preparations that need to be accomplished prior to the event kick-off. Recruit scouters from other units as needed.

Have a check-in location that is clearly identified and provide each unit leader a “check-in package” with event information, schedule, venue rules/restrictions, and what to do in an emergency; for instance, in the event a fire alarm sounds identify a rally point. Also identify the First Aid responder or have emergency care arrangements posted. Provide directions to the nearest emergency facility and contact phone numbers as part of the check-in package.

Conclusion and Report

The event chairperson shall prepare a report summarizing the activities and shall make note of any incidents or injuries that may have occurred and identify those involved. The report shall list key event organizers, the units attending, and the attendance numbers (scouts and scouters). The report will include a financial summary of revenues and expenses; the expense report submitted to council must use the council’s form. All receipts shall be turned-in and persons identified for reimbursement.

Incident Information Report

(Events or allegations of injury, illness, or property damage including employment and directors and officers issues)

Witnesses

Name: _____
 First Middle Last
Address: _____
 City State Zip
Home phone: _____ Cell phone: _____ Work phone: _____

Others

Name: _____
 First Middle Last
Address: _____
 City State Zip
Home phone: _____ Cell phone: _____ Work phone: _____

Property Damage (if applicable)

Property or vehicle make/model/year: _____
Color: _____ License plate No.: _____

Driver Contact Information (if applicable)

Name: _____
 First Middle Last
Address: _____
 City State Zip
Home phone: _____ Cell phone: _____ Work phone: _____
Passengers: _____ Contact Information: _____

Additional Information:

Information gathered at scene by: _____
Contact Information: _____

Return this completed form to your council's designated user for entry into RiskConsole via MyBSA Incident Entry.

680-016
2010 Printing

**National Capital Area Council - Boy Scouts of America
Piedmont Activity Budget Planning Report**

Event Planning

Name of Event		Event From:	
District	Piedmont (#33)	Dates To:	
Event Fee (per attendee)	\$8.00	Event Length (days)	2

Have you checked the calendar for conflicts or other events that could affect attendance?

Event Fee Development

Planned number of attendees:	180	Fee Rate	100.0%	Net Income	\$1,440.00	Enter No. of Attendees	
Estimated percentage paying 100%	100.0%	100.0%		\$1,440.00		Full fee (100%)	
Estimated percentage paying 1/2 fee	0.0%	50.0%		\$0.00		One Brother = 1/2 fee	
Estimated percentage paying 1/4 fee	0.0%	25.0%		\$0.00		Additional Brothers = 1/4 fee	
Estimated percentage Camperships	0.0%	0.0%		\$0.00		No Fee	
		Total =		\$1,440.00			

Change the Event Fee above to adjust the Total Receipt Line. Adjust percentages as needed.

Event Income (all sources):

	Last Year Actual	Planned	Actual
Number of Attendees		180	
6801 Activity Fees		1,440.00	
6806 Concession Revenue			
List Other Income			
List Other Income			
(A) TOTAL REVENUE	\$0.00	\$1,440.00	\$0.00

Planned Expenses:

Facility & Equipment Usage

8402 Site/Facility Rental			
8501 Equipment Rental			
8104 Food (not catered)			
8108 Food (catered)			
List Item			
List Item			
List Item			
Subtotal	\$0.00	\$0.00	\$0.00

Medical/Health/Safety

8101 Medical/Health/Safety			
8105 Sanitation			
List Item			
List Item			
Subtotal	\$0.00	\$0.00	\$0.00

Event Planning & Development

8601 In-house Printing			
8609 Outside Printing			
8103 Program Supplies			
8106 Office Supplies			
8201 Telephone			
8301 Postage			
List Item			
List Item			
Subtotal	\$0.00	\$0.00	\$0.00

Recognitions & Awards

9152 Adult Volunteers			
9153 Youth Awards			
Unit Recognitions			
Patches & Ribbons			
List Item			
List Item			
Subtotal	\$0.00	\$0.00	\$0.00

Council Fees

9315 Liability Recovery*	0.00	360.00	0.00
10% Council Support Fee**	0.00	144.00	0.00

(B) TOTAL EXPENSES	\$0.00	\$504.00	\$0.00
(C)=(A-B) NET INCOME (DEFICIT)	\$0.00	\$936.00	\$0.00

Review & Approvals

Budget Planning Review	Event Closeout Review & Approval
Prepared By - Event Chairperson / Date	Reviewed By - VC Programs / Date
Reviewed By - VC Programs / Date	Approved By - District Chair / Date
Approved By - District Chairperson / Date	Accepted By - Dist Exec / Date

* Liability Recovery: \$1 per day per youth & adult registrant (Fri-Sun activities are \$2 per registrant for the weekend)

** Council Support Fee: 10% of total revenue

EXAMPLE BUDGET SUBMITTAL
Piedmont MBM Budgetary Plan and Anticipated Expenses

The following budget is submitted for the Piedmont District's March 24, 2012 MBM:

Income:

Expected enrollment: 300 scouts @ \$5/ea: \$1500.00
(Enrollment based on history of attendance)

Expenses:

Council Activity Fee 10% \$ 150.00

Council Insurance Fee \$1/participant \$ 300.00

Culpeper Middle School fee \$ 600.00

Thank you lunch for 25 counselors \$ 100.00

Operating and consumables expenses

Ink and Paper (class material) \$ 60.00

One pack of Blue Cards: \$ 6.75

Four Dozen Totin Chip cards \$ 6.75

Total Expenses: \$1248.50

Balance: \$ 251.50

Health and Safety plan is in place with designated responders.

Last year's attendance was 360 scouts but the budget is based on a worse case basis. Historically, attendance has been approximately 275-350 scouts. Ten percent fee covers any modest drop in attendance.

This budgetary submittal does not reflect any other programs that are offered in conjunction with the MBM; those programs will submit budgets and reports independently.

Submitted this date: 10 Jan 2012

Elden Ray, Event Chairperson
Piedmont District