

Event Planning Guide

Planning is the key to any successful event, from a Wolf den meeting to a national Jamboree. Never forget that old adage of the 6 P's: **Proper Prior Planning Prevents Poor Performance**. Below you will find a list of the many things that need to be considered when planning an activity. Don't assume that this list covers every eventuality, every event and location offers its own challenges and dangers.

6 to 12 Months in Advance

- **What is the event going to be** – Sounds simple but important. For example, is your campout going to be just Webelos or all Cubs in the pack. If the district camporee is going to have a water-sports theme, then it must be near water and lifeguards will be needed. A troop weekend outing with river canoeing means that Webelos cannot be invited. They can only canoe on flat water (lakes, ponds).
- **Who will be participating** – A pack event should include activities for all age groups. For a camporee, do you want to invite Venturers? If so, then you must consider the fact that young ladies will probably be involved.
- **Date** – you should set the date for an event at least 6 months in advance. For district or council events, it should be even earlier. Many troops and packs plan their program calendars a year in advance. If you schedule something when they already have plans, you will lose their participation. Don't forget to check other conflicts such as school dates and holidays. If you plan on using a park or even Camp Coker, their facilities and equipment are leased on a first come, first served basis.
- **Announcement** – Let people know what you are doing so they can write it into their calendars early.
- **Reserve location** – Make sure you have the right location and reserve it early. Consider the following: does it have the facilities for the activities planned, is it in a safe location for Scouts (not near a busy highway, swamp full of mosquitoes, etc), does it have adequate bathroom facilities and fresh water, is a quiet place for sleeping and to enjoy nature (not in the partying section of the campgrounds or near a 24 hour shopping center). Most locations are reserved on a first come, first served basis. Don't let someone beat you to it. Ask for written confirmation of your reservation.

6 to 9 Months in Advance

- **Recruit help** – Don't try to do everything yourself. Put together a committee or team of volunteers who will share the workload. The more people there are, the less each one has to do.
- **Plan activities** – Decide now what you want to do at the event. This will help you determine if you need to recruit more help for the day of the event and if you need people with special skills (i.e. shooting sports director, lifeguard). You may also need to find

special equipment or supplies that will need to be ordered. Don't forget inclement weather. What will you do if it rains?

- **Develop a budget** – When you know what you are doing, you can now begin to determine the costs. Cost that should be considered are:
 - *food
 - *paying for specially trained people
 - *camp or park usage fees
 - *event patches or T-shirts
 - *recognition items and awards
 - *portable toilet rental
 - *a 10% to 15% contingent fee to cover unexpected expenses (they always pop up)
 - *program supplies and equipment
 - *transportation costs
 - *extra insurance
 - *administrative costs (mailings, copying)
 - *entry fees to private events or facilities
- Once you have the total, divide that amount by the estimated number of paying participants (be honest) to calculate how much each person needs to pay. People will want to know this. Also it will help you decide if you will have to cut back somewhere. If the cost is too high, you may have a hard time getting people to attend. A council budget form and instructions are attached. This form can be used for unit events but it does not require council approval.
- **Check on support services** – Where is the nearest hospital, where is the nearest shelter in case of severe weather, is there cell phone coverage in case an ambulance, police, or fire service call must be placed.
 - **Marketing** – Start putting the word out through roundtables and council newsletters for council and district events. For unit events, use unit newsletters, e-mails, and word of mouth.

3 Months in Advance

- **Mailing** – Now is the time to send a detailed mailing to unit leaders for a council or district event, or to families for a unit event. The mailing must include:
 - *dates
 - *location with directions
 - *cost
 - *medical questionnaire if needed
 - *equipment/supplies to be brought
 - *if extra cash must be brought
 - *contact person with phone number and email address
 - *if units will be participating in a campfire program
 - *a registration form
 - ***pre-registration deadline (mandatory for council and district events; critical for planning and supply purchasing)**
 - *where to send registration forms and money (send to council service center for all council and district events; payment should be required with registration)
 - *refund policy if someone doesn't attend
 - *if camping, will fires be allowed and will firewood be available
 - *check-in and departure times
 - *who can attend
 - *agenda/schedule
 - *activities planned
 - *meals that will be provided
 - *permission slips if needed

*leadership policy, is a certain number of adults required to attend with each unit or family?

*rules such as: no alcohol, drugs, smoking, or gambling, buddy system in affect at all times, no vehicles to be driven into camp, no tag-a-long siblings

- **Registration Form** – A registration form should go out with the mailing. For an event where participants will register as a group (district or council events), the form should at least ask for a count of attendees. In many cases asking for a list of attendees is preferable. This will encourage unit leaders to work with families to get firm commitments. **Requiring a payment with the registration and giving a deadline for registration is critical, otherwise you will not have accurate attendance numbers for purchases and budgeting.** The registration form should include:

*name	*address
*phone	*email address
*number of people and/or names	*amount of payment enclosed
*registration deadline date	*name and date of the event
*unit type and number (for council and district events)	
*where to mail the form and payment (always the council service center for council and district events)	

- **Marketing** - Keep putting the word out through roundtables and council newsletters for council and district events. For unit events, use unit newsletters, e-mails, and word of mouth.

2 Months in Advance

- **Visit site** – Verify that the facilities can accommodate the planned activities. Layout where activities and campsites will be set-up. Ensure adequate bathroom facilities are available. Do you need to rent portable toilets?
- **Order patches and/or T-shirts** - For council or district events, orders must go through the council service center so work with the event's staff advisor. The normal turn-around time for custom patches is 6 weeks.
- **Develop a shopping list** – Make a list of supplies and food that will be needed. Items that must be ordered in advance should be ordered now. For items that can be purchased locally, wait until after the pre-registration deadline to purchase these items. That will eliminate buying too much or too little and wasting money.
- **Confirm staffing** – Confirm how many helpers are needed and that they are recruited. Contact them again to be sure they are still willing to help.
- **Confirm location** – Make sure you are still on the books to use the facilities.
- **Marketing** – Start calling unit leaders or families to find out if they are attending. If not, find out why and see if a solution can be found. Don't assume that people are coming. Keep putting the word out through roundtables and council newsletters for council and district events. For unit events, use unit newsletters, e-mails, and word of mouth.

- Submit Event Information Sheet to the Service Center (council and district events)

1 Month in Advance

- **Verify who is bringing what** – Make lists of what everyone is bringing. You don't want to arrive at a camporee and find out that no one brought the firewood for the campfire program.
- **Verify assignments** – Make sure that everyone knows their job. Things to consider: who will handle check-in, who will assign campsites, who will collect permission slips or health forms, who will talk during the leaders meeting that first evening, who will lead the flag ceremony in the morning, who is organizing the campfire program, who will handle medical emergencies, who is checking campsites on Sunday before everyone leaves, who do people go to with complaints or problems.
- **Petty cash** – Bring extra cash to cover unexpected expenses. For council or district events, submit a check request for petty cash from the council service center.

After Pre-Registration Deadline

- **Purchase supplies** – Buy the rest of what you will need now that you have a count of attendees. Wait until a day or two before to purchase perishables.
- **Printing** – Print schedules, maps, and other forms that will be needed at the event.

1-2 Day Before the Event

- **Check-in supplies** – For council and district events, get copies of the registration forms and amounts paid. Also needed at check-in is a receipt book in case someone has money to pay there. Don't forget pens and a calculator.

Day of the Event

- **Arrive early** – Be there early to set-up the check-in station. Everyone must check-in there prior to going to their campsite or to activity areas. Keep an accurate list of everyone attending and where they are camping in case of an emergency or if they need to be found at night. Things to have at the check-in table include:

*copies of all registration forms with amount paid	*pens
*change and money box or bag	*calculator
*copies of daily schedules and maps	*numbered receipt book
*portable radio to track weather	*tablet or note pad
*someone who can answer questions about the event	
- **Collect fees** – If anyone owes money, collect it at check-in and give them a receipt. It will be hard to find them and collect later. After check-in keep any cash in a safe location, such as in a car trunk. For council or district events, turn in any money to the staff advisor. He is bonded (insured) in case it is lost.

Afterward

- **Turn in money and registration list** – For council and district events, all money, receipts, and the list of attendees must be turned over to the staff advisor before leaving at the end of the event. This includes petty cash.
- **Thank you** – Don't forget to thank everyone who helped.
- **After action meeting** – Get the planning committee/staff together afterwards to evaluate how the event went. Be honest. Make notes of what was right and wrong and what to do different next time. Keep these notes for the next planning committee to use.
- **Satisfaction Survey** – Ask some of the participants, youth and adult, how they liked it. Ask for specifics. "It was OK" doesn't help you make it better, but "had a hard time finding parking" helps you decide what needs work.

PEE DEE AREA COUNCIL BUDGETING PROCEDURES

1. All activities will be budgeted to break even.
2. All activities will budget a contingency fee based on 15% of the total expenses. With proper break-even budget planning there runs the infrequent risk of poor attendance or cost over-runs. The contingency item is to cover these possibilities. It should also be noted that not all district activities break even or make money. The contingency fee allows the Council to cover the district activities that run in the red. Also, there is no expense line for items such as secretarial time (i.e. answering phone call questions about the activity, preparing the mailing, receipt of income and paying the bills), District Executive time supporting the activity, or gasoline used during the activity preparation. We do not require activities to budget for these items. Therefore we do plan on activities to make a small profit margin by way of the contingency fee, to help cover these support costs.
3. All income generated from the activities must be booked through the council service center. All expenses must be paid through the council service center. This is the only procedure acceptable, per standard and generally accepted accounting procedures concerning not-for-profit organizations. Our auditors expect us to operate under these procedures at all times.
4. No items should be purchased for the activity until the budget has been approved. Items should be purchased through established vendors of the Pee Dee Area Council and billed to the council service center. Petty cash check requests should be kept to a minimum and arranged at least a month in advance of the activity. These requests should be handled by the District Executive or staff advisor.
5. Volunteers should not purchase items for activities out of pocket. If they do, then a receipt is required for reimbursement. Plan ahead.
6. Approved budgets will be forwarded to the District Executive or staff advisor.
7. The proper method for determining the cost to participants for an activity is to first determine the number of expected participants, second to establish the cost of supplies and expenses, and then divide the total cost (including contingency fee) by the number of participants.

The District Executive or staff advisor is the fiscal manager of the activity. They should leave the activity in possession of all receipts, cash, checks and bills that are available. The professional staff is bonded for this purpose.

