



Dear Scouting Volunteer,

Congratulations!

You have agreed to serve the Scouts and Scouters of Crater Lake Council by providing leadership to a program or activity. This guidebook is designed to help you in the program and budget planning process for council wide and regional events. In addition, this guide will help you understand and follow the financial and operating procedures for Crater Lake Council as well as BSA national policies and procedures. These materials, used with the assistance and advice of your Staff Advisor and council committee volunteers, should make your event smooth, efficient, and enjoyable one. Every form that is mentioned in this guidebook is available on the Council Website.

Thank you for your willingness to serve and best wishes for a safe, fun, and educational program!

Yours in Scouting

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Introduction:

The purpose of this guide is to provide the essential steps and procedures needed to conduct council wide or regional events.

Because Crater Lake Council no longer has district operations, all events are Council events based in a geographical area of the council. All events are open and available to all Scouts and Scouters for participation- given age-appropriate guidelines. Crater Lake Council requires all events using the BSA brand and marketed as a Scouting activity to be listed on the Council Calendar, have online registration and to work collaboratively with the Council Committees. No event will be promoted without prior approval of the appropriate Council Committee. All event chairs/leads are considered members of the Council Service and Activities committee and are expected to regularly attend council committee meetings.

Any event that uses the BSA Brand and is organized as an overnight camping program that is one, two or three nights in length needs to meet the NCAP standards for Short-term events, including training events, work weekends, all Order of the Arrow functions, and supplemental program activities like Camporees, Klondike Derbies and so on.

Remember- Crater Lake Council is led by volunteers, and planning is essential to make sure your event has all necessary approvals required per BSA and Council Policy.

Safety First... Youth Always

Remember, it's about the YOUTH!!! If you are in Scouting for any other reason, you're in it for the wrong reason. Always come back to this core question- "Why am I here?" The YOUTH! Having an attitude of service to the youth and adult members as well as the professional staff will make issues not look too big or seem too important. Ask yourself, "Why do I volunteer?" Be prepared to be the example of the Scout Oath and Scout Law and help others to do the same.

Resources are available to assist you with event planning from the National BSA website at www.scouting.org. Especially useful is the Activities and Civic Service Committee Guide. [Link to the Guide](#)

Crater Lake Council also has committees to assist: Advancement, Service and Activities, Camp Promotions, Training, National Camp Accreditation Program (NCAP), Shooting Sports, Aquatics and High Adventure as well as others. The volunteers on these committees are ready and waiting to provide technical assistance and support.

All events are to be financially self-sustaining. It is vital for the council to demonstrate good business practices by assuring that budgets are well-thought-out, followed, and frequently reviewed during the planning and event execution process.

BSA Standards: For all Council events, the policies of the Boy Scouts of America are followed. [Activity Planning and Risk Assessment | Boy Scouts of America \(scouting.org\)](#) has all the latest standards

Remember, Crater Lake Council has a number of volunteers and volunteer committees to help answer questions and provide guidance.



A SIMPLE 8 STEP PROCESS

Step 1- Goal Setting

For any event to be successful goals need to be established. It is impossible to label an event as successful if you don't define what success is.

ATTENDANCE: Every event should have an attendance goal and target audience. WHO you want to attend is just as important as how many will attend? This will also help to focus your event promotions plan and to help ensure your event meets age-appropriate guidelines as outlined in the Guide to Safe Scouting and other Scouting program materials.

PROGRAM: A program goal can be thought of as the answer to the question- "WHY are we doing this event?" or "WHAT do we want to accomplish with this event?" Program goals help to keep focus on the purpose of the event. A program goal should be S.M.A.R.T.

- Specific
- Measurable
- Attainable
- Realistic
- Timely

Program goals should be limited to three or less. Any more than that and your event will become too complicated and could spread resources too thin. Once you have your program goal(s), you have something to measure all other tasks against.

FINANCIAL: Crater Lake Council requires that all event registrations be through the council's on-line system, Black Pug. All fees will be collected at the time of registration. Pre-registration is strongly encouraged to reduce the burden of paperwork and

collecting funds this allows volunteers to focus on program and not on administration.

It is important that each event with expenses also have an income (fee). A budget worksheet needs to be completed by the volunteer in charge and will need to be reviewed by the appropriate council committee chair or Vice President and approved by the Staff Advisor before the event registration can be opened in Black Pug and promotions start.

Training Events: It is the policy of Crater Lake Council not to charge for in person Position Specific Basic Training, Basic Adult Leader Outdoor Orientation (BALOO), or Introduction to Outdoor Leader Skills (IOLS). When earned, the "trained" patch, training cards, and program training materials needed are provided by the council. The exception is for any food or other program expenses not mentioned above. In these cases, an event fee to cover these expenses should be established with the help of the appropriate committee chair, and/or staff advisor. Council Contingency fees do not apply to training.

Make it SAFE

To ensure the safety of participants, the BSA expects leaders to use the four points of SAFE when delivering the Scouting program.

Supervision- Youth are supervised by qualified and trustworthy adults who set the example for safety

Assessment- Activities are assessed for risks during planning. Leaders have reviewed applicable program guidance or standards and have verified the activity is not prohibited. Risk avoidance or mitigation is incorporated into the activity.



Fitness and Skill- Participants' Annual Health and Medical Records are reviewed, and leaders have confirmed that prerequisite fitness and skill levels exist for participants to take part safely.

Equipment and Environment- Safe and appropriately sized equipment, courses, camps, campsites, trails, or playing fields are used properly. Leaders periodically check gear use and the environment for changing conditions that could affect safety.

Step 2- Logistics

Logistics involve the time, date, and location of an event, as well as the resources needed to support that event. The availability of a location is a factor when scheduling the time and date. Sometimes the time and date are not able to change so a suitable location must be found for that slot. Remember, "the early bird catches the worm."

Some events will need to meet the National Camp Accreditation Program (NCAP) standards and will require additional documentation and assessment. Review the section on NCAP section of this guide for more information.

Location Selection: All activity sites must be approved by the District Executive or Staff Advisor BEFORE any agreement can be made. Once the location is approved the District Executive or Staff Advisor must be the one to sign any contractual agreement that may be required (including camp).

Date: Before scheduling an event look at other calendars, in addition to the Council Calendar. School calendars, community calendar and religious holidays are very important to keep in mind. Don't forget to verify availability of council properties and complete the reservation request to assure the property is available. Use of council

property is on a first come first served basis, and pre approval is required.

Time: Think about how long your event is going to last, and what time is best to start. Allowing travel time is important; give participants enough time to get home from work and change. Specify a start time and end time for each event.

Step 3- Backdating

Back dating is the method used by the Boy Scouts of America to plan and organize events. This method takes the action items that need to be accomplished and places them in a timeline, providing a deadline for each to be completed. This process helps to avoid "missed" promotion opportunities so important to an event's success.

Step 4- Budget

Every event budget must stand alone. In other words, there is no additional funding that comes from the Council to support an event. Income from the event must cover all expenses. Typically, the Staff Advisor serves as the treasurer or finance chair, so, the final budget must be approved by the Staff Advisor before any money can be collected or spent.

Building a budget starts with listing all the items that are needed for that event. A cost of these items is then determined using a conservative figure, one that is high rather than low. Once all expenses are listed, including a 20% Council Contingency Fee, a total for expenses is calculated. An attendance figure is then obtained by taking 85% of the attendance from the previous year to determine the event fee. Overall, a budget is a guide. To ensure financial success it is best to budget high on expenses and low for income.



Crater Lake Council Standard Fees: The following fees will be used to help create your budget

Food:

- \$3 per person per breakfast
- \$4 per person per lunch
- \$5 per person per dinner
- \$2 per person per Cracker Barrell/snack/dessert

Event Patches: \$3 per person per patch, minimum. Some special-order patches may cost more and you budget will need to show the increased cost.

Income: Funds collected from events are to be properly receipted, safeguarded, and reported in a timely manner, as required by National BSA Policy, Crater Lake Council Policy and IRS regulations. Field receipt books are available through the staff advisor.

All income must be submitted to the Council office. For events that have “walk-ins” that pay at the door, the money must be turned over to the Council on the next business day. Income (cash) collected on site during the event cannot be used to pay for expenses. Checks should be made payable to the “Crater Lake Council”. The use of the Blackpug system for walk in registration is highly encouraged.

Donations- Once you have a budget, and a list of expenses, you can seek “in-kind” donations. In-kind donations can provide relief to a budget, and can help to reduce the cost to the participant. Common forms of “in-kind” donations include food items, rooms or locations and port-o-johns. In-kind donations are always be for goods or services, never cash. To reiterate- Cash donations may not be sought or accepted to supplement any event.

Your written budget must include the actual value of the in-kind donation for future reference. Before you approach a business for an in-kind donation, check with the appropriate Council Committee Chair and the staff advisor for approval. Many of our largest companies already donate thousands annually through other channels. For the good of the program, we want to continue this community “good will” and avoid repeated requests for donations for multiple events.

Expenses: There are three ways expenses can be paid

PURCHASE ORDER (PO): A purchase order is simply a form that is used to inform Accounts Payable that an upcoming bill is already approved for payment. This is the preferred method because there is no cash involved. If a company or vendor agrees to bill the Council for the order, use this method.

- Purchase Orders (PO) should be requested 4 weeks prior to ordering or spending council/event funds. By requesting a PO, the council office is made aware of upcoming expenses and provides the opportunity to give prior approval. Please include a quote and/or budget documentation with your PO request.
 - Note- not all PO’s have guaranteed approval- if event funds are tight, the PO may not be approved.
- First- Obtain a quote for the item from the company or vendor
- Second- Request a “PO” number from the Staff Advisor. Please provide the company name, address, quantity of the items, cost of the items and the



total cost of the order when requesting a PO number

- Third- the Staff Advisor secures a PO and gives the number to the volunteer placing the order
- Fourth- the company must reference the PO number on the bill they submit. When Accounts Payable receives the bill it is paid on the net check run. Bills must be received five days before the next check run in order to be processed.

CASH ADVANCE: The Staff Advisor may request a cash advance for an event to pay for items that require cash. Food is the most common expense that requires a cash advance. The cash advance must be requested in enough time to allow for the check to be cut on the standard check run. All cash advances are made out to the Staff Advisor. As the cash is spent, receipts are retained. Receipts totaling the advance are then submitted to the Council.

REIMBURSEMENT: This is the least preferred way to pay for expenses. In this case, a volunteer or professional pays for the expense out of their own "pocket". The expense must be preapproved by the Staff Advisor in order for reimbursement to be made. Receipts are required for all reimbursements. Receipts for the expenses are submitted and a check request is made. Checks for reimbursement follow the same schedule as Purchase Orders (see above). Receipts for reimbursement must be turned in within 30 days after the event is complete.

- Check requests should accompany any invoice that is sent to the council office for payment
- Check requests should include the following information
 - Date & Amount

- Event name, the proper account number and project code that the expense should be charged to
- A current budget should be included, and the expense should be within budgeted amounts
- Any additional information that needs to be included
- Signed by the person requesting (approving the payment)
- Include PO information when applicable
- A copy of the receipt. Copies should be paper clipped, not stapled. **No original receipts**

PETTY CASH:

When needed, an event may request petty cash. Petty cash should be issued and reconciled for each event. Please don't carry it over to another event. Petty cash needs to be used for expenses related to the event it was issued for and NEVER used to reimburse volunteers for expenses. Return all unused petty cash to the Scout Shop along with expense receipts.

- Petty cash check requests should be received in the council office 4 weeks prior to the event using a check request form.
- It is very important to keep petty cash separate from other cash funds such as cash register money or participant food collected at the event.
- Turn in remaining Petty Cash through the Scout Shop and obtain a receipt for the cash turned in.
- Fill out the petty cash reconciliation to reconcile petty cash and write the account number that the expenses



should be charged to. Each account number should total the applicable receipts. Include the receipt issued by the Scout along with copies of your expense receipts. Reconcile your petty cash, the total of the expense receipts and Scout Shop receipt should equal the petty cash amount issued.

- Petty Cash reconciliation should be turned in no later than five business days after the event completion.

COUNCIL CONTINGENCY FEE- The Council Contingency Fee is included in every event's budget to cover the administrative costs associated with that event and unplanned expenses. Some of these costs are obvious such as administrative overhead, printing and promotions, professional and camp staff services, accounting, website services, and more.

The Council Contingency Fee is 20%.

REFUNDS/CANCELLATION POLICY: Refunds for events may be granted in a specific set of circumstances. The individual requesting a refund must submit a refund request, and approved refunds will be processed within 30 days of the last day of the event. Refunds will be made by credit card reversal, or check to the original payor. Refunds may also be made to unit accounts.

Refunds are only provided through the Council Office, and will never be given at an event.

- Paid registrations can be transferred to another participant of the same type who was not previously registered to attend
- Cancellations made more than 30 days prior to the event are fully refundable.

- Cancellations made within 30 business days of the event, a refund of 80% will only be considered in one of these circumstances
 - The family moves out of council
 - There is a death or serious illness in their immediate family requiring their attendance
 - They become ill and unable to attend the event (doctors verification may be requested)
 - The participant becomes ill while attending the event and is sent home by the event medical personnel
- If an event is cancelled or postponed and the participant cannot attend on the alternate date, the full fee will be refunded.

Step 5- Promote, Promote, Promote

Now it's time to let everyone know the specifics about your event. In step 1 you identified who you expected to attend your event. Knowing how to reach your target audience requires coming up with a plan. This is one of the most important steps in ensuring a successful event and the one most often overlooked.

The most successful marketing plan allows for your target audience to hear about your event at least 5-7 times. Direct mailing, roundtable promotion, unit visitations, email announcements, the Crater Lake Council website, phone calls and personal contact are all effective tools to promote your event. Don't rely on just one of them.

The Crater Lake Council Staff is here to support your efforts in promotion. The staff will get your registration set up on the Council Web Site, send out a total of five seven messages to promote the event in both email and social media, and provide



you a contact list of units to call. To receive the support from the council staff it is important that following steps are completed early in the planning process

- Complete the calendar submission form completely. Make sure your description sells the sizzle.
- Submit seven total messages to promote the event. Submit these in a word document in the order you want to them sent out. Video messages are encouraged but not required
- Submit pictures that you would like to use with the messages. Please submit these in either jpeg or gif format.

The Council Website will create an informational flyer for all events that provides our Council paid support staff with the ability to give out information about your event to anyone who calls or stops in with questions.

If you would like a more graphical flyer, the council staff can help you that, but appropriate time will be needed to complete that process. All flyers created need to follow the Boy Scouts of America Branding Guidelines

Step 6- Recruit Staff/ Planning Committee

Don't do it alone. It takes a village - delegate. Use the resources of the council's volunteer committees, Commissioners and unit volunteers. Working closely with the appropriate council committee chair and the staff advisor may provide access to community leaders who could assist as well. Typical responsibilities requiring staffing include: Logistics; program; promotions, food, medic/camp health officer. Always staff critical functions with two or more volunteers so you have back-ups.

Some events will require an NCAP Administrator, for more information see the section on NCAP.

Delegation is good leadership and helps to train next year's event leaders... even if that will still be you!

Step 7- The Event (Executing your plan)

During the event the chairman and Staff Advisor should not be tied down to a specific task. Give yourself the freedom to walk around and see how all aspects of the event are working. Take notes on things that went well and things that need to be improved.

Step 8- Wrap Up or Closing Action Report

After the event, a formal wrap up meeting should happen with as many committees and staff as possible. At a minimum a meeting with the Staff Advisor and the appropriate council committee chair or VP should take place to compare notes. Close out the budget, and make an after-action report. Create an electronic file containing all action items, contacts, committee, meeting agendas and so on, to pass along to the next event chair - even if that will be you.

Both the event chair and professional should thank every volunteer who served on the event committee. Special recognition can be done at the event thank you notes are just one way to show your gratitude.

Miscellaneous items

Event Patches: Event patches should be ordered through your Staff Advisor. To ensure patches are available at the event, designs should be submitted 90 days in advance of an event. Be sure your patch ideas abide by BSA licensing policies.



Staff Items: If you choose to create T-shirts, hats, and other items to identify and recognize volunteer staff, it is important to work with the Staff Advisor. Many times, the council has vendors who can provide the items you want at a significant savings. In addition, these items must be paid for out of the event's budget. All events are financially self-sustaining. Remember, only a professional staff member can enter into a financial contract with a vendor on behalf of the Council.

Council Committee Involvement- Crater Lake Council has a number of volunteer committees including: Membership, Fund Development, Aquatics, High Adventure, Commissioner Service, Advancement, Training and Shooting Sports. Some events fall directly under the leadership of these committees, and the approval of the appropriate Council Committee Chair, or Council Vice President will be required. This is designed to ensure program continuity for our youth across the council and to help reduce the likelihood of conflicts on the council calendar.

Shooting Sports: The council has a volunteer run shooting sports committee to help plan and support events which would like to offer shooting sports. The council has some

shooting sports equipment available to check out to use at events. Equipment must be checked out through the Shooting Sports Committee. Off council property ranges require prior approval by the council's designated Chief Range Safety Officer, and a Private Property Approval for Shooting Sports Form must be completed with the property owner and on file with the council at least 90 days before the event. This form needs to be renewed every 2 years.

Customer Service: All volunteer and professional staff should have a customer service attitude when it comes to events and activities. Making an event easy to register for, having plenty of information available, returning phone calls, and making check-in a simple process are just a few things to keep in mind. Even the best laid plans have complications and when they do, we want to make sure we do everything possible to make the "customer" happy and satisfied. When an issue arises with a customer it is always best to take them to the side to address the issue in private. Work with the Staff Advisor when it comes to difficult issues.

Remember the secret to a happy customer and successful event is to treat others like you would like to be treated.

Good luck!

May all your events put a smile on a Scout's face!

National Camp Accreditation Program- NCAP

Any event that uses the BSA Brand and is organized as an overnight camping program, that is one, two or three nights in length needs to meet the NCAP standards for Short-term events. This includes events like camporee, Webelos Woods, training events, if it has an overnight, NCAP standards apply.

A BSA-branded program includes any program offered using the name, trademarks, copyrights or trade dress of the BSA.

The Event planner/Chair will be responsible to ensure the event/camp meets all applicable National Camp Standards. They will be familiar with the NCAP standards and will proactively reach out to the NCAP Chair/Administrator for technical assistance and with questions. Specific procedures follow

The Event planner/chair is responsible to provide the necessary documentation for review by the Short-Term Camp Administrator to complete the onsite event assessment, and when needed submit documentation to request waivers or variances. Each Short-Term Camp is required to show compliance with **all** standards in the following areas:

- Standards and Applicability (SA)
- Health and Safety (HS)
- Food Service (FS)
- Facilities (FA)
- Authorization to Operate (AO)

Each Short-Term Camp is required to show compliance with the standards applicable to their specific event in the following areas:

- Program Design (PD)
- Program Standards (PS)
- Staff Qualifications (SQ)

Please review the National Camp Accreditation Program Short-Term Standards At-A-Glance for a list of all the standards. Remember, the Short-Term Camp Administrator will provide technical assistance to help identify what needs to be submitted. The more that is done ahead of the event, the simpler the actual assessment will be. The event planner/chair will need to submit the appropriate materials as listed under "verification" within each applicable standard.

Some common standards to be aware of:

1. Your event may need to provide Port-O-Potties. The standard is 1 toilet seat for every 30 people. Remember to include this expense in your budget. The average cost for one standard Port-O-Potty is \$100 and \$150 for an ADA accessible seat. Connect with a vendor ASAP to verify the anticipated costs.
2. You will need a Camp Health Officer (Medic)- Depending on the response time from the nearest fire station your medic may need to have a license and Wilderness First Aid. They will need to complete a one-time training, and provide a copy of the completion certificate. Provide a Google Map showing the time from the nearest fire station, that can respond or a letter from the fire chief with the
3. Have a plan for garbage collection. The venue may provide garbage service, or you may have a plan to pack in and pack out.
4. Provide Proof- If certificates are required, please gather copies of them. This includes but is not limited to Food Handlers Cards, professional licenses, first-aid/CPR cards, NRA and USA Archery certificates as well as National Camp School Training Certificates.

Procedure for Short Term Event Planners and Chairs:

1. Fill out the Authorization and Assessment for Declaration for Short-term Camps as shown in the highlighted sections on the following sample:

NCAP Local Council Authorization and Assessment Declaration
Part A – Local Council Authorization
 (To be completed prior to camp planning)

Council: _____ **Camp Type:** Day Camp Short-Term

Camp Title: _____

Camp Description (including attendee type such as Cub Scouts, Scouts BSA, Venturing, Adults, Families etc): _____

Date(s): _____ **Number of Sessions:** _____

Location: _____

Location Type: NCAP Authorized Camp Property Non-NCAP Authorized Site
(Attach NCAP Site Appraisal Form)

The council has reviewed the above and any attached information. The council verifies that this camp(s) will be conducted in accordance with the BSA National Camp Standards and within the council's Authorization to Operate. We authorize this camp at this location and on these date(s).

 Signature of Scout Executive or Designee

 Signature of Day Camp Director or Short-Term Camp Administrator (as applicable)

Date: _____ Date: _____

2. Submit the form to the Council NCAP Chair via email no less than 90 days prior to the event start date. Please submit this form as early as possible to help the volunteers who will come to assess your event can make plans. It's never too early to submit these forms. Forms submitted with less than 90 days in advance of the event, run the risk of not having a short-term administrator assigned, and therefore will not be approved. Meeting these timelines is required to ensure your event can run as a council event.
 - a. Once the information has been received, a Short-Term Camp Administrator/Assessor will be assigned to the event. The designated Short-Term Camp Administrator/Assessor will reach out to the event chair to verify dates, times and locations as listed in the documentation.
3. Provide as much documentation as possible with the Authorization and Assessment for Declaration form, including the approved budget. The more documentation that can be submitted prior to the start date, the more that can be verified before the assessor arrives on site.

Activities or events that include aquatics, shooting sports and/or climbing/COPE will be reviewed for compliance by the appropriate council committee. These committees may have additional authorization forms to complete to provide approval for these activities at a property. In the case where Crater Lake Council does not have one of these committees, the council's Risk Management Committee and Youth Safety Committee will be asked to review for compliance, and may also seek advice from the appropriate Territory Committee, a different BSA Council's committee or BSA National.

NCAP Site Appraisal Form - Once the Event planner/chair has determined the location for the event, they should review the list of camp properties currently covered by the Crater Lake Council's Authorization to Operate. If the location is not included on that list, then they shall notify the Short-Term Camp Administration Committee, via email, and request a Site Appraisal. A Short-Term Camp Administrator/Assessor will follow up to arrange a site appraisal, this will help identify any issues with the property so they can be addressed. A representative of the Event planning committee should be present. Please provide as much notification as possible, and no less than 120-days in advance of the event.

Short Term Camp Administrators and Assessment Teams:

Short-Term Camp Administrators have completed a specific training through the BSA National Camping School and are part of the Council NCAP Committee. The Short-Term Administrator can not have a significant role in the event planning.

It will be the responsibility of the Short-Term Camp Administrator to:

1. Be the primary point of contact with the event Chair/planner and to provide technical assistance in determining which standards apply to the event and answer questions about verification of standards, including when a waiver or variance is needed.
2. Be present on the first day of the of the event, preferably during check in, and complete the assessment of the event.
3. Complete the Assessment by reviewing all verification documentation and make an accreditation determination based on the specific requirements in the standards. Camps will be either Accredited, Conditionally Accredited, or Denied Accreditation.
4. Gather and submit, preferably electronically (scan and email), all relevant paperwork and supporting documentation for each assessment.

NCAP Site Appraisal Form: Crater Lake Council's designated Camp properties (Makualla and McLoughlin) are covered by the Councils Authorization to Operate and have already been assessed per NCAP standards. Every Short-Term Camp held at any other location will required the NCAP Site Appraisal Form to be completed by a member of the Short-Term Camp Administration Committee to be submitted with the Authorization and Assessment for Declaration for Short-term Camps. NCAP Site Appraisal Forms are required for each short-term event held at the property.

Reference Documents