

Guidelines for Planning District and Council Events

MacHuskerTrails College of Commissioner Science
Doctorate Project

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reviews are in-progress and I expect they will help to validate the guidelines and identify some areas for improvement. ???

Introduction

These Guidelines were prepared to identify components for a Team to consider when planning an Event. The goal is for them to consider what may help plan the Event. A good share of these guidelines present topics to be considered which would result in identifying tasks to develop plans for the Event. Not all the topics may be necessary for a particular Event. Also, with the variety of Events that could be held, these Guidelines could not cover or address all the specific tasks or details. It is up to the team to review these Guidelines and identify the necessary tasks.

As identified before, the purpose of these guidelines is to assist a Team plan and execute an Event for the District or Council. This planning includes developing the details of the Event and to execute the plan by presenting the Event. The term "Event" is used as an all-inclusive name for what is being planned. These Events may be referred to by what type of Event they are such as an activity, a training, a campout, a meeting, a banquet, etc., but for these guidelines they will all be called an "Event".

Within the Event, some type of "Program" is expected to be developed and presented. The Program content is the main reason the Event is being held. The Program may outline the specifics of a training; awards for a banquet; the stations at a Camporee; the tasks at a retreat; or the stations for a twilight camp to name a few. The Event also requires a number of "Logistics" items to define, develop, and execute the Program. The Event encompasses all the "stuff" needed so the Program can happen and be successful.

The idea for the Event may result from several possibilities. It could be from District or Council annual planning sessions; a need identified by a District or Council committee; a need identified by professional staff; or by another person or group who saw a need and are acting on it. No matter the origin, the Event Logistics and Program must be identified in enough detail so the tasks can be identified and planned. These details include: 1) Purpose of the Event; 2) Program objectives; 3) Length of the Event; and 4) Type of facility required. These basic details outline the Event and provide the information required for the planning process.

Example of Need

One example where I expect these guidelines can help in the Salt Valley District is planning Scouts BSA District Camporees. Over the last decade, our Camporees have transitioned from

their Event. Maybe some of the topics or examples will give them ideas for planning their Event.

Planning is a Project

These guidelines present the planning process as a project. A project has a defined beginning and end; requires tasks to be defined and completed; a schedule for those tasks; controls in place to monitor the project; and identifies any deliverables. The planning process will identify and develop the details of the Event and those required to execute the Event.

Components of the Guidelines refer to project related terms. A section regarding Project Management is included as an overview but does not go into many details. Those type of details were not a focus for these Guidelines.

Answers to the Questions! (and several more)

Several questions were listed in the Executive Summary. This section is to provide some answers along with a few more questions and answers.

Questions from the Executive Summary were:

- “Where do we start?”
- “What needs to be done?” and
- “Who is going to do it?”

We’ll begin with a new one, “When to Start?”.

When to Start?

There is no exact way to answer this, but you don’t want to wait to long. If you start to late, it may be hard to recover and still present a successful Event. It is better to start earlier and then decide later that you have time to pause than to start late.

It is good to begin planning Events well before they are scheduled to happen if possible. As a suggestion, starting at least four to six months prior to the actual Date(s) is a good lead time. Of course, this can be adjusted based on the type of Event, complexity of the Event, along with if it is the first time for an Event or a repeat of the Event. This lead time may not reflect the

- Plan a College of Commissioner Science training Event the last Saturday of March for Commissioners in the area. The College should have courses for the Bachelor, Master, and Doctorate levels along with Continuing Education type courses. This event requires several classrooms as well as a large meeting space for group sessions such as the opening, lunch, and closing. All rooms require audio/video equipment.

Core Team: Having the Project Statement completed, another early task is to identify the primary people to be involved in planning the Event. The Core Team and leader should be identified or recruited as needed. Consider this Core Team to be like having a committee with a chairperson and several committee members. The project Team concept is used in the guidelines to represent the Core Team along with the idea that once the Event is done the Teams purpose is done also.

Specific Requirements: Another early task is to make sure that any specific requirements, if any, are known and documented. These may be specific items to include or not include because of a limited scope.

Next Actions

With the project team defined, it is time for the next group of actions which will expand on the Event details. As each group would expand into multiple tasks.

Expand Program: One of those actions, or tasks, is to define in more detail the expected Program content and any facility-related requirements. Facility requirements include those for the event in general and anything specific for the Program. Indoor considerations include classrooms, equipment, conference/ball room, auditorium, amphitheater, audio/video, etc.). Outdoor considerations include campsites, shelters, picnic tables, lake, etc. Another consideration is if food will be provided or not.

Dates/Venues: With the Program better defined, another early task is to research potential Date(s) and possible venues. For Dates, review the Council calendar, community activities or events, and holidays around the desired time frame. For Venue, in addition to Program items also consider provisions for disabilities and in case of severe weather.

Event Description: It is also good to draft an Event Description. That will summarize the content regarding the Event for others to understand what it is about and provide a consistent message.

Budget: You also should identify expected costs and a budget for the Event along with proposed fees. Verify these with the stakeholders to ensure they are acceptable. If not, are adjustments feasible without sacrificing quality, delaying the Event, etc.?

3 – 4 weeks; then every 2 – 3 weeks; and may move to weekly in the month before the Event happens.

- Program: Define Program in more detail and facility-related requirements. Depending on the Program details, you probably will have multiple tasks related to the Program; each to develop parts of the Program.
- Date and Location: Finalize and lock-in the Date(s) and the Venue/Facility. If it is a non-Scouting Venue, is a contract or certificate of insurance required? If so, it is suggested to have a scouting professional involved with this.
- Registration: Finalize fees along with registration open and close dates. Provide Event registration information for the web page. Identify any Day_of check-in or check-out requirements and tasks.
- Promote the Event: This may include a save-the-date; discussion at Roundtable(s); emails and social media posts. Create tasks for each of these items.
- Program Materials: Plan and develop the Program and related materials. This may include developing documents; brochures; maps; design and order patch; design and order awards/certificates, or other related items; order supplies; etc.
- NCAP review: Review general plans for the Event with the District/Council NCAP (National Camp Accreditation Program) Administrator. The initial review will help determine if these standards will apply to the Event or not. If the Event involves an overnight stay, or is more than 10 minutes from emergency services, or is serving food, they probably do apply! If they do apply, follow-up NCAP meetings will involve more details each time with the final one to sign-off on the Event.
- Physical arrangements: review what is required and who provides or handles each part. What is provided by the Venue and what is from others including who? Identify tasks for each.
- Setup: includes gathering materials and equipment; transporting to the facility; and setting everything up. A number of tasks should be defined for this.
- Execute the Event: It is the Day_of and time to hold the Event. Identify the tasks for executing the Program that will help make the Event successful.
- Teardown: Undo the Setup related tasks and cleanup related tasks should be defined.
- Follow-up: Examples of things here include review lessons learned; prepare Thank You notes; prepare final budget and review with the Stakeholders. Define tasks for these and other actions.
- Close the Event Project: Identify tasks necessary to close the project. Examples may be to store documentation about the Event for possible use later; thank and disband the Team(s); etc.

Most of the above Topics represent a group of individual Tasks to be identified. Each should be included in the Event task list. An example of these are the Team meetings. Each meeting should be included in the task list. Having each individual task included in the list helps ensure everyone knows what is expected.

- Responsible for coordinating tasks related to the venues or facilities used for the Event. This includes reserving the venues and related rooms, campsites, public areas, portable toilets, Program equipment, trash, tables and chairs, etc.
- Logistics are the items required to execute/put on the Event.
- Program
 - Responsible for planning and production of the Program items during the Event including people making presentations, staff, etc. They are also responsible for preparation of completion certificates; ordering patches (allow at least eight weeks); maps of the Venue/Facility and Program areas; printed program documents; etc.
 - Developing the Program is critical for the success of the Event. The Program is the reason the Event is being held.
- Safety and Health
 - Responsible for Safety and Health items during the Event. This includes providing basic first aid (or more if required for the type of Event); review of or confirm in-hand attendee's health forms; informing attendees of restroom locations, emergency exits and take cover locations, smoking areas; anything related to food; monitor weather conditions; etc.
 - This Role is involved with all things related to Safety for the Event. They will have tasks involved with the local NCAP administrator.
- Registration
 - Responsible for registration information on the website and providing registration counts to other Teams. For the Day_of, having registration materials available; tracking check-ins against the registration list and possibly check-outs following the Event.
 - Tasks will be in several areas of the schedule such as: the earlier parts for defining the registration page; the middle for developing registration materials; and the later part for Day_of tasks.
- Food/Sanitation
 - Responsible, if applicable, for food and drink as well as snacks, cracker barrels, etc. This includes food prepared/provided by a third-party and brought in; food prepared on-site by a third-party or by Event Team members; handling trash; etc.
 - This could be considered along with the Safety and Health Role but is identified separately due to the considerations with it. If providing food is part of the Event, many related tasks should be identified.
- Finance
 - Responsible for preparing and monitoring the budget; expenses; setting the fees; purchases; etc.
 - Related tasks should be identified.

Using a Workback Schedule spreadsheet was a new term to me when working with my District Executive. It is a simple method to develop a schedule and manage it and also can be used to include tracking the project. If an initial list of tasks was captured in a spreadsheet, it can be expanded for use as a Workback Schedule spreadsheet. This is done by defining a number of days column and a calculated date column. The Day_of row has the number of days set to zero and the date column is set to the Day_of value (when the Event begins).

These guidelines propose a simple method to schedule tasks and to track the schedule. This simpler scheduling process is a Workback Schedule. It involves listing the tasks and identifying when they are to be completed using the number of days before or after the Day_of. This schedule development process is intended to not be a burden or time consuming. It doesn't require a lot of the details as in more formal project management processes, such as for construction projects, where estimating the number of hours for each person and for each task or managing resources such as equipment. Some project management processes work on task details to determine when a project could be done. In our case, we have the targeted Date(s) defined, Day_of, and need to work backwards from that date to identify when each task should be completed. This also helps with evaluating if the targeted Date(s) is reasonable.

The first example Workback Schedule in the Appendix, and copied below, shows part of the design with a few example tasks (which is not a real or complete schedule). This is a 2-week/14-day schedule with 2-weeks after the Event. This uses a value for each Task that indicates the number of days either before the Event start date (negative value) or after the Event start date (positive value). The Event start date, highlighted in red, is set to the date the Event begins and the number of Days cell has a value of zero. By changing the number of days for a Task, it will automatically update the date related to that Task.

Example 'Event Workback Schedule' showing Date Calculation

2 Week/14 Days

| Task to be completed | Days Before(-)/ After(+) | Date |
|--------------------------------------------------------------------|--------------------------|------------|
| Identify/Recruit Project Leader and core Team Members | -14 | 9/30/2022 |
| Calculation for 'Date' column on line above | =IF(C\$8>0,C\$8+\$B3,"") | |
| Team meeting | -10 | 10/4/2022 |
| Final review with NCAP Administrator | -5 | 10/9/2022 |
| Setup | -1 | 10/13/2022 |
| Day of Event (start day; Day_of date) | 0 | 10/14/2022 |
| Teardown | 1 | 10/15/2022 |
| Team meeting | 7 | 10/21/2022 |
| After Review: lessons learned, thank you notes, budget final, etc. | 14 | 10/28/2022 |

Another example schedule in the Appendix is based on a 6-month/180-day period for planning an Event.

Planning

Planning Activities is where the details of the Event are defined and scheduled along with the budget and required resources are identified.

The various tasks for the Event are identified and added to a task spreadsheet. A Workback Schedule spreadsheet is easy to use for this. When the list of tasks is near complete, the date for each task is assigned by entering the number of days before or after the Day_of start date. The completion dates are calculated. Consider that things change during the Executing Activities. While making plans, be sure to include some flexibility and think about what is most likely to change.

Following this, the tasks are ready to be worked on in the Executing Activities.

Executing

This Executing Activity is where the actual work on the project tasks is done. The projects collection of tasks and deliverables must be completed to have potential success for the Event. Executing takes each task and carries out the work for that task. This includes developing all the project deliverables.

Near the end of the Executing Activities is when the Event is held. Most all of the development tasks should be done with the execute tasks remaining. This part of the project is to implement all the detailed work from the planning portion required to put on the Event.

Controlling

The fourth Activity, Controlling, actually occurs throughout the project; from project initiation through its completion. This is how the Teams regularly compare the current status of their project with the original plan. A Project Tracking process is important while working on an Event. You review the tasks to make sure they are progressing as planned. If not, take any necessary action to get things back on track or make other adjustments. You may also identify tasks that need to be added to the schedule so do that. In addition to checking the schedule, costs should also be compared to the budget.

You can use the Workback Schedule spreadsheet to also track the status of tasks. By adding a 'Completed' column to the spreadsheet, a task can be marked as completed by entering the

Appendix

Example Task Workback Schedules

This example is not a real or complete schedule but is to illustrate the workings of a 14-day Workback Schedule spreadsheet. It shows the basic design to assist with understanding the contents. The Day_of task has a value of zero for the number of Days and the Day_of date is '10/14/2022' and is highlighted in red. The other cells in the Date column consists of calculations to determine a date value for the task based on the number of Days value. Changing the number of Days, will change the date accordingly. A negative value will calculate a date before the Day_of (such as the first 'Team Meeting' task; -10) and a positive value will calculate a date after the Day_of (such as the 'Tear Down' task; +1). The first 'Team meeting' task is to be completed 10 days before the Event on '10/4/2022'. The 'Tear Down' task is to be completed 1 day after the Event on '10/15/2022'. The calculation basically is if there is a value in the Day_of cell (the date of the Event) then the date for the task is determined by adding the number of days to the Event date for the first task line '9/30/2022'. If there is no value in the Day_of cell, meaning the Event date is not set, the other date values are set to a space (blank) which is not illustrated in this example.

Example 'Event Workback Schedule' showing Date Calculation

2 Week/14 Days

| Task to be completed | Days Before(-)/ After(+) | Date |
|--------------------------------------------------------------------|--------------------------|------------|
| Identify/Recruit Project Leader and core Team Members | -14 | 9/30/2022 |
| Calculation for 'Date' column on line above | =IF(C\$8>0,C\$8+\$B3,"") | |
| Team meeting | -10 | 10/4/2022 |
| Final review with NCAP Administrator | -5 | 10/9/2022 |
| Setup | -1 | 10/13/2022 |
| Day of Event (start day; Day_of date) | 0 | 10/14/2022 |
| Teardown | 1 | 10/15/2022 |
| Team meeting | 7 | 10/21/2022 |
| After Review: lessons learned, thank you notes, budget final, etc. | 14 | 10/28/2022 |

| | | | |
|--------------------------------------------------------------------|-----|------------|--|
| Promote | -14 | 9/30/2022 | |
| Review updated plans with NCAP Administrator | -14 | 9/30/2022 | |
| Team meeting | -11 | 10/3/2022 | |
| Registration closed | -10 | 10/4/2022 | |
| Gather materials for pickup/delivery for setup | -7 | 10/7/2022 | |
| Team meeting | -4 | 10/10/2022 | |
| Setup | -1 | 10/13/2022 | |
| Final review with NCAP Administrator | 0 | 10/14/2022 | |
| Day of Event (start day; Day_of date) | 0 | 10/14/2022 | |
| Teardown | 2 | 10/16/2022 | |
| Team meeting | 7 | 10/21/2022 | |
| After Review: lessons learned, thank you notes, budget final, etc. | 14 | 10/28/2022 | |

Commissioner Mission, Vision, Objectives, Goals and Methods

??? Is this needed? Initially included to explain what or why items about commissioning. A link to the National website may work but requires the reader to take another action and it could change.

Our Mission

As commissioners, we share the BSA's mission: To prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values of the Scout Oath and Law.

Our Vision

Every member of the BSA has a great Scouting experience.

Our Objectives

1. Supporting unit growth and retention through the journey to excellence.
2. Contacting units and capturing in commissioner tools their strengths, needs, and a unit service plan that enables continuing improvement.
3. Linking unit needs to district operating committee and other resources.
4. Supporting timely unit, district, and council charter renewals.
5. Supporting unit leaders by collecting and distributing information, enabling program training, and providing networking opportunities.

Our Goals

1. Enable an increased number of units.
2. Enable the retention rate of units.
3. Enable implementation of a unit service plan through collaborative detailed assessments and an increased number of significant unit contacts.

Our Methods

1. The Unit Roadmap
2. New Member Coordinators
3. Unit Key 3
4. The Unit Service Plan
5. Journey to Excellence
6. My.Scouting Tools (Including Commissioner Tools)
7. Continuous Recruiting
8. Assigning Resources to Greatest Needs