

**Purpose:**

This policy exists to ensure that Quivira Council is delivering consistently excellent program activities at the Council and District level. This policy sets forth certain standards by which all of our Council and District events (including Order of the Arrow activities using Council property or Council services) are to be planned and executed. The policy does not provide a step-by-step planning guide or checklist for each activity, although other forms and tools are available with such information. The policy does provide key standard practices that must be adhered to for Council and District activities, including those related to budgeting, use of Council properties, on-line registration, marketing and promotions, and similar topics. This policy is administered by the Council Program Committee.

It is the responsibility of the Program Committee to review the policy at least annually, and use that opportunity to make updates to the policy based on key learnings and best practices identified over the course of the Program year. When changes to the policy are necessary off-cycle from the annual review, the Council Key 3 can authorize changes until such time as the revised policy can be proposed to and ratified by the Council Executive Board.

**Definitions (Don't skip this section, it is important!):**

- **Activity** – All program events, training courses, camping, or other activities within the purview of the Program function of the Districts and Council. Order of the Arrow activities using Council properties, Online Registration, or other Council services must

adhere to this policy. The use of this policy for Order of the Arrow events not relying on Council properties or services is highly encouraged.

- **Activity Director** – The District or Council volunteer designated as the person responsible for leading the organization and execution of an Activity.
- **Administrative Cost** – A cost applied to the budget of each Activity to offset the costs of professional staff administrative duties to support the event/activity. The cost to be added is fifteen percent (15%) of the participant fees and of any net revenue generated from sales at the Activity.
- **Activity Staff Advisor** – Professional Council staff member responsible for providing support and guidance, as needed, to the Activity Director for a given Activity. The Activity Staff Advisor will be designated by the Council Scout Executive and any changes to the identity of the Staff Advisor will be immediately communicated to the Council Vice President of Program and the Activity Director. “Staff Advisor” as used herein means Activity Staff Advisor.
- **After Action Review** – A session to provide and discuss feedback after execution of the Activity, with a focus on determining what went well and should continue, what did not go well and could be improved, and whether the Activity met its goals; including, the final activity budget to actual.
- **Early Bird Deadline** – A date by which registrants will pay the lowest fee to participate in an Activity. The Activity Director and Staff Advisor will set this date based on the nature of the event. Factors to consider include whether an activity requires a longer timeline to recruit and develop staff, event materials or approvals that may require a long time-horizon to prepare or purchase, etc. It is strongly recommended that this deadline

should be set a minimum of 30 days prior to the Final Registration Deadline especially if non-refundable material purchases are necessary prior to the event.

- **Early Bird Fee** – The lowest fee offered to participants and that which will be paid prior to the Early Bird Deadline. The Early Bird Fee will be established during the activity budgeting process. When creating a final Activity budget, the Early Bird Fee should be calculated by taking the total budget expenses for the activity, divided by the minimum number of fully paid participants required to be registered by the Go/No Go Date. The Activity Director should put together a plan to market the Activity aggressively and encourage Participants to register before expiration of the Early Bird Fee.
- **Event Flyer or Event Details** – An overview of the Activity, that includes basic key information about an Activity, including dates, time, location, programming offered, registration information, fees, and volunteer contact information. This should be prepared by the Activity Director and Staff Advisor as soon as practicable. Online registration cannot be completed until this information and a final budget is provided to the Staff Advisor.
- **Final Registration Deadline** – The last date that participants will be allowed to register for an Activity. The Activity Director and Staff Advisor will set this date based on the nature of the event. Factors to consider include the amount of lead time needed for required materials that must be purchased or ordered in advance to be available at the time of the event, quantities of food or other materials that must be purchased that may be difficult or impossible to return if too much is purchased, printed materials that must be developed and produced for the event, etc. In no case should the Final Registration

Deadline be any less than 7 days prior to the start date of the event, except for those activities where a waiver was authorized by the Council Scout Executive.

- **Go/No Go Date** – A date by which the Activity Director and Staff Advisor determine if an Activity will be cancelled. This date shall be set prior to making online registration available for the activity and will typically be prior to the Final Registration Deadline. In no case should a Go/No-Go Date be less than seven days prior to the event. On the Go/No Go Date, it will be determined whether the minimum number of participants have registered for the event or not; if not, then the Activity should be cancelled. Registration for the Activity shall be equal to or greater than the minimum number of participants used to calculate the Early Bird Fee; ensuring, the event can proceed without a financial loss or other serious negative consequence, such as lack of a meaningful program for participants. It is recommended that Activity Directors review registration status in sufficient time ahead of the Go/No Go Date to undertake efforts to secure additional participants and avoid Activity cancellation.
- **Participant/Activity Cost** – As a part of planning and budgeting for an Activity, the Activity Director should initially determine the total cost of the Activity. The Activity Cost will typically be made up of fixed costs, such as facility fees, and costs which will vary based upon the number of participants, such as food cost, participant materials, pro-rata insurance, etc. The Administrative Fee is part of the total Activity Cost along with any other required fees; such as, per participant insurance fees during the event. The cost per participant will be determined by dividing the total Activity Cost by the minimum number of participants necessary to hold the Activity and thus establish the Early Bird Fee. As an example, if the total Activity Cost for an event is determined to be \$1,000 to

hold an Activity for 50 participants, the Participant Cost (and the Early Bird Fee) would be \$20 per participant. Care should be taken in order to make certain that an Activity does not need to be cancelled on the Go/No Go Date by setting unrealistic expectations for the number of participants used to calculate Participant Cost. In general, “no cost” Activities should be extremely rare, since at least some cost (such as pro-rata insurance) are generally applicable to any Activity.

- **Standard Registration Fee** – The fee participants will pay after the Early Bird Deadline has passed and up to the Final Registration Deadline. The minimum Standard Registration Fee shall be at least \$5.00 more than the Early Bird Fee for Activities with an Early Bird Fee of less than \$20.00, at least \$10.00 more for Activities with an Early Bird Fee of \$20.00 - \$49.99, and at least \$15.00 more for an Activity with an Early Bird Fee of \$50.00 or more. The Activity Director should realize the incentive, and market the Activity aggressively, to secure the minimum number of participant registrations during the Early Bird Fee period, and the Standard Registration Fee should be sufficiently high to provide an incentive for participants to register early. The guidance listed above is a minimum standard and the Activity Director has discretion to exceed the listed amounts.
- **Walk-In Registration and Fee** – The Activity Director will determine whether the Activity is of a nature that will allow participants who have not met the Final Registration Deadline to take part in the Activity by showing up on the day of the Activity. In deciding if Walk-In Registration will be allowed, consideration should be given to whether adequate safety, supplies, volunteers, and other key elements can be provided under the circumstances. Walk-In Registrants will be assessed a walk-in fee that is at least \$5.00 more than the Standard Registration Fee brackets. Consideration should be

given to timing of publicizing the availability of Walk-In Registration prior to the Go/No Go Date has passed and the event is a GO.

### **Activity Planning and Milestones**

The goal of the Council Program Committee is to have at least eighteen months of program Activities planned, listed on the Council calendar, and available for Online registration at any given time. These Activities will be reviewed and discussed at the Council Combined Committee meetings in the Spring and Fall of each year. To accomplish these goals, Activity Directors must be selected and provided appropriate support to have completed the budget and Event Flyer or Event Details in order for the Staff Advisor to enable Online registration well in advance of their Activity.

Proper planning and follow through are critical to the success of Activities. While there is no one-size-fits-all approach for each Activity, there are certain elements and milestones that should be considered to achieve success. These include:

- Creating a vision for the Activity and the Event Flyer or Event Details, to include key program elements, advancement opportunities, service availability, and training components, if any.
- Developing a project plan and milestones
- Preparing a Budget and enabling Online Registration
- Recruiting key volunteers, including necessary medical personnel
- Ensuring that any required national standards are met, including when appropriate, Short Term Camp Administrator certification

- Preparing an effective marketing plan
- Ensuring that any needed materials or equipment are available
- Timely ordering of materials, including food, for arrival prior to the Activity
- Tracking of income and expenses
- Establishing registration and other day of activity protocols
- Activity execution
- Celebrating success and holding an After Action Review

### **Activity Budgets & Participation Fees:**

Each Activity must have a budget that is complete, reasonable, and timely submitted. The Activity Director and Staff Advisor will develop a preliminary budget, which the Staff Advisor will have approved by appropriate Council personnel as soon as practicable. Once approved, it will be considered the final budget. Ideally and to meet Program goals, the preliminary budget and Event Flyer or Event Details should be completed and submitted by the Activity Director 18 months prior the Activity. The Staff Advisor should enable Online Registration within ten business days of receiving the Event Flyer or Event Details and final budget approval. Online Registration shall not be made available without finalizing Event Details; including, final budget, Early Bird Fee, minimum number of registered participants required, and Go/No Go Date, among others described herein. When finalizing activity budgets, Activity Directors should keep in mind that their budget should allow for estimated expense inflation between making Online Registration available and the actual Activity Date, along with budgeting any sinking funds for maintenance or endowment that may be required for recurring Activities. Activities shall not be conducted at a loss. As the Go/No Go Date approaches for an event the Activity Director and

Staff Advisor should review the minimum required registered participants and adjust this value if the total Activity Cost has increased since finalizing the activity budget; thus, ensuring the activity does not go forward with the potential for operating at a loss. For an Activity that is recurring, it is suggested that budgets from previous events be used as reference to develop the preliminary budget.

Unique and/or unexpected opportunities to offer Activities may arise within a Program year, necessitating a quicker submission of the preliminary budget and Event Flyer or Event Details. Council Activity planning currently occurs twice a year with Activities updated at the end of the first quarter and the third quarter each year; providing, an opportunity roughly every six months to introduce new Activities into the Council planning cycle. If Activities arise with a Go/No Go Date less than six (6) months in the future then such Activities may only be planned, promoted, and executed if approved by the Scout Executive. Activities with less than ninety (90) days to the Go/No Go Date are very unlikely to be approved by the Scout Executive.

The Participant/Activity Cost must be an outcome of the budget process and be used to set the Early Bird Fee that will be collected for the Activity. Costs should be calculated based upon the minimum number of participants paying the Early Bird Fee needed for the event to be held. Ideally, the Participant Cost will be scalable to accommodate the total cost for the range of Participants from minimum required to the maximum allowable. For example, if the total Activity Cost is \$1,000 and the participant fee is \$20.00 with fifty (50) anticipated participants, the addition of twenty-five (25) participants should not result in a total Activity Cost of more than \$1500. In no case should the Participant Cost be less than the full cost to complete the Activity based on the minimum number of participants needed to host an Activity.



The Activity Director, Staff Advisor, and event staff members are collectively and individually responsible for operating within their budget. The Activity Director and Staff Advisor must review budgets and registration status periodically to ensure the Participant Cost that has been established will cover all anticipated costs. In addition, it is strongly recommended that the Activity Director require pre-approval of all expenses and/or restrict purchasing to a limited number of individuals to ensure there are no cost overruns for the activity. The Activity Director or their designee should track expenses by budgeted category as they are incurred and these should be reviewed periodically to help ensure an Activity meets budget goals.

In certain circumstances it may be necessary at the time of the Go/No-Go deadline to cancel an Activity due to low registration or other factors. Prior to Online Registration of the Activity, the Activity Director and Staff Advisor should determine the point at which a Go/No-Go decision should be made for an activity. It is strongly recommended that the registration status be reviewed before any non-refundable expenses (such as branded merchandise or food items that could spoil if the Activity is not held) are incurred for the activity to ensure the minimum participation threshold has been achieved for the Activity. Activities not meeting the minimum registered participants shall only proceed with authorization of the Council Scout Executive; otherwise, the Activity shall be cancelled.

The approach to refunds should be established for each Activity as part of the planning process and prior to Online Registration. It should take into consideration if and when purchases of non-refundable event supplies must be made compared to when participants declare they will not attend the event. The process for requesting and receiving a refund of registration fees is subject to the policies and procedures of the Council accounting department.

Staff members are required to register and pay their own way. Staff registration fees are expected to cover the cost of meals, apparel and any other expenses incurred related to the staff. The exception is for Resident Camps where paid members of camp staff receive certain benefits such as meals and apparel as a function of their employment by the Council for such events.

Within fourteen (14) days of an Activity, the Activity Director will cause their final tracking of revenue and expense for their activity budget to be delivered to the Staff Advisor. This will be used by the Council accounting department to help with booking expenses and preparing a budget to actual report from the Council accounting system; to be delivered, to the Activity Director and Staff Advisor within thirty (30) days of the Activity. An After Action Review must be conducted to include review of actuals to budget, participant feedback to identify what went well and should continue, aspects that require improvement, and new practices that should be implemented should the event be repeated in the future.

**Activity On-Site Registration:**

During the planning process, the Activity Director and Staff Advisor should determine if Walk-In Registrations will be allowed for the Activity. Note that Activities subject to BSA National Camp Accreditation Program (NCAP) or Short Term Camp Accreditation (STCA) standards such as resident camps, day camps, District camporees, or any council-organized overnight camping program that is one to three nights in length where the council provides staffing may have requirements for a minimum staff-to-participant ratio for program activities, such as aquatics and shooting sports. This should be considered when deciding whether Walk-In Registrations can, or will be, allowed, or whether a cap, or limit, on participation must be implemented.

It is expected that Walk-In Registrants will be assessed an additional fee consistent with this policy. Steps should be taken to ensure that at registration Walk-In Registrants provide the same required information as other participants, which may include information such as a unit roster, annual health record(s), and waiver(s) or permission slip(s). When applicable, Walk-In Registrants should be informed that there is no guarantee that they will receive event materials, such as in those cases when ordering of program materials has been done prior to the Activity. All pre-registered participants should be given preference to receive Activity materials over walk-in participants.

#### **Council Property & Equipment Usage:**

Quivira Council is blessed to have Quivira Scout Ranch as a resource to deliver the Promise of Scouting. Because “A Scout is Thrifty”, it is important that this resource is used wisely, and that the incremental costs associated with the use of the Council camp and equipment are covered by the budget for the Activity.

All Unit/District/Council activities or training events using Council buildings/equipment will be charged a fee to help defray the costs associated with maintaining the buildings/equipment, as well as any incremental utility or Council personnel costs necessary to use the facilities. These charges should be provided to the Activity Director by the Staff Advisor in a clear, written format and should be used as part of the Activity budgeting process described above.

### **Activity Expense Reimbursement:**

All efforts should be made to purchase items for Activities directly through the Council office. This is important because the Council may be able to make purchases in a cost and tax effective manner, lowering overall Activity costs. Ad hoc purchases by individuals are generally more costly and processing reimbursement places a burden on both volunteers and professionals. Such purchases should be the exception and not the rule. If there is a need to purchase materials for an event, these ad hoc purchases must be approved by the Activity Director prior to making such purchases. To ensure timely reimbursement, all receipts for ad hoc purchases must be submitted to the Staff Advisor within seven (7) business days after the event. Legible photocopies or images of receipts may be submitted in lieu of originals to expedite the submittal process.

All reimbursement checks will be issued in the check issuance cycle ninety (90) days after the deadline for submission of ad hoc purchases described above.

### **Marketing, Promotion, and Online Registration:**

An important element in the planning and execution of an Activity is ensuring it is communicated effectively to encourage participation. All communications must contain the basics - Who, What, When, Where and How Much – for the Activity. An Event Flyer or Event Details including this information is typically the first step in creating a comprehensive document that contains this basic information. The communication strategy should include a variety of communication methods since Scouts, Leaders and families have different preferences for staying informed about Scouting opportunities. The Council web page and Council and District social media pages are available as a minimum.

The Activity Director must have completed a preliminary budget and the information described above, for the Event Flyer or Event Details, before it can be promoted via the Council web site and/or other social media. In addition to promotion via the Internet, Q-News, District newsletters, emails, in person communication at Roundtables and similar events, as well as phone calls extending personal invitations to unit leaders can also be very effective and should be utilized.

Online Registration is currently available through the third-party vendor Blackpug. Efforts should be made to have Online registration available to participants as soon as practicable and, ideally, soon after the Event Flyer has been created. The Staff Advisor will provide the Activity Director with a list of information necessary to secure Online registration. Once submitted, Online registration will be made active by the Staff Advisor within ten business days.

**Waiver:**

In some circumstances, a waiver of the requirements of this policy may be necessary or appropriate. While a waiver process exists if it is necessary to deviate from the policy as outlined, Activity Directors and Council Staff Advisors are encouraged to do their best to minimize or eliminate the need to submit waiver requests. Everyone involved is encouraged to demonstrate flexibility and to collaborate to find solutions to achieve the Activity as well as the Council Program objectives in accordance with this policy.

Waivers will be considered on a case-by-case basis. All waivers must be submitted to the Staff Advisor no later than 30 days prior to the Activity, or preferably early in the event planning process as the budget and Event Flyer is being developed. The request must include the reason for the request as well as options that were considered prior to concluding that a waiver is

necessary. The Staff Advisor will ensure that all waiver requests are immediately provided for approval by appropriate personnel in the Council Office.

**Exemption:**

Not every meeting of Scouters occurring in the Council is an Activity and therefore there are a number of exemptions from this policy; such as, any Council or District Meeting held to conduct the business of the Council, specifically, Council Board Meetings, Council Executive Committee Meetings, Council Combined Committee Meetings, Council Committee Meetings or Sub-Committee Meetings, District Committee Meetings, Activity Planning Meetings, or similar events where the purpose is related to the operations of the Council and not the delivery of Scouting to Participants. However, for exempt events to be available for Online registration or promotion they still require many of the same items as required for an Activity.