Activity Planning Guide

Before beginning any event, the event chairperson must receive a copy of this guidebook and review it with the event staff advisor.

Chief Seatle Council
Scouting America

Version date: Jannuary 2026

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Introduction

This Activity Planning Guide provides the steps for planning, conducting, and closing a district/territory or council event. It supports volunteer organizers and council staff advisors.

Scouting events are a partnership between volunteers and Scouting America's policies including those spelled out in the National Camp Accreditation Standards guide. All events must be approved by the Chief Seattle Council Executive Board and staff advisors. Non-compliant events may be modified or cancelled. Annually the council staff along with volunteers will create an 18-month calendar of events offered, while events can be added and the process for event planning must be followed. Council events are defined as any event with multiple units in which money and or personal information including names and contact information is being collected, if this is the case council registration systems for events must be used.

The financial health of the council depends on each event's success, as it contributes to the budget. Events must be self-sustaining and follow financial procedures to ensure proper fund usage.

Event planning must comply with guidelines set by the Financial Accounting Standards Board (FASB), the IRS for 501(c)3 organizations, the Chief Seattle Council Executive Board, and the National Council of Scouting America.

Thank you for contributing to an event that will positively impact Scouts and Scouters!

Steps to Planning an Activity

1. EVENT INITIATION

Define The Activity

Activities for youth and leaders are selected by a territory/district committee in coordination with the council program committee Defining if the event is a Council or Territory activity will determine who from the council staff will be serving as staff advisor and supporting the volunteer chairperson.

Activities should have specific and well-defined objectives. A training course should provide enough information to assist adult leaders in fulfilling their position responsibilities, where a Camporee provides participants a method for experiencing scout fellowship, competition, skill development, and fun.

Before an activity is selected, it must first be asked, “Does this activity take the place of regular unit programs, or does it supplement programs where units may not be able to conduct this activity on their own?” It is not the responsibility of a territory/district or council to provide events just for the sake of holding events. Activities only exist to assist unit leaders in providing an ideal year in Scouting for youth and families.

Approved activities are included in the annual council calendar and distributed to unit leaders. Activities not included in the calendar must be approved at least 180 days before the activity.

Identify Event Chairperson

Territory/District Activity Chairpersons are approved by the Territory Key 3, comprised of the Territory Chairperson, Territory Commissioner and District Executive. The Council Vice President of Program, Council President, and Scout Executive/designee approve Council Activity Chairpersons.

Before a chairperson can effectively begin their task, they must first understand what is expected of them. Each activity requires a detailed job description. A job description should be created for each event position before recruiting for the job.

SAMPLE JOB DESCRIPTION

Chief Seattle Council   Scouting America

Camporee Event Chairperson

<u>JOB DESCRIPTION</u>

JOB OVERVIEW: The Camporee Event Chairperson is responsible for the overall planning, management, and execution of the Chief Seattle Council's Camporee event. This individual ensures the event runs smoothly, engaging Scouts and volunteers in meaningful, safe, and fun activities, fostering a spirit of teamwork, competition, and leadership development.

SUPPORTED BY: Program Director/Staff Advisor

WORKS WITH: Camporee Committee, Territory Committee, Territory Commissioner Corps, other Camporee Chairs

KEY RESPONSBILITIES:

- Oversee planning and coordination of all aspects of Camporee, including theme selection, activity coordination, scheduling, budgeting, logistics, safety, and compliance with council and Scouting America Guidelines.
- Recruit and coordinate a Camporee committee.
- Ensure activities are safe, fun, and suitable.
- Coordinate event breakdown, gather feedback, and submit a final report summarizing outcomes, challenges, and a final budget.

Select a Date

Dates for the next 18 months should be submitted to the council via Territory leadership or council committee during the annual Council Calendar building process. This process happens in the spring. Once a date is approved and published in the annual calendar, it cannot change. Just because the chairperson or location is unavailable does not constitute a valid reason for changing a date. During the unit annual planning process, units are building a schedule far in advance, often a year or more out. Remember, district/territory events are not scheduled for the sake of having events, or because “they have become tradition.” If a chairperson or location becomes unavailable, choose a new chairperson and/or a new location. If you need to add a program after the calendar approval process, you will need approval from the Staff Advisor.

Select a Location

Choosing a location can sometimes be challenging. All activities should find locations that are reasonably priced. Paying for a site can add substantial costs to the scout and family. In all cases, a written agreement or contract must be negotiated between the site owners and signed by the Scout Executive or designee. Additionally, a site appraisal form (for non-council owned properties) must be included for Scout Executive or designee review. When selecting non-Chief Seattle Council owned property National Camp Accreditation Program standards must be followed to determine the site's suitability.

Build a Back-Dating Schedule

A backdating calendar will assist the chairperson, the staff advisor, and the activity committee to keep on track. It also helps ensure that items are ordered on time, materials ready, and people are in place to make the event successful. A specific schedule should be created for each activity. You can find sample backdating calendars on the Event Planning Resources page on the Chief Seattle Website. You can also find a sample backdating schedule below.

TASK - Backdates are considered completion dates	**Days Before Short-Term Camp**
Submit event date during the Spring 18-month Council Calendar building process	Varies
Confirm a Date; select chair; recruit Short-Term Camp Administrator	-210
Submit NCAP Local Council Authorization and Assessment Declaration Part A to council for approval and signature.	-200
Draft the Budget, Leader's Guide, and Welcome Letter	-180
Submit Registration Request Form	-150
Recruit Committee	-150
Staff Advisor Review; Confirm details from Registration Request Form, begin building registration	-140
Initial Planning Meeting; Review Registration, Review Budget, Marketing Plan, Confirm Facilities	-120
Promote at roundtables, district committee meeting, and district commissioner meeting.	-110
Hold event committee meeting; develop program; make assignments; Update Program Materials; Confirm Short-term Camp NCAP Requirements.	-90
Registration and Web Page Live	-90
NCAP Site Survey - Confirm Authorization	-60
Submit Purchase Orders, Order Patches, Supplies, etc.	-60
Reconfirm Physical Arrangements and Staff Members	-14
Pick up all materials; take to site.	-2
Set Up	-1
Host Event	0
Return Equipment, Turn in Registration & Money	+7
Submit Final Bills, Invoices, Etc.	+7
Host Evaluation Meeting	+14
Submit Close Out Report	+14

Submit an Event Proposal Form

Submit an Event Proposal Form on the Chief Seattle website. The completed Event Proposal Form will be directed to the event staff advisor and reviewed.

1. STAFF ADVISOR REVIEW

Once received, the staff advisor will review the Registration Request Form and confirm event details with the volunteer lead. The Outdoor Adventures Registration Specialist will begin building registration.

2. INITIAL PLANNING MEETING

The Initial Planning Meeting should be held 120 days before the event and should include the following key stakeholders: Event Chairperson, Registration Specialist, Camp Director (if event is at a council site), Staff Advisor and/or Program Director. This meeting will follow a set agenda.

Meeting Agenda

Review Event Registration

Review the completed event registration details for accuracy and completeness. Confirm event name, date, location, fee structure, registration format (individual or group), and ensure all required documents (flyer, leader guide, map) are prepared for upload to the registration system. Verify that the registration aligns with council standards and includes all necessary information for participants.

Facilities and Program Support Needed

Each event requires a different number of staff. In all cases, be sure that for each position recruited there is a job description prepared. Staff at a minimum should meet National Camp Accreditation Program standards.

Depending on the activity you may have additional staffing needs as outlined in the SQ section of the National Camp Accreditation Program Standards. An example of this could be a thorough understanding of SQ 405 related to Health Officers in camp.

Reminder: For non-Council owned properties, a site appraisal form is required. For Council owned properties, clear expectations of what parts of camp are necessary for the event are required.

Communications Plan

All events utilize the online reservation system (also referred to as Black Pug) to allow participants and staff to pre-register. No paper registration forms or outside registration platforms are permitted for territory or council events – this assures consistent customer service for members and offers them great convenience.

- All online registration forms will include the name and location of the event to aid individuals in finding the event registration online.
- Online registration forms can be done in multiple formats: individual or group as dictated by the event. (i.e., Camporee signups are by group, WFA signups are by individual)
- All online webpages will include PDF files of the event flyer, event leader guide, and map to event location. Please prepare these items and include when submitting the online registration form so that your event can be built quickly and efficiently.

All general or mass communications to registrants will be coordinated and executed through the Outdoor Adventures Registration Specialist. The event chairperson's contact information will be available to participants so that they may reach out with direct questions

The website will be updated with the latest details as they become available. Once the event registration is live, the final edits to the website will be made, marking it as fully prepared for marketing efforts.

Marketing Plan

Before any promotional materials can be produced for or distributed at roundtable or mailed, electronically or in print, to unit leaders, it must meet the Scouting America standards and guidelines and be approved by the Staff Advisor or Council Marketing and Communications Director.

In addition to the Scouting America standards, all flyers and online materials must adhere to the following guidelines

- Materials must have the event name and Territory name at the top of the flyer in the standard council flyer header and prominently include the phrase "Register online at…"
- Materials must include the location, date, cost, what to bring, council refund policy, registration deadline, and contact information for the event coordinator and Staff Advisor.

If necessary, a Patch/Logo will be created as the Standard Pocket Circle Patch. This will be utilized in marketing materials to promote your event through our channels, along with the information provided on the event sheet. The committee will receive 4 artwork selections, with 2 revisions or redo requests which should be returned within the week.

The council provides a standardized marketing schedule for council and territory events via social media (Facebook event, Facebook post, Instagram post) and email newsletters. Items will be added to the Adventure Trail until the event closes. Territory or program-specific items will receive territory/program-level email messages.

Event Promotion Schedule

- Once submitted to the council, a Save the Date message is created.
- Registration Now Open message will be posted on Facebook as Event.
- One Month Out: reminder email & social media post on council networks
- Optional: Two Weeks Out: reminder email & social media post.
- One Week Out: reminder delivered by email and social media if needed.
- Optional: Deadline is Tomorrow message delivered if needed. (i.e., the event is not full).

Pro Tip: Graphics can be provided by the Council Marketing and Communications Director, who will help design promotional materials on request.

Budgeting/Finance Procedures

Using the previous year's budget, the Chairperson and Staff Advisor will prepare a draft budget. Use the Event Budget Template. For many events in Chief Seattle Council, there is a minimum standard fee of $30. A list of events with the $30 minimum fee can be found in Appendix A. Council leadership will continuously review the minimum fee annually and adjust as needed.

It is best to determine all expenses before setting event fees. If the expenses are too high, recalculate and adjust expense plans until a reasonable fee can be established for all participants.

Set the fee structure for ALL participants. Be sure to plan for late participants, adult, and staff fees. Everyone who attends an activity, including adult leaders, should pay their own way**,** either directly with a staff registration form or through their unit's registration. Make fees fair and justifiable.

Youth with need can apply for camperships by filling out the Campership Application Form.

Any staff recognition items should be meaningful but must be only a minimal portion of the event budget, and meant as a simple, thoughtful 'thank-you.' Staff items such as hats or shirts to identify staff at a large event may be appropriate and/or necessary, but costly items such as jackets or sweaters are too extravagant and may not be approved. Summer camps are the only exception, as they are long-term activities.

Income and expense account numbers are four-digit codes. These account numbers are necessary to keep track of specific transactions for the event, and to accurately reflect the event's financial activity. Each activity is assigned a three digit' Cost Center' number that identifies the event to the council bookkeeping department. Accounting Codes are used in the budget, on purchase request forms, purchase orders, and when identifying receipts for reimbursement.

All Territory/District activity budgets must be reviewed by the Territory Chairperson and approved by the Council Camping Director/Program Director and the Director of Support Service. All final pre-event budgets are due to the staff advisor 120 days before the event.

ALL ACTIVITIES MUST BE CLOSED OUT NO LATER THAN 14 DAYS AFTER THE EVENT. After all invoices have been paid, the council will print a cost center report detailing income and expenses; a copy of this report will be added to the final event report.

Review Last Year's Closing Report

The Staff Advisor will provide the activity documents for last year's event (stored in SharePoint). Documents could include a closing report, a final budget with a forecasted budget for this year, copies of the promotional materials, registrations, and purchase orders.

Schedule Follow-up meeting if necessary

Post-Meeting Tasks

Registration Specialist

- Add the event to the Event Tracking Form
- Create the event in the registration system
- Add the event details to the council calendar (if not already done)
- Once live, notify the team via email, and update the event tracking form.

Marketing and Communications Director

- Update the Event Web Page based off the Event Request Form, notify team once live
- Execute Email Marketing
    - Roundtable Roundup (1st week of the month)
    - Territory Newsletters (1st or 2nd week of the month)
    - Adventure Trail (immediately after Territory newsletter)
    - Training Tracks (3rd week of the month)
    - Department mailers (1st and last week of the month)
- Execute Social Media Marketing: The Marketing and Communications Director establishes a schedule with posts rotating through current activities and coordinated with other departments for updates.

3. CONDUCT EVENT PLANNING MEETINGS

Periodic staff meetings will keep your team members informed, trained, and on track to complete their tasks. Staff meetings should be included in the event backdating calendar.

Make Purchases

The activity chairperson is responsible for the maintenance and accounting of the activity budget. It is important to review the purchasing procedures with everyone who may purchase supplies for the event. All cash receipts should be reviewed with the activity registrar.

The following procedures have been established to assist council and territory activity chairpersons and their committees to properly account for all transactions regarding an event.

Purchases may be made in the following ways: Purchasing from a vendor with a Purchase Order, purchases made by a volunteer or council staff member via personal approved fund as needed, or petty cash held by staff members. All expenses must be pre- approved by the staff advisor and fit into the council activity budget as approved by the council executive board.

Personal money is a last resort to purchase supplies or services. Those who spend personal money may find that they are not reimbursed if the purchase did not have prior approval from the staff advisor.

Purchasing From a Vendor with a Purchase Order

Purchase Orders are the preferred method of purchasing. Upon approval of the Purchase Order, it will be issued to the person to buy only the stated supplies. To request a purchase order, work with your staff advisor to submit.

This process usually takes two to three days. A Purchase Order will be issued in the name of an established vendor who will later invoice the council for payment.

To make the purchase, a copy of the purchase order is presented to the vendor. The vendor will provide a receipt that must be returned to the council staff advisor, attached to a second copy of the purchase order.

When supplies are ordered from a catalog, a copy of the packing slip must be returned along with the second copy of the purchase order. This informs the bookkeeping department that these items were received, and that payment can be made.

At no time during this process can purchases be made until an official Purchase Order is issued. Do not request a vendor to start an order by promising to call back with a purchase order - the council is not obliged to pay without a pre-approved purchase order number.

It is highly recommended that purchases be made with an established council vendor. The council has established credit with a select group of vendors that provide common services for all activities. This will allow easier ordering, reduced pricing, and a relationship we can count on.

In most cases, it is best to utilize a vendor already on the council vendor list, as much work is required to establish credit approvals for each new vendor. Refer to the vendor list in Appendix B and/or request your staff advisor's help.

Invoices and Statements

Purchases made at established vendors will be paid for by the council upon the receipt of an invoice from the vendor. A statement given at the time of purchase is not an invoice. Some vendors, however, provide receipts in the form of an invoice and expect them to be delivered to the council office. No payment to the vendor will be made until these documents are turned into the council bookkeeping department. Therefore, please return ALL receipts to the bookkeeping office as soon as the purchase is made. This will speed up reimbursements and payments to vendors.

Receiving Shipments

All orders from catalogs, patches, t-shirts, etc. must be shipped to the nearest Council Service Center or Council owned Property – never to a personal home address.

Be sure to add the territory name or activity name in the "In Care Of" section of the shipping address so that the package is given to the event staff advisor. Return all packing slips to the staff advisor to show that all items were received, and payment can be made to the vendor.

Donations

Donations of supplies, food, and cash can be a great benefit to an activity. It is important to issue a receipt for ALL donations received and place a copy in the activity Folder.

Money saved by a donation does not allow additional unplanned purchases or the event to go over the spending limit. All donations must be properly receipted, and any cash deposited at the council service center. NEVER spend cash donations!

It is important that ALL donations of cash or items are properly recorded. If the donor contacts the council with a tax documentation request, the council cannot provide it if there is no record of the gift.

Donation recording also helps the event planner next year. When you record ALL donations, it is easy to see the actual cost of an event and plan appropriately even if a historical donation does not occur in the future.

4. CONDUCT THE EVENT

If proper planning procedures have been followed, you should have a safe, fun, and full event! However, experience shows that last-minute walk-ins, late registrants, and additional staff may require having money collected at the event.

Receipting Cash

A Field Receipt book will be issued by the council service center for all events. Fees collected at the activity must be properly receipted. The receipt must include the date, who it is from, the amount, if the payment was cash or check, the activity the payment was for, and a signature of the person collecting the money. Give the white copy to the customer.

Return Field Receipt book, and fees collected within 7 days of the event to the staff advisor. The yellow copies of the receipt book should match the cash and checks being turned in.

5. CLOSING OUT THE ACTIVITY

Properly closing out an activity ensures that all transactions are final, all bills are paid, and recommendations are made and recorded for improving next year's event.

It is imperative that all transactions are completed within 7 days of the event, and the event close-out is completed within 14 days. Event Evaluations should be completed within 14 days of the event.

Final Transactions

Immediately following the event:

- Turn in all cash payments received.
- Turn in all vendor invoices and packing slips.
- Turn in receipts for purchases made. Mark the receipts with the appropriate Purchase Order number, a check request is unnecessary for reimbursement.
- Turn in any paperwork as a reference for next year.

Budget Close Out

Evaluating the event's actual financial health is an important part of the post-event summary. This evaluation and resulting recommendations will help next year's event planners. Usually, an event is close to income and expense projections and budget – because event planners kept a close eye on participant reservations (fee income) and properly managed all expenditures (expenses) to reach a final balanced event budget. If not, however, there are two situations:

Expenses Greater than Income: This happens rarely, but occasionally unforeseen factors affect an event's budget.

Income Greater than Expenses: Events sometimes exceed projections. A careful review of the event should pinpoint the reason that income was higher than expected. Having greater attendance than planned is often the conclusion.

Excess income cannot be reallocated to other events or purchases.

Be sure to include an evaluation of the financial strength of the event in your closing report, to help you remember next year if you are again the event planner, or to assist the next event planner. Either way, the closing report is an invaluable tool for many reasons.

Evaluation Meeting

One of the activity chairperson's last responsibilities is to conduct a summary meeting of the event. Using the Event Evaluation and Closing Report Form as a guideline, the activity chairperson will be able to evaluate the event's success and seek recommendations for improvements for next year. Ask the staff to provide positive and negative feedback and feedback related to National Camp Accreditation Standards.

It is recommended that the post-event evaluation meeting occurs within one week of the event so that all issues and ideas are fresh in everyone's minds.

Complete a Closing Report

The activity chairperson's final act will be to work with the staff advisor to complete the Event Evaluation and Closing Report form and submit it to the event Staff Advisor. This should be done within 14 days of the activity.

Complete the report with as much detail as possible. It is recommended that additional pages be added if necessary. Be sure to include final numbers, recommendation for facility, program, and staff, and a suggestion for the new chairperson if the current chairperson does not wish to continue. Complete the actual budget column on the budget form, by tallying purchase orders, receipts, invoices etc., and then forecast next year's budget based on the same attendance as this year. Make sure to include evaluation forms and recommendations for next year. Once the next year begins, these documents can be retrieved and used to assist in planning.

Conclusion

On behalf of the Chief Seattle Council, thank you for chairing your activity. Your participation as chairperson for a youth or adult program is significant to the success of the Scouting aims and methods. Together with volunteers and council staff, we are making a difference in the lives of youth and families.

By following these procedures outlined in this manual, every youth, adult, donor, and staff can rest assured that their money was well spent, managed, and used properly for the benefit of all those involved in the activity.

Thank you again for your support, leadership, and enthusiasm for the Scouting program.

Frequently Asked Questions

How will scouts and scouters be able to register for my event?

A link to the event page on the council website will be included in the council calendar event. This link will be shared with marketing to be used in Facebook posts, compass points, and other promotions. You will be able to publish a link to the event page on flyers, newsletters, etc. so that members know where to go to register.

We have a registration form already. Can we use that instead?

No, a paper registration form should not be used. Please only include the official event registration link on your event flyer. Members may also get in-person registration assistance from Volunteer Service staff at the council office if they are uncomfortable registering from home.

Can we define a minimum or maximum for our event?

Yes, you can define a minimum, maximum, and even have an automatic wait list set up if you desire.

Can registrants pay their event registration fee online?

Yes. You define the fee, as well as an optional deposit fee

Can we set up a refund policy for our event?

There is a pre-defined council refund policy which applies to all events. This is to prevent confusion and frustration for members. All events will follow the pre-defined council refund policy.

Can I get access to check on my event?

Access is limited to council staff; however, we will share requested information such as rosters as needed.

Can I communicate with registrants?

All communications for events will be going out via BlackPug. This is because we want to ensure we are utilizing consistent communication avenues and language and to protect the privacy of our participants. Most of the communication with participants will be established during the initial planning meeting, but additional communication may be added. Additional communications can be shared with the event staff advisor and the registration specialist.

What is the 10% administration fee? What is the 10% contingency fee?

The 10% administration fee covers unseen costs such as staff salary, insurance costs, printing materials. The contingency fee may cover items purchased at the last minute or during the event or may cover a loss in income due to a lower turnout than expected.

Why is there a $30 minimum fee for some events?

Our event priorities are that they are safe, high quality, consistent, and sustainable. We have implemented this $30 fee as a starting point, to ensure that those priorities are met at certain events. You can find a list of these $30 events in Appendix A. We will of course continue to evaluate if this is the appropriate fee as things change.

Can I use the surplus from my event budget to buy new supplies/equipment?

The council operates over 100 events and activities that will range in surplus and deficit. If an event or activity ends with a surplus budget, that surplus will help to cover other events in the council that ended with a deficit. Because of this, we will not be using budget surpluses to purchase additional supplies after the event has concluded. If there are additional supplies needed for the event next year, we will work them into next year's budget for that event.

Appendix

APPENDIX A. $30 MINIMUM FEE EVENTS

Webelos Woods, Camporee, Klondike, Day Camp, Wilderness First Aid (WFA), IOLS, BALOO, National Youth Leadership Training (NYLT), Wood Badge, Range and Target Activity (RATA) Days, Range and Target Activity (RATA) Training

This list is subject to change at any time.

APPENDIX B. APPROVED VENDOR LIST

Coming soon. Work with your staff advisor.

APPENDIX C. LINKS

Event Planning Resources Web Page

Event Budget Template

National Camp Accreditation Website

NCAP Standards at a Glance

Event Evaluation and Closing Report Form (in development)

Data Use Policy

Staff Directory