



BOY SCOUTS
OF AMERICA®

GOLDEN EMPIRE COUNCIL

Activity Planning Guide

Prepared for all Professionals and Volunteers

Golden Empire Council
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Activity Planning Guide

Introduction

The Activity Planning Guide outlines the steps and procedures to follow in planning, conducting, and closing out a district or council event. This manual will assist the Activity Committee Chairperson, the Council Vice President or District Chairman, to whom the committee is responsible to, and the Council or District Professional Staff Adviser to the event.

It is the vision of the Golden Empire Council to provide every youth member a safe, meaningful, fun activity. Conducting an activity in the Boy Scouts of America represents a partnership between a committee of volunteers and the policies and procedures of the Boy Scouts of America. All events, district or council, is at the discretion and approval of the Golden Empire Council Executive Board. An event not complying with standards may result in an activity being not approved, cancelled or delays in payment of bills and services.

The total financial health of the council relies on the financial success of all events and activities, which comprise the council budget. Therefore, each activity must be self-sustaining. The procedures included in this manual help to assure participants of activities that their funds are being used properly and for the purposes intended. By making the council aware of all transactions, the council will be able to assist vendors and participants who may request payments and refunds.

Controls regarding cash receipts, income, and expenses are mandated by the Accounting Guide for Non Profits of the Financial Accounting Standards Board (FASB), the Internal Revenue Service for a 501(c)3 organizations, the Golden Empire Council Executive Board, and by the National Council of the Boy Scouts of America.

Throughout this guide, references will be made to the Council Stewardship Manual. This manual outlines the fiscal management procedure of the Golden Empire Council, Boy Scouts of America. Policies regarding activity receipts, expenses, cash controls etc, not addressed in this guide may be referenced through the Council Staff Adviser and the Stewardship Manual.

Several Booklets are available from the Boy Scouts of America to help specialized or specific events. For example, Recognition Meetings, Day Camp, Camporee, and Webelos Woods have their own guidebooks. These manuals serve as a secondary resource to this Activity Planning Guide. Further information is available in the Activities and Civic Service Committee Guide, No. 33082C. This reference outlines the responsibilities of the Council and District Activities and Civic Service Chairmen.

Selecting an Activity

Activities for youth and leaders are selected by a district committee in coordination with the council program committee. New events must be approved by the Council Program committee. If the Council Program Committee does not approve a new event, a district will not be allowed to run, or carry-out this event or activity.

Activity Planning Guide

It is important to keep in mind that activities or events 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 district or council to provide events just to have them. Activities are planned to assist unit leaders in providing an ideal year in Scouting for youth and families.

During the annual planning process, district and council activities are submitted to the Council Program Committee for review. Approved activities are included in the annual council calendar and communicated to unit leaders. The Executive Board has final approval of the calendar and activities. **All additional activities not included in the calendar must be approved at least 120 days before the activity by the Council Program Committee.**

Who is in charge of Events

District events are run by a District Activity Chair. This person is the key volunteer for this event and reports to the District Chair or District Commissioner and is assisted by the District Executive. They will serve as the Administrator or Staff Adviser of this event and are responsible to work with the Activity or Event Chair to guide the overall operation of the event, develop or build the online registration, advertising materials, establish the event fees or cost, the procurement of necessary materials, and maintaining all expenditures controls. Together, the Event Chair and the Professional Staff Adviser are responsible for keeping the event in line with budgeting guidelines of the Council.

If there is no chair for an event, it is the responsibility of the District Chair and the District Committee to determine if that event or activity will occur. If the District Committee determines that an event will go forward it will become the responsibility of the District Chair, or a person appointed by the District Chair, to run this event. The District Executive will serve as the Administrator or Event Staff Adviser. It is not the responsibility for the District Executive to operate this event. The District Executive is there to support the event, the event chair and their volunteers in helping to facilitate and guide the operation of this event to insure that the event operates within the Council's guidelines.

Recruiting a Chair

District Activity Chairs are approved by the District Key 3, comprised of the District Chairman, District Commissioner and District Executive. Council Activity Chairmen are approved by the Council Vice President of Program, Council President, and Scout Executive. Activity Chairmen serve a one-year term and must be approved for each successive year. Following the event, the activity chairman may make a recommendation for next year's chairman.



Activity Planning Guide

Selecting the Date

Once a date is submitted to the Council program Committee and it is approved and published in the annual calendar, dates for activities cannot change. Just because the chairman or location is unavailable, does not constitute a valid reason for changing a date. During the unit annual planning process, units are scheduling far in advance, what and when they will participate in activities. Remember, district events are not scheduled to just have them, or because “we have always done that.” If a chairman or location becomes unavailable, choose a new chairman and/or a new location.

Choosing a Location

Choosing a location can sometimes be a difficult task. Does the location provide enough parking, enough campsites and program area, does it have sanitation facilities? Is there a cost? Is it a reasonable cost? All activities should find locations that are free or less expensive. Paying for a site can add substantial costs to the boy and family. It is not the intentions of the BSA to pay for sites just because they are “perfect.” Look for sites where Scouting can make an impact, for instance can a service project be done. In all cases, a contract must be negotiated between the Activity/Event Chair, the Professional Staff Adviser, and the property owners. ALL contracts must be signed by the District Executive (Professional Staff Adviser) since they are employed by the Golden Empire council. A District Executive is the only individual that can legally encumber the Council for any financial obligations.

Review Chair’s Job Description

Before a chair can effectively begin his or her task, they must first understand what is expected of them. Each activity will require a detailed job description (Exhibit 1-1). Be sure to create a job description for each position that an activity/event staff member is recruited for. The Event Chair is responsible for establishing the formation of their staff and their job descriptions. The District Executive is there to help the Chair determine the needs of each event and help guide the Chair in making “wise” decisions regarding the event staffing needs.



Activity Planning Guide

EVENT CHAIRMAN JOB DESCRIPTION

FUNCTION: Manage the District/Council Event

RESPONSIBLE TO: District Chairman and District Executive / Council Staff Adviser.

WORKS WITH: District Executive, District Chair and Event Staff

RESPONSIBILITIES: Recruit and direct team members to accomplish the necessary tasks and insure event is properly staffed:

- Attend all appropriate monthly District Committee Meetings
- Make sure the Course Director and activity/event staff members follow the national training syllabus and activity guides.
- Create and distribute promotional materials to leaders
- Implement and follow Council budgeting and purchasing policies
 - Develop budget and promotional materials
 - Online registration is developed and submitted before event is opened
 - Follow Proper PO Procedures
 - Event is Closed Out Completely

Budget Approval

All District activity budgets must be reviewed by the District Chairman and approved by the District Executive (the Professional Staff Adviser) and submitted to the Director of Field Service (DFS.) Council Activities are reviewed by the Vice President of Program and approved by the Professional Staff Adviser and the Golden Empire Council Program Director. All budgets are due to the council bookkeeping department 120 days before the event.

Opening a Activity Folder

To officially conduct an event, an activity folder must be opened in the council office. An activity is considered “open” when an approved budget, promotional materials, which all include the activity account for the event, and an online registration are submitted and posted to the Golden Empire Council’s Event Registration by the Professional Staff Adviser.

An Event or Activity folder is then placed in a file cabinet at the front desk where the Activity/Event Chair, key staff and the Professional Staff Adviser can access it. Registration fees will be maintained by a Golden Empire Council staff member, and may be reviewed in person, online, mailed, or by telephone. The folder is not to leave the office. Copies of

Activity Planning Guide

registration information may be made by the responsible volunteer, the Professional Staff Adviser or another Golden Empire Council staff member during office hours.

The Professional Staff Adviser will be responsible for maintaining a working file that contains copies of the current active budget, copies of all purchase orders, invoices and receipts, and any material pertaining to the event. When the activity is concluded, the folder will be pulled by the Professional Staff Adviser and reviewed with the Activity/Event Chair for the closing report. This folder will be maintained and updated during the event or activity and then retained for planning purposes for next year's event planning.

Online Registration

Registrations for all events will be done through the on-line event registration system and must include a copy of the promotional materials. Any exceptions to this policy must have the prior approval of the DFS, Director of Program or the Council Scout Executive or his or her designate. All registrations must include Event Title and location of event.

Secure Council Approval of Promotional Flyer

Before flyers can be distributed or mailed, the Professional Staff Adviser for the event must approve all promotional materials. All promotional materials will include Council Name, District Name, Event Name, Date, Location, Cost, special requirements or trainings needed, Cost Center, Point of Contact, email and phone, and online registration link or location. Once the flyer meets the standards of the Council guidelines, then work orders can be processed for printing and mailing. (Sample is included)



Activity Planning Guide

Golden Empire Council

BSA KLONDIKE DERBY

PONY EXPRESS DISTRICT

March 11 - 13, 2011



Mark your calendars, wax the sled and fire up your winter attitude.
This year's Klondike Derby is bigger and better!

Location: North Tahoe Regional Park: 6600 Donner Road,
Tahoe Vista, CA 96148

When: Friday March 11th arrivals and set up camp
Saturday March 12 Competitions & Awards
Saturday Night or Sunday Morning Departure (Unit's option)

Cost: \$12 per attendee Scout & Adults by Feb. 15, 2011. \$15.00 after Feb. 16, 2011.
Includes Camping fee, patch, and awards.

Parking: \$3 per vehicle parking paid to NT Park Recreation District

Bring: Winter gear, Troop food and cooking heat source, one
equipped Klondike Sled per patrol, and the materials needed if
you are sponsoring a competition station.

Reservations: Online payment and reservations by March 5, 2011.

The number of attendees is limited by North Tahoe Regional Park so register soon.

Sled Designs and Sled gear list: http://scoutdocs.ca/Klondike/Klondike_sled_plans.php

Questions: Contact Kevin Volunteer
k.volunteer@comcast.net or (916) 555-1212

We highly encourage that each unit have an OKPIK trained member to ensure the safety of
your scouts.

We highly encourage that each unit have an adult with Outdoor Leaderships training to improve
the outdoor experience of your Scouts.

Online Registration: <http://www.gec-bsa.org/webpay/event>

1-6801-387-20



Activity Planning Guide

Distributing Promotional Materials

To adequately promote the event, promotional flyers should be distributed at the council office, roundtable, and mailed (if budgeted for) to unit leaders. A copy of the flyer must also be given to the front desk of the council service center in your area to be included in an information binder.

Refund Policy

It is the policy of the Golden Empire Council, that all fees are transferable, but not refundable. Failure to participate in an activity does not warrant a refund. However, refunds for emergencies, serious illnesses, unforeseen circumstances, death or job or military relocation may be considered. Requests will only be considered when they are put in writing within four (4) weeks of the event's conclusion.

All refund requests will be reviewed by the event Professional Staff Adviser. Some refund requests will need approval by the Golden Empire Council Finance Committee. All refunds and reimbursements requests submitted 30 days, or later, from the date of the event must be approved by the Golden Empire Council Finance Committee.

Making Purchases

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

Purchasing Procedures

All funds spent for an event will be controlled and approved, in advance, through the Professional Staff Adviser using specific approved procedures. Before any purchases can be made, the Professional Staff Adviser will review and give tentative approval for all purchases through the submission of a budget and a Request to Purchase form and appropriate price quotes for all items from a qualified vendor to insure that monies will be spent prudently. Final authorization for purchases will only be approved if the request falls within the activity budget expense line. Emergency expenditures require communication with the Professional Staff Adviser for authorization to buy in advance.

When a Request to Purchase form is approved, a Purchase Order will then be generated by the Accounting Department. A Purchase Order will then be returned to the Event Chair through the Professional Staff Adviser so that items can be bought for the event.

All purchases are to be a direct benefit to the event and the participants. For instance, purchasing large materials items, like Dutch Ovens, canopies, gas stoves, etc. are not always a direct benefit to the scouts, nor an event. In addition, these items are now to be considered

Activity Planning Guide

Council property items and must now be included in the council inventory and then stored for use by all districts in future events, if desired, and prudent. When unnecessary purchases are made the cost for storage and repair costs for the council increase, driving up entire cost of scouting.

Approved Purchases may be made in the following ways: Purchasing from a vendor, purchases made by a volunteer or Council Staff member, purchases made by a council check/gift card, and cash advances to volunteers or Golden Empire Council staff members. All reimbursement requests (receipts) must be submitted to the Professional Staff Adviser within 30 days after the event taking place. 30 day reimbursement extensions will be granted on a case by case basis because of extenuating circumstances. Any reimbursement requests received after this 30 day extension will have to be approved for payment by the Golden Empire Council Finance Committee.

Purchasing From a Vendor

This is the preferred method of purchasing. A Purchase Order will be issued in the name of an established vendor who will later invoice the council for payment. (A list of vendors is available from the Professional Staff Adviser or from the council bookkeeping department.) 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 office, attached to a second copy of the purchase order so a payment can be generated and sent to the vendor. The Professional Staff Adviser will make a copy of the receipts and PO submitted for tracking purposes.

In some cases where supplies are order 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 a payment can be made from a mailed invoice.

Purchasing with a Council credit card/membership card: (Sam's, Home Depot, Wal-Mart)

It is not necessary to "pre-shop" for prices and then shop again with the PO for food purchases. All other purchases require a written price quote, in advance, with detailed listing of materials that you are requesting to buy. To buy any items for an event, the buyer will have to follow these procedures:

1. Fill out the Request to Purchase form which should included a description of what you will be purchasing and where and price quote from a vendor of what it will cost. Example: 150 feet of rope to teach knots (3 feet of rope per participant X 50 feet per participants) total \$150.00 - \$1.00 per foot or Food for 25 participants @ \$6/person. Total \$150.
2. Send the Request to Purchase form to the Professional Staff Adviser.
3. The Professional Staff Adviser will review and submit for approval.



Activity Planning Guide

4. A Purchase Order will be issued as “amount not to exceed \$xxx”. In the above example the PO would be issued as amount not to exceed \$150.
5. On shopping day, The Professional Staff Adviser will meet you at the location with the appropriate card and you will make the purchases together.

Purchases Made By a Person

NO PURCHASES CAN BE MADE WITHOUT HAVING AN APPROVED PURCHASE ORDER. A Purchase Order will be issued in the name of the person allowing them to spend up to the maximum amount of the Purchase Order. To make a purchase, the person must spend his or her own money. Please keep event purchases separate from personal purchases. In cases where an emergency arises and a purchase must be made immediately the Professional Staff Adviser gives verbal approval for purchases. The Professional Staff Adviser will then submit a Purchase Order Request that includes the date of verbal authorization.

Please note that gasoline purchases or mileage expenses for travel are not refunded or reimbursed. Scouting mileage may be deductible from your personal taxes.

Purchases or Fees by a Council Check /Gift Card

Checks can be issued to vendors who will not extend credit to the council or for items such as site rental or catering deposits. Back up documentation (signed contract, vendor cost estimate, etc) must be submitted with the check request. This method is not preferred because often the event registration fees will not have been collected, attendance is difficult to predict, and the council may not have the funds available to advance at that time. Purchases of this type can only be entered into by the Professional Staff Adviser for this event.

Cash Advances

Checks up to \$250.00 will only be issued to the Professional Staff Adviser to pay for “petty cash” expenses. “Petty cash” expenses are purchases made during the event to supplement materials for higher than expected attendance, unforeseen needs, or emergencies. This method is also not preferred because it is often difficult to get an accounting for the expenses, obtain receipts and any remaining cash in a timely way following the event. Checks will only be issued to the Professional Staff Adviser who will then control who receives cash disbursements. All monies not spent must returned with the receipts for all monies spent. Unspent cash and receipts will be listed on a Petty Cash Recap form with account numbers on all receipts for budget tracking.

To use this method, the Professional Staff Adviser receiving the advance must account for the funds no later than seven days following the event. Failure to comply will result in



Activity Planning Guide

ineligibility for future check requests, Purchase Orders or reimbursements. An IRS 1099 statement will be sent to all individuals not closing out petty cash advances by December 31 of that year.

Request to Purchase Forms

To use any of the above purchasing methods, a person must first complete a Request to Purchase form. This form must include to whom the purchase order will be issued, the date purchase order is needed, a listing and description of the items to be purchased, with a price quote for the items to be purchased, the budget account number to credit the purchases, and a requesters signature. Do not forget to add estimated taxes and shipping charges. The form is then submitted to the Activity/Event Professional Staff Adviser who then submits it to the council bookkeeping department with a copy of an updated tracking budget with actual money (POs) listed by budget line.

Upon final approval, an official Purchase Order is returned to the person making the purchase, with a spending limit. At no time during this process can purchases be made until an official Purchase Order is issued or verbal emergency authorization is granted by the Professional Staff Adviser and an emergency PO request is submitted. Please allow at least one week for processing a Request to Purchase Form.

Items purchased that were not listed on the original request, and any amount over the spending limit, will not be reimbursed.

The Professional Staff Adviser will make two copies of the PO. One copy will be for the vendor or person making the purchase. The second copy of the PO is used to keep track of expenditures against the budget and will be kept in the Activity/Event Folder awaiting receipts.

To receive reimbursement, the Event Chair will then submit the Purchase Order, when the event is over, with the original receipts attached to the Professional Staff Adviser. Purchase Orders for "Petty Cash" will follow the same procedures but the event chair will attach a "Petty Cash" recap along with the original receipts. All receipts, as previously noted, must be received by the Professional Staff Adviser within 30 days of the event date.

Vendors vs. Individuals

It is highly recommended that purchases be made with a vendor rather than a volunteer. While it is acceptable to use a volunteer as a vendor it is not desirable since the Golden Empire Council uses a net 30 day billing plan. It is the desire of the Council to establish credit with a select group of vendors that provide common services for all activities.

"Common Services" arrangements generally allow easier ordering, reduced pricing, and develop a relationship we all can count on. The Professional Staff Adviser will act as a guide for navigating vendors.



Activity Planning Guide

Establishing a Relationship with a New Vendor

If you find a vendor in your area that you would like to work with, please inform the Professional Staff Adviser and they will contact that vendor to establish a relationship. At no time may a volunteer negotiate a contract without the council approval. This includes catering, patch orders, t-shirts, and rental fees.

Invoices and Statements

Purchases made at established vendors will be paid by the council upon the receipt of an invoice from the vendor, either directly or through the mail services. A statement given to the person at the time of purchase is not a bill. However, some vendors like Smart & Final, engravers, and caterers provide receipts in the form of an invoice and expect that they be returned to the council office. No payment to the vendor will be made until these “receipts” are turned into the council bookkeeping department. Therefore, with all purchases, please return receipts to the bookkeeping department as soon as the purchases are made, preferably with seven days of the purchase. 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. Be sure to add the District name or activity name in the “In Care of” section of the shipping address. Return all packing slips to the Professional Staff Adviser to show that all items were received and payment can be made to the vendor. **The Professional Staff Adviser for the event will be the only one allowed to make exceptions to this shipment policy.**

Reimbursements

Reimbursements for purchases made require that receipts be submitted with a copy of the purchase order within 30 day of the event. Reimbursement requests submitted after 30 days might not be reimbursed, unless authorized in advance by the Professional Staff Adviser because of extenuating circumstances. Any reimbursement requests received after the initial 30 day time span or the possible extension, as previously noted, must be approved the Golden Empire Council Finance Committee. The Golden Empire Council processes checks twice a month; approximately the 10th and 25th of the month. In order to have a check processed on either of these days, all paperwork must be submitted at least 10 days prior to the check run. Do not complete a new Request to Purchase Form to request a check for reimbursement. The purchase order, receipts and updated budget will establish compensation.



Activity Planning Guide

Donations (Gift in Kind)

Donations of supplies, food, and cash can be a great benefit to an activity. Many times, they are budget-relieving items, and are greatly appreciated. However, it is important to receipt all donations received, and a copy should be included in the activity Folder.

There are guidelines to be followed when donations are received: First, money saved in the budget or on a purchase order that was previously approved does not allow a person to purchase different items or go over the spending limit. In addition, if it is a cash donation, it must be properly receipted and deposited at the council service center. To use this donation, follow the same purchasing procedures as outlined above. Do not spend the cash just because you have it.

The Gifts-In-Kind/Project Sales program is designed to secure gifts of funds or materials that will underwrite operating costs currently included in the operating budget for the council or for District or Council activities or Events.

A Gift-In-Kind is a direct contribution of products or services that are an allocated expense in a budget. Standard gifts-in-kind include printing services, office supplies, special event program materials and/or equipment used in the everyday operations of the council or events.

- Gifts in Kind are forms of payment. They can be used in any campaign and are a legitimate substitute for cash.
- Contributions will be credited to the appropriate pledge receivable account.

A thank-you letter needs to be written to the person or persons who have furnished this type of contribution and should describe the gift and the council's appreciation for it. Unless specifically instructed to do so, do not put a dollar amount in the letter.

All Gifts in Kind must have a "Gifts and Donation Form" submitted to the Finance Department at the close of an event so a "Thank You" letter can be generated for the closeout file and for Council Financial records.

Project Sales

A Project Sale represents a cash contribution that pays for a specific currently budgeted program or expense. The majority of contributions received for project sponsorship represent donations from companies, foundations, or service organizations. A few examples are funding for camping equipment, funding for School Night, Scouting fliers for camping, and funding for special events.

A way to keep this straight is:

GIK = Goods or Services

PS = Cash to fund a particular item

Activity Planning Guide

Receipting Cash

A Field Receipt book will be issued by the council service center for all events. Fees collected at the activity should be properly receipted. The receipt must include date, who 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.

Cash collected on site may not be used for purchases or reimbursements. The activity Chairman may use a “petty cash” fund or a Purchase Order for last minute purchases not monies from late registrations or items that might be sold at events.

Return the “change fund,” cash drawer, Field Receipt book, and fees collected within 7 days of the event to a council service center. The yellow copies of the receipt book should match the cash and checks being turned in.

Trading Post

Conducting a trading post at an activity can be a blessing or a burden. The Activity/Event Chair and the Professional Staff Adviser will need to weigh the pros and cons of having a trading post at an event. Many times, the amount of work and time involved necessary to staff, stock, and operate a trading post outweighs the profits received. However, this may be just what the activity needs to provide that special program, or recognition item.

To conduct a trading post, ample supplies will be required. Using the purchasing procedures, items may be purchased for resale. To maximize profits, return all items possible and then submit the receipts for reimbursement. Income generated from a trading post is credited to account number 6811 and receipts for the cost of the trading post are charged to 6812 in the activity budget.

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 PO number; a check request is not necessary for reimbursement.
- Turn in any unused “Petty Cash”, receipts, and a recap form.
- Turn in any Gift In Kind forms.
- Turn in any paperwork to be included in the Activity Folder as reference for next year.



Activity Planning Guide

Hosting an Evaluation Meeting

One of the last responsibilities of the activity chairman is to conduct a summary meeting of the event. Using the Event Evaluation and Closing Report Form as a guideline, the activity chairman will be able to properly evaluate the success of the event and seek recommendations for improvements for next year. Have the Activity/Event Staff provide both positive and negative feedback. The chairman for next year would like to continue what is right and fix what is wrong.

Complete a Final Activity Report

The final act of the Activity/Event Chair will be to work with the Professional Staff Adviser to complete the Event Evaluation and Closing Report form, and to close the activity Folder. This should be done within 14 days of the activity.

Closing Report Form

Complete the form 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 chairman if the current chairman does not wish to continue. This report will be added to the Activity Folder.

Closing out the Activity

This could be the most important step in planning and conducting the activity. Properly closing out an activity ensures that all transactions are final, bills are paid, reimbursements made, and recommendations given for improving next year's event.

It is imperative that all transactions are completed within 30 days of the event, and an evaluation be completed within 14 days.

Retention of Activity Folder

With the Event Chair, the Professional Staff Adviser will:

1. Complete the actual budget column on the Budget form and then build a forecast budget for next year based on the actual registration.
2. Insure that all purchase orders are logged carefully on the PO expense sheet on the budget file.
3. Insure all POs and Petty Cash Recap is closed out properly with original receipts attached.
4. Insure a closeout and forecast budget is generated and placed in Activity Folder to be retained by DE.
5. Retain the Evaluation report, budget with supporting documentation, including a copy of the online registration tally, for next year's chair.



BUDGET PLANNING AND ACCOUNTING FORM

DISTRICT/COUNCIL: _____
 ACTIVITY: _____
 ACTIVITY DATES: _____
 ACTIVITY LOCATION: _____

INSTRUCTIONS:

* Use for all District / Council activities.
 * Complete and submit to Supervisor/Executive 120 Days pruior to event.
 * Final budget must be approved before purchases and orders are made.
 * Purchase Orders must be obtained and approved prior to each expenditure.

Chair _____
Staff Advisor _____

Approved By: _____
Closed Out : _____

EVENT COST CENTER # _____

INCOME	No. of Participants			Fee	Activity Performance			Forecast
	Last Year Actual	Budget	Actual		Last Year Actual	This Year		Budget
						Budget	Actual	
6801 - Fees Youth	0	0	0 @	\$ -	\$ -	\$ -	\$ -	\$ -
6801 - Fees Youth Late	0	0	0 @	\$ -	\$ -	\$ -	\$ -	\$ -
6801 - Fees Adult	0	0	0 @	\$ -	\$ -	\$ -	\$ -	\$ -
6801 - Fees Adult Late	0	0	0 @	\$ -	\$ -	\$ -	\$ -	\$ -
6801 - Fees Staff	0	0	0 @	\$ -	\$ -	\$ -	\$ -	\$ -
6811 - Trading Post Sales					\$ -	\$ -	\$ -	\$ -
6812 - Trading Post Cost of Sales					\$ -	\$ -	\$ -	\$ -
Other:					\$ -	\$ -	\$ -	\$ -
4701 - Project Sales					\$ -	\$ -	\$ -	\$ -
Total Attendance		0	0					
TOTAL INCOME:					\$ -	\$ -	\$ -	\$ -

EXPENSES	Item Descriptions	Last Year Actual	Budget	Actual	Last Year Actual	Budget	Actual	Budget
8101 - Medical, Health & Safety Supplies	_____				\$ -	\$ -	\$ -	\$ -
8103 - Program/Training Supplies	_____				\$ -	\$ -	\$ -	\$ -
8104 - Food Supplies	_____				\$ -	\$ -	\$ -	\$ -
8106 - Office Supplies	_____				\$ -	\$ -	\$ -	\$ -
8108 - Catering	_____				\$ -	\$ -	\$ -	\$ -
8301 - Postage & Shipping	_____				\$ -	\$ -	\$ -	\$ -
8402 - Site/Facility Rental	_____				\$ -	\$ -	\$ -	\$ -
8409 - Janitorial/Sanitation	_____				\$ -	\$ -	\$ -	\$ -
8601 - In Council Printing	_____				\$ -	\$ -	\$ -	\$ -
8609 - Outside Printing	_____				\$ -	\$ -	\$ -	\$ -
9152 - Recognition -- Adult/Staff	_____				\$ -	\$ -	\$ -	\$ -
9153 - Recognition - Youth (Patches)	_____				\$ -	\$ -	\$ -	\$ -
9155 - Recognition - Units (Ribbons)	_____				\$ -	\$ -	\$ -	\$ -
xxxx - In-Direct Overhead Costs (23%)	_____				\$ -	\$ -	\$ -	\$ -
xxxx - Contingency (10%)	_____				\$ -	\$ -		\$ -
Other: (Be Specific)	_____							
TOTAL EXPENSES:					\$ -	\$ -	\$ -	\$ -
NET INCOME OVER/UNDER EXPENSE:					\$ -	\$ -	\$ -	\$ -

DATE BUDGET CLOSED: _____

Expenses

	Date	Vendor / Name	PO #	Description	Individual Receipt Amounts	
8101 - Medical, Health & Safety Supplies					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
8103 - Program/Training Supplies					\$ -	
					\$ -	
					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
8104 - Food Supplies					\$ -	
					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
8106 - Office Supplies					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
8108 - Catering					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
8301 - Postage & Shipping					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
8402 - Site/Facility Rental					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>

Date	Vendor / Name	PO #	Description	Individual Receipt Amounts	
8409 - Janitorial/Sanitation				\$ -	
				\$ -	<u>\$0.00</u>
8601 - In Council Printing				\$ -	
				\$ -	
				\$ -	<u>\$0.00</u>
8609 - Outside Printing				\$ -	
				\$ -	
				\$ -	<u>\$0.00</u>
9152 - Recognition -- Adult/Staff				\$ -	
				\$ -	
				\$ -	<u>\$0.00</u>
9153 - Recognition - Youth (Patches)				\$ -	
				\$ -	
				\$ -	<u>\$0.00</u>
9155 - Recognition - Units (Ribbons)				\$ -	
				\$ -	
				\$ -	<u>\$0.00</u>

Budget Tracking Form - Basic Training Only

DISTRICT/COUNCIL: _____
 ACTIVITY: _____
 ACTIVITY DATES: _____
 ACTIVITY LOCATION: _____

INSTRUCTIONS:

* Use for all District / Council activities.
 * Complete and submit to Supervisor/Executive 120 Days prior to event.
 * Final budget must be approved before purchases and orders are made.
 * Purchase Orders must be obtained and approved prior to each expenditure.

Chair _____
 Staff Advisor _____
 ACCOUNT ID# _____

Approved by: _____
 Closed Out: _____

Attendance

Cubmaster
 Pack Committee
 Tiger Den Leader
 Den Leader
 Webelos Den Leader
 Pack Trainer
 Scoutmaster / Asst. Scoutmaster
 Varsity
 Venturing

Total Attendance

No. of Participants			Forecast
Last Year Actual	Expected	Actual	Next Year
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0
0	0	0	0

Income

Gift-in Kind
 District Training Allocation
TOTAL INCOME:

\$ -	\$ -	\$ -	\$ -
\$ -	\$ -	\$ -	\$ -
\$ -	\$ -	\$ -	\$ -

EXPENSES

8101 - Medical, Health & Safety Supplies
 8103 - Program/Training Supplies
 8104 - Food Supplies
 8106 - Office Supplies
 8108 - Catering
 8301 - Postage & Shipping
 8402 - Site/Facility Rental
 8409 - Janitorial/Sanitation
 8601 - In Council Printing
 8609 - Outside Printing
 9152 - Recognition -- Adult/Staff
 9153 - Recognition - Youth (Patches)
 9155 - Recognition - Units (Ribbons)
 Other: (Be Specific)

Item Descriptions

\$ -	\$ -	\$ -	\$ -
\$ -	\$ -	\$ -	\$ -
\$ -	\$ -	\$ -	\$ -
\$ -	\$ -	\$ -	\$ -
\$ -	\$ -	\$ -	\$ -
\$ -	\$ -	\$ -	\$ -
\$ -	\$ -	\$ -	\$ -
\$ -	\$ -	\$ -	\$ -
\$ -	\$ -	\$ -	\$ -
\$ -	\$ -	\$ -	\$ -
\$ -	\$ -	\$ -	\$ -
\$ -	\$ -	\$ -	\$ -
\$ -	\$ -	\$ -	\$ -
\$ -	\$ -	\$ -	\$ -

TOTAL EXPENSES:

NET INCOME OVER/UNDER EXPENSE:

\$ -	\$ -	\$ -	\$ -
\$ -	\$ -	\$ -	\$ -

DATE BUDGET CLOSED: _____

Expenses

	Date	Vendor / Name	PO #	Description	Individual Receipt Amounts	
8101 - Medical, Health & Safety Supplies					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
8103 - Program/Training Supplies					\$ -	
					\$ -	
					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
8104 - Food Supplies					\$ -	
					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
8106 - Office Supplies					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
8108 - Catering					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
8301 - Postage & Shipping					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
8402 - Site/Facility Rental					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>

	Date	Vendor / Name	PO #	Description	Individual Receipt Amounts	
8409 - Janitorial/Sanitation					\$ -	
					\$ -	<u>\$0.00</u>
8601 - In Council Printing					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
8609 - Outside Printing					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
9152 - Recognition -- Adult/Staff					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
9153 - Recognition - Youth (Patches)					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
9155 - Recognition - Units (Ribbons)					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>

LEADER TRAINING REQUEST FORM

District _____

Date Needed By _____

Activity ID Code: _____

Leader Specific _____

Outdoor Leader Skills _____

<u>Reserve</u>	<u>Issued</u>	<u>Returned</u>	<u>Used</u>
-----------------------	----------------------	------------------------	--------------------

Training Items for Distribution

Cub Scout Leader Specific

--	--	--	--

Cubmaster

--	--	--	--

Pack Committee

--	--	--	--

Tiger Den Leader

--	--	--	--

Den Leader

--	--	--	--

Webelos Den Leader

--	--	--	--

Pack Trainer

--	--	--	--

BALOO
BALOO Handouts

--	--	--	--

Webelos Outdoor Leaders
Webelos Outdoor Leaders Handouts

--	--	--	--

Scoutmaster Leader Specific
Boy Scout Handouts

--	--	--	--

Introduction of Outdoor Leader Skills
Outdoor Skills Handouts

--	--	--	--

Varsity Leader Specific
Varsity Leader Handouts

--	--	--	--

Venturing Leader Specific
Venturing Handouts

--	--	--	--

Trained Cards - ____ Sheets (8 per sheet)
(1 for Basic Leader; 1 for Outdoor Leader Specific)

--	--	--	--

Trained Patches

Training Attendance Report

Please return all unused handouts, cards, and patches within 7 days of training.

Items issued to: _____ Date: _____

Items issued by: _____ Date: _____

Items returned (Date): _____

Charge Accounts (Debit)

Journal Entry (Credit)

Verified By: _____ 1-8601-____-20 \$_____

1-8601- -99 \$_____

Signature _____ 1-9152-____-20 \$_____

1-9152- -99 \$_____

DAY CAMP BUDGET PLANNING AND ACCOUNTING FORM

DISTRICT/COUNCIL: _____
 ACTIVITY: _____
 ACTIVITY DATES: _____
 ACTIVITY LOCATION: _____

INSTRUCTIONS:

* Use for all District / Council activities.
 * Complete and submit to Supervisor/Executive 120 Days prior to event.
 * Final budget must be approved before purchases and orders are made.
 * Purchase Orders must be obtained and approved prior to each expenditure.

Chair _____
Staff Advisor _____
ACCOUNT ID# _____

Approved By: _____
Closed Out : _____

INCOME	No. of Participants			Fee	Activity Performance			Forecast
	Last Year Actual	Budget	Actual		Last Year Actual	This Year		Budget
						Budget	Actual	
6801 - Fees Youth	0	0	0 @	\$ -	\$ -	\$ -	\$ -	\$ -
6801 - Fees Youth Late	0	0	0 @	\$ -	\$ -	\$ -	\$ -	\$ -
6801 - Fees Adult	0	0	0 @	\$ -	\$ -	\$ -	\$ -	\$ -
6801 - Fees Adult Late	0	0	0 @	\$ -	\$ -	\$ -	\$ -	\$ -
6801 - Fees Staff	0	0	0 @	\$ -	\$ -	\$ -	\$ -	\$ -
6811 - Trading Post Sales					\$ -	\$ -	\$ -	\$ -
6812 - Trading Post Cost of Sales					\$ -	\$ -	\$ -	\$ -
Other:					\$ -	\$ -	\$ -	\$ -
4701 - Project Sales					\$ -	\$ -	\$ -	\$ -
Total Attendance		0	0					
TOTAL INCOME:					\$ -	\$ -	\$ -	\$ -

EXPENSES	Item Descriptions				
8101 - Medical, Health & Safety Supplies	_____	\$ -	\$ -	\$ -	\$ -
8103 - Program/Training Supplies	_____	\$ -	\$ -	\$ -	\$ -
8104 - Food Supplies	_____	\$ -	\$ -	\$ -	\$ -
8106 - Office Supplies	_____	\$ -	\$ -	\$ -	\$ -
8108 - Catering	_____	\$ -	\$ -	\$ -	\$ -
8301 - Postage & Shipping	_____	\$ -	\$ -	\$ -	\$ -
8402 - Site/Facility Rental	_____	\$ -	\$ -	\$ -	\$ -
8409 - Janitorial/Sanitation	_____	\$ -	\$ -	\$ -	\$ -
8601 - In Council Printing	_____	\$ -	\$ -	\$ -	\$ -
8609 - Outside Printing	_____	\$ -	\$ -	\$ -	\$ -
9152 - Recognition -- Adult/Staff	_____	\$ -	\$ -	\$ -	\$ -
9153 - Recognition - Youth (Patches)	_____	\$ -	\$ -	\$ -	\$ -
9155 - Recognition - Units (Ribbons)	_____	\$ -	\$ -	\$ -	\$ -
xxxx - Program Charge @ \$1.50 per youth	_____	\$ -	\$ -	\$ -	\$ -
xxxx - In-Direct Overhead Costs (28%)	_____	\$ -	\$ -	\$ -	\$ -
xxxx - Contingency (10%)	_____	\$ -	\$ -		\$ -
Other: (Be Specific)	_____				
TOTAL EXPENSES:		\$ -	\$ -	\$ -	\$ -
NET INCOME OVER/UNDER EXPENSE:		\$ -	\$ -	\$ -	\$ -

DATE BUDGET CLOSED: _____

Expenses

	Date	Vendor / Name	PO #	Description	Individual Receipt Amounts	
8101 - Medical, Health & Safety Supplies					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
8103 - Program/Training Supplies					\$ -	
					\$ -	
					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
8104 - Food Supplies					\$ -	
					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
8106 - Office Supplies					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
8108 - Catering					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
8301 - Postage & Shipping					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>
8402 - Site/Facility Rental					\$ -	
					\$ -	
					\$ -	<u>\$0.00</u>

Date	Vendor / Name	PO #	Description	Individual Receipt Amounts	
8409 - Janitorial/Sanitation				\$ -	
				\$ -	<u>\$0.00</u>
8601 - In Council Printing				\$ -	
				\$ -	
				\$ -	<u>\$0.00</u>
8609 - Outside Printing				\$ -	
				\$ -	
				\$ -	<u>\$0.00</u>
9152 - Recognition -- Adult/Staff				\$ -	
				\$ -	
				\$ -	<u>\$0.00</u>
9153 - Recognition - Youth (Patches)				\$ -	
				\$ -	
				\$ -	<u>\$0.00</u>
9155 - Recognition - Units (Ribbons)				\$ -	
				\$ -	
				\$ -	<u>\$0.00</u>

REQUEST TO PURCHASE

DATE NEEDED: _____

VENDOR OR PERSON TO BE PAID: (Last, first) _____

ADDRESS: _____

CITY/ST/ZIP: _____

Email _____

ACTIVITY NAME

ACTIVITY DATE

Qty	Description	Unit Cost	Total	Account Number
		\$ -	\$ -	
		\$ -	\$ -	
		\$ -	\$ -	
		\$ -	\$ -	
		\$ -	\$ -	
		\$ -	\$ -	
		\$ -	\$ -	
		\$ -	\$ -	

Subtotal	\$ -
Tax . . .	\$ -
Shipping	\$ -
Total . . .	\$ -

Request: Check Purchase Order

- Handling Instructions for PO*
- Email to above address, Copy to DE
 - Fax to # _____
 - Give to:
 - Mail to above address, Copy to DE

Requester's Signature _____ Date _____

For Office Use:	

Staff Advisor	
_____	PO# _____
Approved By	

REQUEST FOR JOURNAL ENTRY

From: _____

Date: _____

Purpose / Explanation:

Account Number	Description	Debit (From)	Credit (To)

For Accounting Use Only

Batch Date _____

Batch Time / No. _____

Transaction Date _____

Verified By _____

Approved By _____

Processed By _____

White - Accounting, Canary - Department, Pink - Requester

PETTY CASH RECAP SHEET

COST CENTER # _____

Date: _____

Petty Cash Issued: \$ -

Budget Line	Date	Vendor & Account Description	Cost
1	_____	_____	\$ -
2	_____	_____	\$ -
3	_____	_____	\$ -
4	_____	_____	\$ -
5	_____	_____	\$ -
6	_____	_____	\$ -
7	_____	_____	\$ -
8	_____	_____	\$ -
9	_____	_____	\$ -
10	_____	_____	\$ -
11	_____	_____	\$ -
12	_____	_____	\$ -
13	_____	_____	\$ -
14	_____	_____	\$ -
15	_____	_____	\$ -
16	_____	_____	\$ -
17	_____	_____	\$ -
18	_____	_____	\$ -
19	_____	_____	\$ -
20	_____	_____	\$ -
21	_____	_____	\$ -
22	_____	_____	\$ -
23	_____	_____	\$ -
24	_____	_____	\$ -
25	_____	_____	\$ -

Receipts Total: \$ -

Cash on Hand: \$ -

RECEIPT RECAP

COST CENTER # _____

Vendor/ Volunteer _____

Date: _____

	Budget Line	Account Description	Cost
1	_____	_____	\$ -
2	_____	_____	\$ -
3	_____	_____	\$ -
4	_____	_____	\$ -
5	_____	_____	\$ -
6	_____	_____	\$ -
7	_____	_____	\$ -
8	_____	_____	\$ -
9	_____	_____	\$ -
10	_____	_____	\$ -
11	_____	_____	\$ -
12	_____	_____	\$ -
13	_____	_____	\$ -
14	_____	_____	\$ -
15	_____	_____	\$ -
16	_____	_____	\$ -
17	_____	_____	\$ -
18	_____	_____	\$ -
19	_____	_____	\$ -
20	_____	_____	\$ -
21	_____	_____	\$ -
22	_____	_____	\$ -
23	_____	_____	\$ -
24	_____	_____	\$ -
25	_____	_____	\$ -

Receipts Total: \$ -



GOLDEN EMPIRE COUNCIL
BOY SCOUTS OF AMERICA

Gift in Kind Donation Form

Name of Individual or Organization Making Donation			Date	
_____			_____	
Address			<u>For Office Use</u>	
_____			Project Sale _____	
City			Capital Campaign _____	
State			Camp _____	
Zip			Office _____	
_____			Activity _____	
Telephone Number			Special Event _____	
Email			District	
_____			_____	

Detailed List of Donated items, services, etc.	Value																
<table border="1" style="width: 100%; height: 150px;"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									<table border="1" style="width: 100%; height: 150px;"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>								
Donor Signature	Total Value																
_____	_____																

For Council Use Only

Project For	Staff Name
_____	_____
Income Account Number	Staff Signature
_____	_____
Expense Account Number	Approved By Council Management
_____	_____



Golden Empire Council Boy Scouts of America
 251 Commerce Cir
 PO Box 13558
 Sacramento, CA 95853
 Phone: 916-929-1417, Fax 916-929-4461
 www.gebsa.org

Event Evaluation and Closing Report

Name of Event: _____

Date: _____

District or Council: _____

Activity Chairman: _____

Staff Adviser: _____

Home Phone: _____

Attendance:	<u>Participants</u>	<u>Staff Attendance</u>	<u>Total Participation</u>
	Tigers _____	Key Staff _____	_____ 0
	Wolves _____	Other Adult Staff _____	
	Bears _____	Youth Staff _____	
	Webelos _____	OA Members _____	
	Boy Scouts _____	Council Staff _____	
	Varsity Scouts _____	Total: _____	_____ 0
	Venturers _____		
	Explorers _____		
	Adult _____		
	Total: _____		_____ 0

EXPLAIN ALL "NO" ANSWERS ON THE BACK OR ATTACH A SEPARATE SHEET

Evaluation of Facilities

- 1. Was the site appropriate for this event? Yes _____ No _____
- 2. Were there adequate health and safety facilities available? Yes _____ No _____
- 3. Was parking managed in a safe manner? Yes _____ No _____
- 4. Would you recommend this site for this event in the future? Yes _____ No _____
- 5. Was food service sufficient for this event? Yes _____ No _____
- 6. Was there adequate sanitation facilities available? Yes _____ No _____
- 7. Other (explain) _____

Program Evaluation

- 1. Was the program carried out as planned? Yes _____ No _____
- 2. Was the program well rounded to meet the needs of all participants? Yes _____ No _____
- 3. Was there a specific program for each level of the Scouting family in attendance? Yes _____ No _____
- 4. Should this program be repeated in the future? Yes _____ No _____
- 5. Did this activity conform to the proposed budget? Yes _____ No _____
- 6. Was the fee sufficient to cover the expenses as outlined in the budget? Yes _____ No _____
- 7. Other (explain) _____

Staff Evaluation

- 1. Was there adequate staffing for the attendance? Yes _____ No _____
- 2. Were additional positions for staffing needed that were not planned for? Yes _____ No _____
- 3. Was the staff in the appropriate uniform for this event? Yes _____ No _____
- 4. Would you recommend the same staff for future events? Yes _____ No _____
- 5. Other (explain) _____

Recommendations for Next Year: _____

If this event is to occur again, list potential event chairmen: _____