PROGRAM PLAYBOOK

YOUR GUIDE TO PLANNING & HOSTING AMAZING COUNCIL & DISTRICT PROGRAMS

BOY SCOUTS OF AMERICA

LONGHORN COUNCIL

Contents

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COUNCIL

Longhorn Council Facility Reservation & Calendaring Request

Event Name:

Event Date:

Event Sponsor:

(District Name, Council Committee)

Event Professional Partner:

Event Director:

Event Logistics Volunteer:

Location:

First Choice:

Second Choice:

If desired location is not a Longhorn Council Property, please indicate the location, address, and whether this is confirmed with the venue.

Specific Facilities and Activities Desired:

Please list all facilities and program areas you will need for your event. Please be specific.

Click or tap here to enter text.

For a list of facility rental fees and activities for your event, please see the Facility and Activities Fee Schedules for Camp Tahuaya, Sid Richardson Scout Ranch, Worth Ranch, and Hills and Hollows.

Do you wish to reserve campsites as well? If so, please identify the number of campsites required for your event.

Request as many as believed needed. Adjustments can be made later.

Has your Draft Budget been created and approved by your Event Key 3? Yes ☐ No ☐

Have you drafted a promotional sales blurb for your event? Yes ☐ No ☐

Have you designed the fee payment schedule for your event? Yes ☐ Yes ☐

Budget and Purchasing Procedures

Overview

The Longhorn Council is a multi-million business that operates through volunteers and employees to meet the mission of Scouting. Staff and Volunteers purchase services and goods to operate programs throughout the council. Budgets, Purchase Orders and Check Requests are the tools that the Longhorn Council, BSA use to provide volunteer and professional oversight and to grow the Scouting movement in North and Central Texas. The Longhorn Council, BSA must use its resources wisely to provide the highest quality of service to the youth and volunteers. We need your help to make sure that provide exceptional service and programs for the communities we serve.

Budget Procedures

The Longhorn Council, BSA requires that all activities have an approved Activity Budget and an After-Event Budget. Budgets are required before project codes and purchase orders can be issued. Recurring events using the same project code each year are required to submit a budget to the council board for approval.

What is needed to produce a budget for a successful activity or event?

- Calendar date submitted
- Event chair, logistics chair, staff partner
- Accepted venue (confirmed venue cost) – every event at a council property will have a cost – you will have exclusive use for only the campsites/facilities/program areas that you reserve.

Budgeting Timeline

1. Staff partners receive a budget template worksheet in May from the Longhorn Council accounting team to support your budget development for the next calendar years' activities and events.
2. Working with the event chair, the logistics chair, and the staff partner, a bottom-up budget should be built out to support a financially viable event. **What is a Bottom-Up Budget?** A bottom-up budget does not start at the price. It begins with meaningful estimates of expenses per person, adds in facility fees and any other fixed costs, then suggests a pricing structure that not only covers basic costs, but allows for unexpected contingencies or needs AND also allows a "pay it forward" return to Scouting that supports the efforts of the organization.
3. All budgets will include a 15% administrative overhead charge and a 5% charge for storage/program supply replenishment. These fees are not contingencies, but actual charges that need to be part of your budgets.
4. When budgets are prepared with the expectation that material or services will be donated, an attempt should be made to include those expenses in the budget and income should show donated "gifts in kind". The cost of an anticipated donated item should be figured into the budget in case the donation does not come through. When the item is donated it should be listed as a "gift in kind" and the value listed in the budget.
5. Activity and Event Fees should be built out with an early bird pricing discount for registrations 30+ days prior to the event.
6. Member and Non-Member pricing is needed for all events. Non-Member price is an additional 20% of base price & walk-in pricing is an additional 30% of base price.
7. Draft activity and event budgets are submitted to the Longhorn Council accounting team by way of the staff partner each year during the July/August timeframe for the next calendar year. These budgets are submitted to the council board for final approval.
8. Once approved, the event chair, the logistics chair, and the staff partner are responsible for monitoring the event to keep it within the approved budget.
9. After Event Close Out: All receipts and expenditures should be paid for or reimbursed by the end of the month following the activity of event. Turn in your receipts early to ensure they can be reimbursed.

Purchasing Procedures

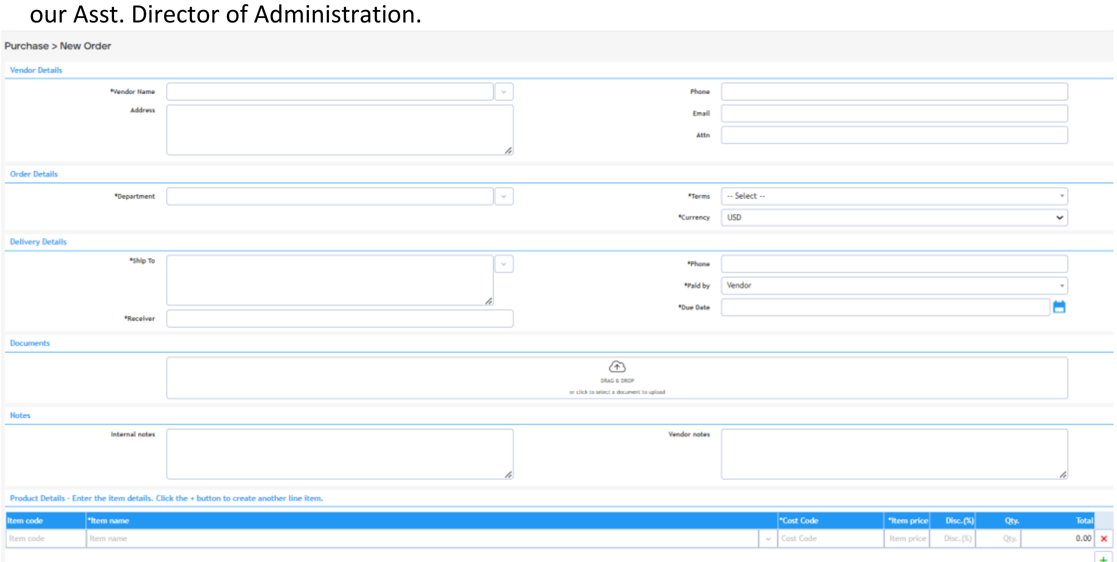
Items and services may be purchased by several methods. All purchases must be within the scope of an approved activity or event budget. Requests for purchases, ordering or cash by volunteers should be given to the staff partner, who will secure approvals, purchase orders, checks, cash, etc. It is not our intent to cause anyone employed by or volunteering for the Longhorn Council any hardship or personal liability. It is imperative that we utilize the below purchasing procedures to avoid any hardship being caused.

Purchase Order Procedures:

Purchase Orders are submitted **before a purchase is made** and is an approval for the estimated expense towards your activity or event. Secure an approved purchase order for all purchases before they are made. Purchase Orders are used in most scenarios, except in situations where a vendor will not accept a purchase order. Additionally, Purchase Orders MUST be secured when utilizing a council credit card.

The Longhorn Council utilizes PLANERGY, a purchase control software, to submit and approve purchases orders throughout the council. The activity or events staff partner will submit purchase order requests through PLANERGY for approval by their manager.

1. Collect the estimate of the expense, the company name and contact at the company and include their full contact information and address where they would like to receive the check.
2. Submit this information through your staff partner into PLANERGY, who will submit and secure managers approval for the Purchase Order. Staff Partners will need to know which account number/s will be utilized for this expenditure.
3. When a vendor is not listed in PLANERGY, the staff partner can request that the vendor be added. This will ensure that the correct contact and billing information is built in.
4. Once a Purchase Order is approved, the staff partner will receive an email, and the approved Purchase Order Number should be submitted to the vendor for ordering. Billing and receipts without purchase orders slow the payment process greatly.
5. Fill out a Purchase Order with the above info and have it approved by your supervisor via email and submit to our Asst. Director of Administration.



Vendors: Whenever possible, purchase supplies from a source that will accept Council charges. Invoices. Have all invoices made out to: Longhorn Council, Boy Scouts of America, PO Box 54190, Hurst TX 76054 & include the assigned Purchase Order Number.

Check Request Procedures:

Use a check request when the vendor requests payment at time of purchase and/or will not establish an account and accept a purchase order. Use a check request for unexpected miscellaneous expenses that are not anticipated. The amount should be very small. This is usually used to reimburse individuals and not businesses.

1. Collect Receipt, name of who is requesting the check and include their full contact information and address where they would like to receive the check.
    a. Name, Address, Phone Number, Email Address, Itemized list for reimbursement.
2. Fill out a Check Request with the above info and have it approved by your manager via email and submit to our Asst. Director of Administration.

CHECK REQUEST FORM

☒ Longhorn Council ☐ Boy Scout Foundation

PAYEE:		Date:
Amount	ACCOUNT #	
Address: City State: Zip:		
Requested by: **Purpose**:	Service Center Use Only:	
DISTRIBUTION INSTRUCTIONS Required When: Mail?		
Signed:	Approved:	Date:

Our Development Assistant will mail out the checks following approval and proper signatures from our Scout Executive. Check requests submitted by Wednesday at 10:00 a.m. are processed and generally available late Friday afternoon the same week.

Cash Advance Procedures: Cash advances may be granted when accompanied by an approved summary of items and their amount to be purchased. Cash Advances may be used ONLY to cover expenses authorized in the approved budget of an event, including incidental miscellaneous expenses (which should be in the budget).

Cash advances are requested using a check request. Cash Advances are reconciled through the staff partner by returning the total amount of the advance, itemized receipts spent, or the combination of both. Please note that processing Cash Advances is a lengthy process since they are not automated in any way. It is highly recommended that your event leadership seek out any cash advances 10 business days prior to the actual need.

Sales Tax: The Council is exempt from paying sales taxes. Tax exemption certificates can be obtained from an event's staff partner. These certificates should be supplied to the vendor at the time of purchase. Sales tax will not be reimbursed.

Patches, T-shirts, and Porta-Potties: Vendors for patches, t-shirts, and porta-potties have been established and contracted for council purchases. Staff Partners will place all orders for patch, t-shirts and porta-potty purchases. Orders should be planned and should be placed 8 weeks prior to the event to ensure supplies arrive on time.

Day of Event Change: Events needing cash for change should request a check 10 business days in advance. The total amount must be accounted for in cash returned or itemized receipts. If necessary, additional checks can be issued in the amount of receipts submitted.

Council Equipment & Facilities: Reservation requests for council program equipment and facilities that have a fee associated with them must be accompanied by a copy of the approved purchase order.

Rubric Backdater and Calendaring

Why do we use backdaters for our events?
A backdating calendar will assist the event chairman, the professional partner, and the event committee to keep on track for the event. It also helps ensure that items are ordered on time, materials are ready, and people are in place to make the event successful! A specific schedule should be created for each activity (a generic backdater has been created below). Make sure the schedule includes dates and locations of staff meetings so that the committee staff can plan their schedules accordingly.

Action:	Responsible:	Date Due:
Confirm Event Key Leadership: Event Chair, Event Logistics Chair, Professional Partner	Individual or Group with Concept for event or activity and Professional Partner.	April of Year Prior to Event
Facility Choices Selected/Priced. Selected first and second choices. Note: All activities related to Camp Tahuaya will need approval from Camp Tahuaya leadership)	Event Key 3. Selections are completed using the Facility and Calendaring form. Submitted to Professional Partner.	April of Year Prior to Event.
Complete NCAP Local Council Authorization and Assessment Declaration Part A to the council for approval and signature	Event Key 3. Submit to Program and Activities Director for Approval.	April of Year Prior to Event.
Recruit committee members.	Event Director and Event Logistics Chair.	Ongoing
1st Committee meeting and select themes/activities	Event Director and Event Committee	-180 (minimum)
Bottom-Up Budget Complete (Draft)	Event Director, Event Logistics Chair, Professional Partner	June of Year Prior to Event
Sales Sheet Written, promotion materials, and leaders guide created. Submit for approval from the staff leader.	Event Key 3 and Professional Partner. Professional Partner submits calendar package to Staff Leader.	June of year prior to Event
Create Blackpug registration page	Professional Partner	-120 (minimum)
Request Creation of Marketing Materials	Professional Partner	-120 (minimum)
Start promotion of activities(social media, Roundtable, District events, and unit visits)	Event Director and Committee submit sales sheet and all promotion materials to Communications and Marketing department.	-90 (minimum)
Additional volunteers recruited for the event. Recruit "Qualified Supervision" positions first. (Shooting Sports, Aquatics, Health, etc., anything needing special training or certifications.)	Event Logistics Chair and Committee. Reports progress to Event Chair.	-60

Purchase orders for program materials, portable toilet rentals, patches/T-shirts, and meals, LHC Program Trailer Reserved if needed.	Event Director Submits requests to Professional Partner with Documentation. Professional Partner processes Purchase Orders.	-50
Submit an order for patches and t-shirts to the appropriate vendor	Event Director Submits artwork and count to Professional Partner with estimate. Professional Partner processes Purchase Orders and Patch Order.	-45
Event committee walk-thru of the event location with Property Personnel or Site Personnel. A report of actions needed for the site is made to the Program and Properties Department.	Event Key 3 and Property Personnel (ranger, park director, etc.)	-30
Final event committee meeting	Event Director and Committee/Volunteers	-30
Purchase program supplies and food if needed	Event Chair and Committee/Volunteers (all purchases require prior approval by the Event Director.)	-14
Final meeting with event chair	Professional Partner and Event Key 3	-10
Event Set Up.	Event Director and Committee/Volunteers	0
Event Run	Event Director and Committee/Volunteers	0
Event Tear Down, Clean up and Store.	Event Director and Committee/Volunteers	
Circulate Feedback Surveys	Event Director and Professional Partner	
Report funds, submit receipts for approved expenses	Event Director and Professional Partner	
Complete Metrics Report	Event Director and Committee	
Evaluate Effectiveness of Event/Activity. Document Recommendations for improvement.	Event Director and Committee	
Complete Thank you Process!		14

Metrics for Events & Programs

Metrics: What you measure, you improve. Determining measurable outcomes during the planning stage will enable volunteers and professionals to recognize excellence or notice warning signs. For Longhorn Council, the following metrics are selected to establish excellence in all Longhorn Council events, whether conducted by LHC Professionals, youth or volunteers:

Mission Connection: Yes/No: Did the program accomplish its goal of positive youth impact?

Financial Impact and Cost Variance: at the end of the program lifecycle, what is the cost variance of your budgeted plan? Cost variances can be negative, positive, or zero. To determine cost variance, simply divide revenue by cost.

- Negative Cost Variance: Overspending of budget and/or revenue lower than expected.
- Zero Cost Variance: Spending happened exactly as planned (rare.)
- Positive Cost Variance: Underspending of Expenses and/revenue higher than expected.

Example 1:

Camporee expense budget: $6,500
Camporee Earnings: $7,100
Cost Variance = 1.09 [more than one=😊]

Example 2:

Camporee Expense Budget: $7,100
Camporee Earnings: $6,500
Cost Variance = .91 [more than one=☹]

Participation: Participation at or below expectation and by how much?

Feedback Results: Every event should have a feedback loop that has numerical measures. Do the results of the survey indicate success, potential success with improvement, or service failures? The LHC Survey Procedure can be found on page 9 of this document.

Camporee Evaluation Example 1:

Metric	Goal (Planning stage)	Result (close-out)
Mission Connection	Delivered the Fishing Merit Badge curriculum to youth	Yes
Cost Variance	1.0	1.75
Participation	300 Youth, 60 Adults	301 youth, 76 Adults
Feedback Results	Greater than 4 out of 5	4.65/5

Given the example results of the Camporee's Evaluation, this was a really solid result! This event is likely to grow and was very well managed!

Camporee Evaluation Example 2:

Metric	Goal (Planning Stage)	Result (close-out)
Mission Connection	Deliver the Fishing Merit badge to youth	Equipment failures (all the minnows and worms were dead and only 2 rods.)
Cost Variance	1.0	.09
Participation	300 youth, 60 Adults	76 youth, 160 adults
Feedback Results	4 or greater overall score	16 gave us a 5 (committee members) 120 gave us a 2

Based on these results, the committee and the professional partners have some decisions to make. With these results, it looks like adults were more interested than youth, the budget was overspent on t-shirts and patches, and the only people who liked it were the committee members. What should be done?

Having a set standard for metrics helps raise the bar for everyone.

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Longhorn Council Event Survey Procedures

This Standard Operating Procedure will take you s to create a consistent Google Form Survey suitable for all events in the Longhorn Council.

Step 1: Go to Google.com in the corner find the menu, scroll all the way down to the purple Google Forms icon. At the top under Start a New Form click the Blank button.

Step 2: Title your Survey for your event. Example Top Shot 2022. One line below, description should be "Satisfaction Survey".

Step 3: Header Picture. Here you can upload a Logo or title picture for your event.

Note: to fit in the header of the Google Form your Logo/ Picture must be no bigger than 1.45" x 6" If you need assistance with the creation of a header, please contact our Communications & Marketing Director.

Step 4: In the top right corner of your Google Form click the Customize Theme Button . Under Header Click Choose Image. Choose the Upload option and Browse your saved pictures and open the image. You will then have the option to crop your image to fit in the Header space. Note, if it does not fit, go back to Word, and resize your image.

Step 5: To format the questions, first click the Add Question button click 4 times, creating a total of 5 questions. Fill in the questions for each from the list of questions provided in Step 6. Next, the Google Form will default to Multiple Choice, click the button that says "Multiple Choice" and change it to Linear Scale. Questions 1-3 are Linear Scale format. Then, label what 1-5 means (Below in Step 6). From worst to best, 1 being worst 5 being best. Repeat for Questions 2 and 3.

In the Bottom Right Corner of each question box there is a switch labeled Required Required , click this once (it will change color) to make each question un-skippable by the user.

Step 6: There are only 4 standard questions that must be asked on a survey

- Question 1: How would you rate your overall experience? (Not a good experience) 1-5 (Great Experience)
- Question 2: How would you rate your customer service experience? (Poor Customer Service) 1-5 (Excellent Customer Service)
- Question 3: How likely are you to recommend this event to others? (Not Likely) 1-5 (Very Likely)
- Question 4: How did you hear about this event? Checkboxes
- Question 5: Any Comments, Suggestions or Feedback? Paragraph

Step 7: Question 4 is a Checkbox Format. After filling in the Questions and Labels for 1-3, you will Click Linear Scale and change it to "Checkboxes". You will create 8 options to choose from, you can add another line by clicking "Add Option" just below the first. The options to include are Website, Facebook, Newsletter, Advertisement, Word of mouth, Email, Phone and Other.

Step 8: Question 5 is a Paragraph format. Click the Multiple-Choice button and select Paragraph.

This question is optional for the user. Make sure the switch for Required is turned off for this question.

Step 9: The last step is to go to the setting in the top middle of the screen. Select the Responses Tab and click the Collect Email Addresses switch. This way if a survey needs to be resent or sent out twice, we know who has already responded.

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Event Marketing

Longhorn Council is dedicated to creating brand-positive marketing for all events. A strong marketing plan can drastically impact the success of your events. The primary content creation of our Marketing & Communications team is focused on large-scale, council-level events. The committees of these events should work through their staff partner to request the creation of marketing materials. Our team has a limited-capacity to assist with the creation of marketing assets for district-level events. In early 2023, we will be developing and organizing a variety of materials that will be available to districts to help them create their own marketing materials.

When marketing an event that happens annually, we recommend a 365 day approach to marketing. At a minimum, marketing should begin 90 days before the event. This means marketing materials must be requested a minimum of 120 days before the event. In some cases, additional time may be required.

Council-Level Event Marketing Materials & Recommendations:

- Detailed and engaging Blackpug registration page
- Logo development
- QR code creation
- Longhorn Council Facebook page event
- Event listing at LonghornCouncil.org
- Social media posts staring 90 days before the event
- Longhorn Council Newsletter stories (3 months before event, 1 month before registration closes, 1 week before registration closes)
- Print flyers
  - Give to District Professional Staff for distribution at Roundtables and events
  - Provide flyers to participants at events that take place before your event
- Paid online advertising: *must be included in event budget*
- Patch Design: *if your patch is different than your event logo, we recommend working with an approved company to design your patch. Request a digital image of the patch for inclusion in marketing materials*
- Image header for Post-Event Google Form Survey

District-Level Event Marketing Materials & Recommendations:

- Detailed and engaging Blackpug registration page
- QR code creation (we recommend using QR Code Monkey)
- Facebook Event on your District's page
- Social media posts staring 90 days before the event
- Inclusion in your district newsletter, if applicable
- Print flyers
  - Distribution at Roundtable
  - Given directly to units
  - Available at other District Events prior to your event
- Patch Design: *if your patch is different than your event logo, we recommend working with an approved company to design your patch. Request a digital image of the patch for inclusion in marketing materials*

During your annual/reoccurring events, it is important to capture pictures and video of participants in action. These assets will be crucial when developing marketing materials for the following year.

Longhorn Room Reservations at the Hurst Office through Outlook

Staff Partners for council events and committees can reserve rooms at the Hurst Office using their Scouting.Org Log in to Outlook and submitting a calendar request. This ensures that the room will be ready for your meeting, and that there won't be any scheduling conflicts with other groups wanting to use the same room. Calendar requests should only be submitted for times when a staff partner can be present OR when the office is open during normal business hours. This includes Saturday Meetings when the Scout Shop is open (9:00am to 3:00pm). You are not able to make recurring room reservations for more than 180 days out.

Creating a Meeting Request

- In Outlook, click "**Calendar"** in the bottom left corner, then click **"New Meeting"** on the ribbon.

Filling Out Your Meeting Request

- Fill out the meeting request as you normally would.
- Once you get to the location, click **"Rooms"** to the right.

Selecting a Room

- When the **"Select Rooms"** dialog first opens, it will show rooms for all councils in the BSA.
- To show just our rooms, you'll want to click the drop-down arrow under **"Address Book"**, then select our council.
- Once you find the room you want to reserve:
- Click the room in the list.
- Click the **"Room"**.
- Click OK.
- You will be returned to your meeting request.

Returning to the Meeting Request

- You should now see your meeting room listed in the To and Location fields.
- If you want, you can change the text in the Location field.
- For example, you could change "662 – Conf Rm 201" to "Hurst Office, Upstairs Conf. Room".

Using the Scheduling Assistant

- If you want to make sure that the room you selected is available before sending your meeting request, you can click "**Scheduling Assistant"**.
- Times when your room is already booked will be shown as Busy, in purple.

Finishing Your Meeting Request

- You can return to your meeting request by clicking **"Appointment".**
- When your meeting request is finished and you're ready it to go out, click "**Send".**

Meeting Room Response - Accepted

- Within a few minutes after you send your meeting request, you'll receive an email from the room letting you know if the request was accepted or declined.
- If there are no conflicts, your reservation will be accepted.

Meeting Room Response - Declined

- If the room has already been booked for that date and time, you'll receive an email from the room stating that your reservation was declined.
- You can change the time on your meeting request and resend it, and you'll receive an accepted response from the room if the new time is free.