

Troop 271 Event Planning Standard Operating Procedure (v2014.02.10)

It is important to standardize the process by which Troop 271 plans and executes Troop and Patrol activities. Please use (and help refine) the SOP provided below. The minimum lead time for planning an event is 4 weeks if no PLC approval is necessary, 6 – 8 weeks otherwise.

The events@troop271.com email list will include:

- Senior Patrol Leader (SPL) – Michael Siironen
 - Committee Chair (CC) – Lynne Bradley
 - Activities Coordinator (AC) – Rick Selby
 - Scoutmaster (SM) – Robert Feinstein
 - Website Administrator (WA) – Calvin Kuo
 - Troopmaster Master (TM) – Julie Scull
 - Troop Equipment Coordinator (TEC) – Chuck Setzler
 - Medical Forms Administrator (MFA) – Kelsey Feinstein
 - Troop 271 ASMs – T271_ASMs@GoogleGroups.com
1. Write up a title, date, location, directions and description of your event, even if preliminary.
(We will try to set up an on-line form for submitting these.)
 2. Recruit Lead Scout and Lead ASM – they “own” the activity, will attend the activity, are responsible for planning and organizing the effort, and can make executive decisions in order to keep things moving. If unable to secure Lead ASM, contact the SM. The SPL is by default the Lead Scout for all Troop activities, but he is encouraged to delegate the role to others (e.g. ASPLs). All events, even Patrol events, must have a Lead Scout and a Lead ASM. Together they are referred to “Leads.”
 3. Submit the write up and Leads to events@troop271.com. Include any separate waivers or permission forms required for the activity (such as release of liability, permits...). Upon submission:
 - a. SM and CC will approve (or follow up regarding) event with Leads & SPL.
 - b. SPL decides if event was PLC pre-approved, or requires PLC approval, or approves w/o PLC. If PLC approval is sought, SPL and SM add event to agenda for next monthly PLC meeting.
 - c. AC reviews the details of the event write-up with Lead ASM and gets any additional information required for the event signup and flier.
 - d. AC prepares event flier (description + consent form + waivers/etc.) and signup sheet, sends to events@troop271.com, Lead ASM and Lead Scout.
 - e. WA adds event to Troop271.com calendar, and adds flier and other files for download.
Note that Consent forms will be sent out via e-mail and will be downloadable.
 - f. Lead ASM makes necessary reservations and fills out on-line tour permit form.

4. Signup Sheets:

- a. Signup sheets will include the event date/time/location, Lead Scout and Lead ASM (i.e. who to ask questions), and blank rows for each participant to fill out their Name, S/L/P (is Scout, Leader, or Parent), Consent in?, Money paid? and Seatbelt# (if willing to drive).
- b. During the first 15 minutes of each Troop meeting, event-specific signup sheets (on envelopes) will be at the activity table. Completed consent forms are to be placed in the envelope. Cash (only, unless >\$100) or check should be attached to completed consent forms.
- c. Signup sheets for each event will be maintained by the AC who will send a list of signees to Lead ASM upon request. Ideally the AC can scan all the signup sheets (not the consent forms) into one pdf and send it out to events@troop271.com so we all have a copy of the most current signup sheets. The AC handles the money and consent forms until signups close 2 troop meetings prior to the event.
- d. Signups for events close 2 Troop meetings before the event so we have a final head count and cash on hand for distribution to those tasked with pre-event purchases (e.g. food).

5. Lead ASM needs to:

- a. Direct Lead Scout's efforts to promote event and finalize scout signups.
- b. Work with Lead Scout on itinerary / agenda for event, including packing checklists (e.g. which to use, special instructions, etc.).
- c. Ensure commitment of at least 1 more adult (2-deep leadership). Two more are best.
- d. Coordinate transportation (i.e. drivers, and distribution of scouts among vehicles).
- e. Review "drivers database" to get vehicle info for tour permit. (Need to set up ASM portal.)

6. Two Troop meetings prior to event, the Lead ASM and Lead Scout do the following:

- a. Notify Troop Quartermaster (QM) re: any equipment needs, and arrange for equipment pick-up / drop-off (at next troop meetings, or as per other arrangements).
- b. Close signups, finalize attendee list and prepare money for distribution. AC turns signup sheet and consent forms over to Lead ASM who finalizes attendee list.
- c. Lead ASM sends final attendee (and drivers) list to events@troop271.com.
- d. Lead ASM fills out on line Tour Permit, sending AC an electronic copy. Instructions: <http://www.sdicbsa.org/Resources/Docs/TourPlanPolicy0412.pdf> (w/ link to permit file).
- e. MFA reviews medical form status of all participants, notifying those lacking current forms.

7. One troop meeting prior to event:

- a. MFA provides to Lead ASM medical forms binder (with summary) covering all participants.
 - b. Lead ASM reviews medical binder summary and compares medical forms to consent forms (with particular attention on current medications and food allergies).
 - c. Troop Equipment Manager and Troop QM distribute equipment as per arrangements.
 - d. Participants confirm event agenda and details, do meal planning, assign Grubmaster (who receives money, cooler, food bin, etc.), decide on tent buddies and make duty roster.
 - e. Lead ASM supervises meal planning and advises all (esp. Grubmaster) of allergy issues.
 - f. Leads check weather forecasts, trail conditions, water availability, etc.
8. Go for it! Tally attendees. Take notes and pictures. Have fun.
9. Upon return:
 - a. As per duty roster, scouts take home and clean equipment, bring it back at next Troop meeting for inspection (by Patrol QM and Troop QM) and check-in.
 - b. Lead ASM returns medical forms binder to MFA or SM.
 - c. Lead ASM and Lead Scout write up a summary of how the activity went, what worked, what didn't, and what they would do differently if they were to do it again. No last names. (We may set up an on-line form for this as well, and will involve the Troop Historian.)
 - d. Lead ASM and Lead Scout get participants' pictures to WA for posting on Troop271.com.
 - e. Lead ASM notifies Troopmaster Master of attendees, nights camped, miles hiked and hours in the water for each participant.
10. Lead Scout to present details of their activity to the Troop at a meeting soon thereafter.