

Girl Scouts of San Francisco Bay Area  
Coyote Hills Girl Scout Association

# Event Planning Packet

Included in this packet:

➤ Definitions	Definitions of terms/titles commonly used in event planning
➤ Event Guidelines	Read before you start planning your event!
➤ Event Request Form:	Present to ACT <b>3 months prior*</b> to the event for approval
➤ Event Checklist:	Use as a guideline for coordinating your event
➤ Event Budget:	Present to ACT <b>3 months prior*</b> to the event for approval
➤ Event Timeline Worksheet:	Use as a worksheet for your purposes only
➤ Event Flyer Guidelines and Sample Flyer	Present to ACT <b>3 months prior*</b> to the event for approval
➤ Event Site Checklist:	Helps you to remember to check Safety-Wise
➤ Event Evaluation Form:	Use as a guide to creating an evaluation form for your event Remember to include in your Event Binder
➤ Items not included in this packet, but may be needed:	<p>Girl and/or Adult Health Forms</p> <p>Insurance - available through council. You should have the Insurance Coverage Form and Pamphlet with you during the event and carry an Incident/Injury Report Form (811X)</p> <p>Permission Slip (413X)                      Safety Wise</p> <p>Press Release                                      First Aid Kit</p> <p>Trip Approval Form (52X)                      Appropriate Training</p> <p>Request for Fundraising Form (300X)</p>
➤ Event Binder	Return all information to ACT within <b>4 weeks after</b> the event. Turn in all planning, contacts, financial data, budget and summary of evaluations in a binder or any other organized manner. If you would like to keep any information, copy it for yourself before turning it in. The reason for this is so that future events can take place without the need to re-invent the wheel. This also ensures that we have an accurate record of how previous events have been handled.
➤ Reimbursement form	Reimbursement form to receive monies from treasurer

**Events are when more than two troops gather.**

**Thank you for coordinating this event!** We hope this packet has helped you organize your event.

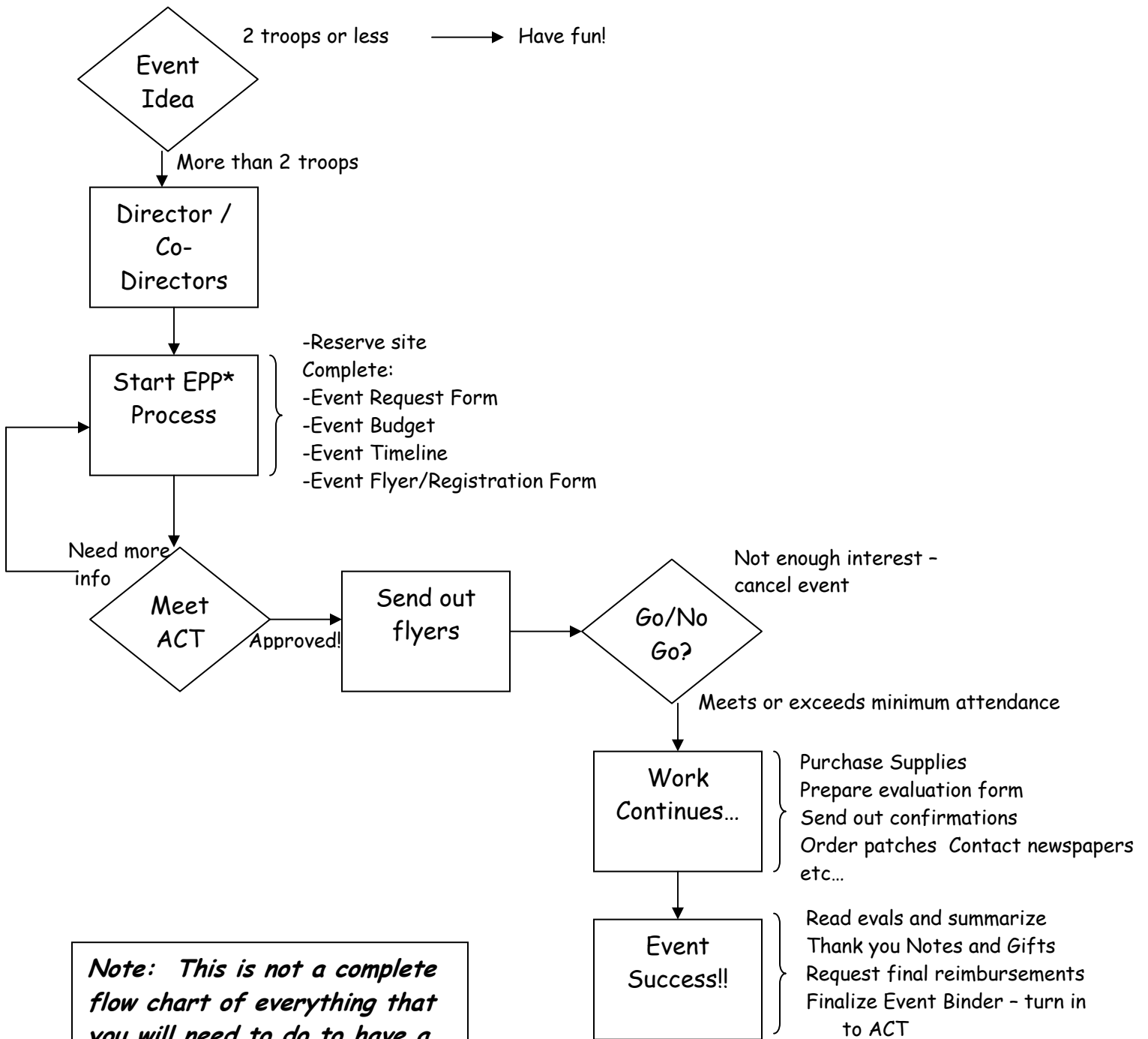
\* Coyote Hills ACT meets on the 2<sup>nd</sup> Thursday of the month. Contact the Association Coordinator to get on the agenda. If necessary, you may obtain ACT approval outside of the normal meeting time. It is your responsibility to obtain approval from ACT. If you can't attend the ACT meeting, contact the Association Coordinator.

Girl Scouts of San Francisco Bay Area  
Coyote Hills Girl Scout Association

## Definitions

<i>ACT</i>	<u>A</u> ssociation <u>C</u> oordinating <u>T</u> eam. Meetings are held the 3 <sup>rd</sup> Thursday of each month.
<i>Administrator</i>	Responsible for staff, staff training, and paperwork for event (i.e. staff evolutions, event packet, event evaluation).
<i>Bronze/Silver/Gold</i>	If your project fits the definition of an Event, you must present your Event packet to ACT for approval. ACT approval does not imply council approval for your Bronze/Silver/Gold Award project.
<i>Co-Director</i>	Person who is responsible for assisting director
<i>Director</i>	Person who is responsible for overall event. Oversee planning of program, staff development, staff management. Director and Administrator may act as one.
<i>Event</i>	(for the purposes of this event packet) Any activity in which more than two troops are participating or monies will be collected
<i>Event Treasurer</i>	Person who is responsible for approving expenditures for the event
<i>First Aider</i>	Certified Level 1 or 2 (see Safety Wise for more information)
<i>House Mother</i>	Person who is responsible for a "house" at an event site. This person would need to ensure that house rules are observed and that the required cleanup has been performed at the end of the event so that the deposits are returned. There could be additional duties that would be outlined by the director/co-directors.
<i>Kitchen Staff</i>	People responsible for food preparation, kitchen cleanup and dishwashers
<i>MDD</i>	Membership Development Director - only when using a certified dining facility
<i>Mailing Addresses</i>	Contact MDD
<i>PAs</i>	Girl Scout Cadettes and Seniors who have completed Program Aide Training. May or may not be a requirement for working an event.
<i>Patrol or Unit Leader</i>	Person responsible for a patrol or unit. Duties to be outlined by director/co-directors.
<i>Registrar</i>	Person responsible for the registration of the event. This would include, but not be limited to, collection and deposit of event fees, compiling and mailing confirmation packets, collecting and verifying trip approvals, girl and adult health forms, etc.
<i>Program Specialist</i>	Persons asked to assist at an event station. (Remember to include them on your thank-you list!)

# Event Flow Chart



**Note: This is not a complete flow chart of everything that you will need to do to have a successful event. This is only intended as a visual aide of the over all process.**

\* EPP - Event Planning Packet

Girl Scouts of San Francisco Bay Area  
Coyote Hills Girl Scout Association

## Event Guidelines

The following guidelines were developed to enable event directors to put on successful and enjoyable events:

- By providing as much advance notice as possible for leaders, girls and parents
- By providing accurate information to participants, with a goal of delivering events and programs as promised with no last minute changes or cancellations
- By using an evaluation process to discover ways to improve future events

Event Director (or person designated by Event Director) must attend an ACT meeting to present their proposed event at least **3 months prior** to the event date. You may want to check the date with the Association Coordinator prior to continuing.

The director should bring to the ACT meeting:

▪ Copy of completed Event Request Form	▪ Copy of completed Event Budget Worksheet
▪ Copy of Event Timeline	▪ Copy of Request for Troop Fundraising (if a fundraiser)
▪ 12 copies of the event flyer	

The coordinator should keep the ACT apprised of progress, concerns, attendance projections, program development and that all Safety-Wise requirements have been met. Submit to Association Coordinator for ACT update.

*Why should you complete this packet?* By using the Event Planning Packet you are ensuring that you are meeting GSSFBA Safety Wise requirements. Also, this packet attempts to outline many areas that can be overlooked by the novice event planner and can act as a memory jogger for the experienced event planners.

*Fast Track - For Events with no fees, all participants are registered adults and girls, the event is a single day (no overnight) and no flyer required, you will only need to complete the Event Request Form and submit to ACT for approval.*

*Budgeting Planning - When planning your budget don't assume that you will reach your maximum capacity. You need to plan your budget based on a minimum number of attendees. The planning committee is responsible for any financial short falls.*

*Fee Exemptions - When planning your budget, be aware that the following association guidelines are in place:*

- ❑ For all girl fees & non-adult fee events (adults that don't pay-such as day camp) that are 2 or more days, the following volunteers and their children are exempt from fees:
  - Director (s)
  - Co-Director (s)
  - Registrar
  - Administration
  - Kitchen Staff (only when using a certified dining facility)
- ❑ For all girl fees & adult fee events (adults pay) that are 2 or more days, the following volunteers are exempt from fees:
  - Director (s)
  - Co-Director (s)
  - Registrar
  - Administration
  - Kitchen Staff (only when using a certified dining facility)
- ❑ For ALL events under 2 days, every participant pays the full fee.
- ❑ All girl staff NOT participating in program activities is EXEMPT from fees.
- ❑ For any event, all girl staff/participants may PURCHASE any optional, non-required accessories.
- ❑ Financial aid and opportunity funds are available.

Girl Scouts of San Francisco Bay Area  
**Coyote Hills Girl Scout Association**

### **Deposits/Reimbursements**

- Funds received for the event must be handed off to the Association Treasurer in a timely manner. Contact the Treasurer for a convenient time to get together. It helps to be ready for the meeting - money counted, checks listed, items detailed. Don't forget to keep a copy for yourself.
- Each event should have an Event Treasurer. This makes the Association Treasurer life easier to have a focal point for each event.
- To receive reimbursements complete the Reimbursement Form. Be sure to include details on purchase and receipts.
- All checks should be made payable to Coyote Hills Association
- Reimbursements cannot be given until monies have been collected.
- Advances may be available in special circumstances. Discuss this with the ACT.

### **Fundraising Events**

All events intended as fundraisers must be approved by the ACT and must clearly be identified as such on the Event Request Form, on the flyer or any correspondence concerning the event.

#### *Troop fundraising guidelines*

Some troop fundraising activity may not meet the definition of an "event". For example, an activity involving the general public, such as a booth at a street fair. In this case, checks should be made out directly to the troop fundraising event. Event Director must submit a "Request for Troop Fundraising" form to their Service Unit Director (SUD). Troop leaders must include this income on the "Troop Financial Report" at the end of the year. Council policy states that troops may not hold fundraisers unless they participate in both product sales.

#### *Handling Funds*

All events involving more than two troops must be processed through the Association Treasury. Checks for these events need to be made payable to Coyote Hills. The final budget report, including receipts and invoices must be submitted to the Coyote Hills Treasurer no later than four weeks after the event. If this deadline cannot be met, the Event Director should contact the Association Treasurer immediately. If the event ends with a balance of funds, the final budget report should specify what it would be used for. **ANY RECEIPTS RECEIVED LATER THAN 4 WEEKS WILL NOT BE PAID!**

#### *Cancellations:*

Have a plan for canceling the event. What if it rains? Low enrollment? What if someone needs to cancel? Your plan doesn't have to be included in the flyer but it needs to be documented.

Girl Scouts of San Francisco Bay Area  
Coyote Hills Girl Scout Association

# Event Request Form

Event: \_\_\_\_\_

Theme: \_\_\_\_\_

Date: 1<sup>st</sup> Choice \_\_\_\_\_

2<sup>nd</sup> Choice \_\_\_\_\_

3<sup>rd</sup> Choice \_\_\_\_\_

Location: \_\_\_\_\_

\_\_\_\_\_

Time: \_\_\_\_\_

Projected Cost: \$ \_\_\_\_\_ (Submit Budget)

Advanced Funds: Yes / No If yes, how much? \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Will there be any one exempt from fees? If so, list names:

Director \_\_\_\_\_

Co-Director \_\_\_\_\_

Registrar \_\_\_\_\_

Kitchen Staff \_\_\_\_\_

Administrator \_\_\_\_\_

Comments:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Girl Scouts of San Francisco Bay Area  
Coyote Hills Girl Scout Association

## Event Checklist

*This is to be used as a guideline. Your Event may not need all of these items and you may need additional items.*

### 3-4 Months Prior to Event

- Come up with Event theme and location
- Choose an Event Coordinator
- Consult Safety-Wise for safety requirements
- Adult / Child ratio: \_\_\_\_\_ / \_\_\_\_\_
- Name of First Aider: \_\_\_\_\_ (check Safety Wise to determine level)
- Reserve Site                       Event Request Form                       Event Flyer
- Estimated Budget                       Event Timeline
- Event representative must attend the Coyote Hills ACT meeting. See Step 1 of the Event Guidelines for details
- Mail Event flyer
- Order non-member insurance through Council offices
- Contact various organizations for donations (ice-cream, gifts, etc) if appropriate
- Follow up donation requests in writing on GSSFBA letterhead - send letter request to MDD

### 2 Months Prior to Event

- Decide on patch style for Event (Custom or Stock)
- Order/purchase event supplies (including office supplies - name labels, pens, tape...)  
Don't forget to check the shed!
- Event go / no go?
- Prepare confirmation packets

### 1 Month Prior to Event

- Order Event patches
- Send confirmation packets to attendees. Include address of site, directions, map, times, health forms, permission slips, emergency contact information, what to bring. Is a Personal Conduct Agreement needed?
- Have received confirmation on all supplies and donations
- Prepare Event Evaluation Forms for the Event

### 1 Week after Event

- Write thank-you notes to those who helped sponsor the Event
- Write thank-you notes to those who helped with the Event
- Create Event Contact List to assist the next person coordinating this Event
- Request final reimbursement of funds
- Finalize Event binder and turn over to ACT

Girl Scouts of San Francisco Bay Area  
Coyote Hills Girl Scout Association

## Event Budget

Event Name: \_\_\_\_\_ Date: \_\_\_\_\_

Prepared by: \_\_\_\_\_

Position: \_\_\_\_\_ Phone: \_\_\_\_\_

Attendance: Girls \_\_\_\_\_ Adults \_\_\_\_\_

Income	Estimated	Actual
Girls _____ x \$ _____ =		
Adults _____ x \$ _____ =		
Donations		
Total Income:		
Expenses	Estimated	Actual
Site Rental		
Printing		
Mailing Label Printing	\$5.00	
Postage		
Office Supplies		
Decorations		
Program Supplies		
Food		
Patches		
Housekeeping Supplies		
Recognitions / Thank you's		
Toilets		
Insurance		
Older Girl Recognition Fund Attendees _____ x .25 =		
General Fund Attendees _____ x .25 =		
Other		
Total Expenses:		

Balance \$ \_\_\_\_\_

To be used for: \_\_\_\_\_

- Estimated budget must be turned in to ACT 3 months prior to Event.
- Completed Budget must be turned in to Association Treasurer no later than 4 weeks after Event.
- Left over funds that have not been designated for a specific use will be rolled in to the General Fund.

NOTE: Do not plan the event budget based on full participation. You need to plan for a minimum number. This will represent a "break even" point for the event and will help you in determining if the event needs to be cancelled due to low enrollment.

Girl Scouts of San Francisco Bay Area  
Coyote Hills Girl Scout Association

# Event Timeline

Event Name: \_\_\_\_\_

Date: \_\_\_\_\_

Director: \_\_\_\_\_

Phone: (    ) \_\_\_\_\_

Co-Director: \_\_\_\_\_

Phone: (    ) \_\_\_\_\_

Job	Owner	Date Needed	Completed
Site reservation			
Event Request Form			
Event Budget			
Event Timeline			
Request for fundraising			
Flyer and Registration form			
Develop program activities			
Schedule of activities for event			
Patch design and order			
Purchase program supplies			
Reserve equipment			
Event go / no go?			
Pick-up equipment			
Information due for event packet			
Assemble event packets			
Distribute event packets			
Develop evaluation for event			
Future meeting reminders			
Evaluation meeting			
Final budget completed			
Event notebook for next director			
Recognitions and "thank yous"			

Girl Scouts of San Francisco Bay Area  
Coyote Hills Girl Scout Association  
**Event Flyer Guidelines**

- ❑ On the top of the page, spelled out, not abbreviated, should be this heading: (It's OK to use a small font - but no smaller than 10pt and must be in Times Roman)  
    Girl Scouts of San Francisco Bay Area  
    Coyote Hills Association
- ❑ Event name
- ❑ Date
- ❑ Time - beginning and ending!
- ❑ Location
- ❑ Cost
- ❑ Brief description of what will be offered
- ❑ Cancellation policy
- ❑ Note that Event packets will be sent at a future date (if you are sending these out)
- ❑ Event Coordinator's name and telephone number
- ❑ If fees are collected, a note that they can apply to the Council Opportunity Fund for assistance and to make the check out to "Coyote Hills Association" along with a note that there will be a \$10 returned check fee.
- ❑ Registration deadline
- ❑ Safety Wise ratio info

On the detachable registration portion:

- ❑ Where to send the registration
- ❑ Space for:
  - Name
  - Email address
  - Address
  - Phone number
  - Troop #
  - Amount paid
  - Who to make check payable to (Coyote Hills Association),
- ❑ If food will be served, space to note any dietary restrictions
- ❑ If overnight event, buddy request

See attached example.

These guidelines apply to email messages also.

*Please "be a sister to every Girl Scout" when extending invitations.*



Girl Scouts of San Francisco Bay Area  
 Coyote Hills Girl Scout Association  
 Coyotehillsgs.org

## Sample Event Flyer

When: October 13, 5pm through October 15, 10am  
 Where: Camp Girl Scout  
 Cost: \$ xx.xx

Description of your fantastic event.  
 What's included for the price?  
 What can they expect to do, experience?

Fun, fun, fun!!!

Detailed information packets will be sent upon receipt of registration. Cancellations will not be accepted.

Space is limited! Registration deadline is October 1, 2002. Financial aid is available from Council upon request.

Questions: contact the Supreme Event Director at (510) Who-Cares

---

Please detach this portion and send with your payment to: (name of event) Registrar  
5555 Volunteers Too Much Way  
Fremont, CA 94536

Name \_\_\_\_\_ Troop # \_\_\_\_\_  
 Email \_\_\_\_\_ Zip \_\_\_\_\_  
 Address \_\_\_\_\_

Amount Paid \$ \_\_\_\_\_ Dietary Restrictions: \_\_\_\_\_

Make checks payable to Coyote Hills Assoc Food allergies? Yes / No Vegetarian? Yes / No  
 There will be \$10 returned check fee.

We can't promise, but is there someone you would like to room with? \_\_\_\_\_  
*Please include a self addressed stamped envelope.*

## Event Site Check List

When evaluating sites for your event consider the following:

### Location

- Is it a long drive?
- Is it difficult to find?
- Is it centrally located to the participants?

### Parking

- Is there a fee for parking?
- Is there adequate parking for your event?
- Do parkers need a pass?

### Fees

- What is the cost of the site?
- Deposit required?
- Is it in the budget?
- Will anyone be excluded from participating because of the event fee? Remember opportunity funds...

### Space

- Is the site big enough for my needs?
- Is there adequate space for headquarters and first aid station?
- Is there adequate space for headquarters and first aid station?
- Can the activities be centrally located on the site?
- How many can the site hold? \_\_\_\_\_
- What types of areas are needed to perform the activities?

### Barriers

- Is the site wheelchair accessible?
- Is the site walk able for those participants with disabilities?
- Can the hazards be eliminated or marked?
- Are there areas of the site that will be off-limits because of hazards?

### Physical Hazards

- Walk the site and note all possible physical hazards (i.e. lake or river).
- Do you have a plan to secure the site while the girls are present?

### Communication

- What types of areas are needed to perform the activities?
- Telephone on the site? Will cell phones work?
- What are the emergency phone numbers?
- Does everyone know where it is?
- Do you have a warning or alarm system for your event?

### Security

- Is the site accessible to the public?
- Do you have a plan to secure the site while the girls are present?

### Power Sources

- Is there electricity available?
- Will you need extension cords, adapters or generator?

### Trash Disposal

- What steps will you take to recycle as many waste items as possible?
- Are there adequate trash receptacles?
- Who is responsible for disposing of trash at the end of the event?

### Toilets

- Do all toilets meet state health standards of construction, maintenance and cleanliness?
- Have provisions been made to accommodate women and men?
- A least 1 toilet for every 30 persons?
- Have the facilities been designed to accommodate people with physical disabilities?
- Are toilets fly-tight and well ventilated? Are they partitioned for privacy?

### Water

- Is water readily available for all participants?
- What is the water source?
- Is there an adequate supply for participants?
- Is it drinkable?

Girl Scouts of San Francisco Bay Area  
Coyote Hills Girl Scout Association  
**Event Evaluation Sample**

*Please circle your response*

- |   |     |    |
|---|-----|----|
| 1. Did you enjoy this event?                                  | Yes | No |
| 2. Were you pleased with the facilities?                      | Yes | No |
| 3. Do you feel that this was a timely month for this event?   | Yes | No |
| 4. Should all age levels be able to participate in the event? | Yes | No |

If no, why? \_\_\_\_\_

- |  |     |    |
|--|-----|----|
| 5. Did you receive enough information about the event?                 | Yes | No |
| 6. Did you have enough time to register?                               | Yes | No |
| 7. Do you feel this event was priced fairly?                           | Yes | No |
| 8. Would you like to be involved in planning this event in the future? | Yes | No |

Name: \_\_\_\_\_ Phone: \_\_\_\_\_

9. Comments and Ideas:

---

---

---

---

## Now where do we go and what do we do?

Now that you know all there is to know about completing an event packet what kind of an event shall you plan? Here are some ideas, but by no means are these all the ideas. Let your imagines run wild!

Backpacking  
Brownie Fun Days  
Camping  
Day Camp  
Disneyland  
Juliet Low Birthday Celebration  
Mom and Me Event  
Older Girl Weekend  
Thinking Day Celebration  
Safety Faire

Bronze, Silver or Gold Award Project

Service Unit or Association Dinner  
Service Unit or Association Dance  
Service Unit or Association Ice Skating  
Service Unit or Association Picnic  
Service Unit or Association Party

Don't forget to check *Safety Wise* and the *Counsel Resource Book* for appropriate training and further information.

Remember, an event is when more than 2 troops come together or money is being collected or fundraising will occur.