# Introduction

The *Events checklist* is a planning tool and provided to support the events/activities approval process. Refer to the *Approval of events/activities* document (2.02) for further details.

***The key purpose of the checklist is to help deliver a safe, enjoyable, relevant, and high quality event/activity.***

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| **Key points to be considered before seeking approval from CMT** |
|  | * Has the proposed event/activity been agreed with your CMT line manager?
* Is the proposed event/activity ‘youth shaped’?
* Is there a programme need and purpose for the proposed event/activity?
* Does the event/activity map onto the current County plan/vision?
* Does the event/activity provide an appropriate programme?
* Are there sufficient and appropriately skilled leaders to plan, lead, and deliver the event/activity?
* Do the proposed leaders and other adults involved in the planning of the event/activity hold a valid DBS and are up-to-date with mandatory training (Safety, GDPR, Safeguarding, and First Aid).

[*Note: these requirements need to remain valid through the life of the event/activity (including planning, training and delivery). This is also a requirement for all leaders recruited at a later stage in the planning process*]* Are there sufficient First Response certificate holders involved in the event/activity?
* Are there sufficient activity permit holders (if required) for the event/activity?
* Is there sufficient time to plan and promote the event/activity?
* Is there a sound budget and cash flow management plan in place?
* Does the estimated cost represent good value to participants?
* Is there an initial and ongoing health and safety risk assessment regime in place?
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| Consideration of the above *key points* should be sufficient to help make a decision whether or not to proceed with a submission to CMT. Some events/activities may be required by CMT to have the additional approval of the CEC.Early submission via the *Events Approval* online form is encouraged.**Promotion of the event/activity must not start until CMT approval has been obtained.** |

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| The remainder of this *checklist* should be used to help with the planning of the event/activity and should form the basis of ongoing and regular reviews by the event/activity leader and CMT line manager. |
| **event/activity** | * Does the event/activity have an appropriate name/title?
* *Proposed dates of the activity?*
* Confirm dates of the activity
* *Proposed venue/location of the activity?*
* Confirm venue/location of the event/activity
* *Outline/draft programme*
* Confirm programme
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| **leadership** | * Does the event/activity leader have the appropriate experience with relation to the management and leadership of this type of event/activity?
* Is a Deputy Leader (or Leaders) in place for the event/activity?

[*must be able to lead the activity if the leader is not available*]* Are sufficient leaders in place to make a full management/leadership team?
* Does the leadership/management team include young people (‘youth shaped’)?
* Have role descriptions been put in place for members of the management/leadership team?
* Is there a need for ‘specialist’ (and or external) leaders?

[*eg: qualified instructors with appropriate permits/qualifications*]* Are there any skill shortages that put the management and running of the event/activity at risk?
* Where use is being made of external centres and/or instructors, have leaders considered the requirements of PO&R 9.9
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| **participants** | * Is the defined age group of the participants appropriate for the event/activity?
* What are the target numbers for participants (minimum and maximum)?
* What is the target date for minimum numbers?
* What are the plans if there are fewer than the minimum numbers by the due date(s)?

[*eg: cancel, or re-budget, or re-plan?*]* What are the plans if there are greater than the maximum numbers by the due date(s)?

[*eg: refuse additional applicants, or re-plan?*]* What plans are in place to make sure that young people have the opportunity to take part in the organisation of the even/activity and that their views can genuinely influence decision making?
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| **organisation** | * Is there a clear management structure for the event/activity?

[*ie: how do all leaders fit in the management structure of the event/activity?*]* What are the key dates/activities involved in planning the activity?

[*timeline*]* Are the relevant rules in PO&R known and understood by all leaders?

[*check all latest requirements, including activity rules, safety, insurance, etc, and discuss with ACCs (Activities) & (International) and other appropriate persons*]POR is available online at: <http://members.scouts.org.uk/supportresources/71/por?cat=419,480>* If the event/activity is abroad, has the ACC (International) been contacted and has the PC (International) and other relevant documents been completed?
* Have the regulations/requirements of the country been researched?

[*eg: visas; inoculations; driving regulations; permissions; customs; etc*]* Are there correct Nights Away permits and Activity Notifications for running the event/activity in place, including for participants if they are camping away from the main party?

[*contact the ACCs (Activities) & (International) for further help and guidance*]* When are the key (‘go’ or ‘no go’) decision points for the event/activity?
* Who will be involved in the key decision of ‘go’ or ‘no go’?
* Is there a mechanism in place for cross-checking critical parts of the planning?

[*eg: finances; travel; etc*] |

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| **publicity and promotion** | * How will the activity be promoted amongst potential leaders and participants?
* How will the activity be used to obtain good and positive publicity for Scouting?
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| **research and planning** | * Will reconnaissance trips be required; when will they be needed; who will attend?
* How will the reconnaissance trip/s be funded?
* What information relevant to the organisation of the activity will be required from the reconnaissance?

[*where, when, and how will it be obtained?*]* Does the reconnaissance comply with PO&R and the event/activity guidelines?
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| **risk assessments** | * Have full risk assessments been carried out for the event/activity?
* Have risk assessments been shared/discussed with the CMT line manager of the event/activity leader?
* How are risk assessments shared with relevant leaders and participants?
* Is the HQ and insurance reporting procedure known and understood for any incident, injury, or accident requiring **external** support (eg: medical help; emergency services; etc)?
* Is an experienced InTouch (Home Contact) team in place?
* Does the InTouch (Home Contact) team have all the relevant contact and itinerary details?
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| **objectives** | * Are the event/activity objectives clear; concise; and achievable?

[*Note: the objectives should be the criteria for the review of the event/activity*]* Are the event/activity objectives understood and accepted by all leaders involved in the event/activity?
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| **finance and budgets** | * Is there an income/expenditure budget including ‘cash flow’?

[*Note: the budget must be reviewed on a regular basis*]* Does the budget include the obligatory contingency?

[*Usually 10% at the start of planning – this can be reduced after high fixed cost items have been paid but must remain at a high enough level*]* What is the cash-flow profile? Will any up-front ‘pump-priming’ be required prior to deposits being received from participants?

[*Note: If ‘pump-priming’ is required, how will this be raised?*]* Who will the person responsible for budget control liaise with and how often will this liaison take place? Has the Event Treasurer been approved by the CEC and been given a copy of the County event finance guidelines?

[*eg: County Treasurer; CMT line manager; etc*]* Is the policy for any surplus, or deficit, from the event/activity understood by all involved?

[*Note: refer to ‘Leader funding on county events’*]* Is the policy for financial support for leaders understood by all leaders?

[*Note: refer to ‘Leader funding on county events’*]* What is the process for checking external contracts?

[*Note: who will check; who will sign; up to what point/time are commitments reversible?*]* Up to what point (date) could the activity be cancelled with minimum expenditure being incurred?
* How will everyone/everything involved be appropriately covered by insurance?

[*Note: consider* including *cancellation; mountain rescue; or other special insurance policies where appropriate*]* Do the insurance policies have sufficiently high limits? (nb: insurance cover should be in place **before** significant financial commitments are made

[*eg: Unity Insurance’s travel policy has a per person and per activity limit*]* Are there any VAT or other external financial implications for the activity?

[*Note:* *discuss with County Treasurer, as appropriate*] |
| **finance and budgets*****cont*** | * How will moneys (receipts; expenditure; bank account) be managed?

[*Note:* *discuss with County Treasurer*]* How will foreign currency be managed if the activity is abroad?
* If there is to be a special bank account, who will be signatories?

[*Note: minimum requirement is two signatories from three or more – one of these must be the County Treasurer*]* Are credit cards required for the event/activity?

[*Note:* *discuss with County Treasurer*]* Does the budget include an allowance for carbon offsetting in line with County policy?
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| **reviews and report back** | * Are interim and post event/activity review stages in place?
* Is there a mechanism in place to collect review comments from all participants?
* Does the post event/activity review include plans to measure the event/activity against the original objectives?
* Are plans in place to publish a report and submit accounts to CMT/CEC?

[*Note: accounts must be finalised by the end of the financial year (end of March) following the event/activity*]* What plans are in place to make sure that any learning from the event/activity can be shared with similar future event/activities?
* Are there plans to provide an open/public Report Back (mainly delivered by young people)?
* Is there a support process in place to help participants deliver report backs to their local Scouting?
* Have any incidents, injuries, or accidents that required **external** support (eg: medical help; emergency services; etc) been reported by the event/activity leader to HQ/Unity using the appropriate *Incident Report Form* at the earliest suitable opportunity?
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