# 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.***

|  |  |
| --- | --- |
| **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? |
| 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.** | |

|  |  |
| --- | --- |
| 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 |
| **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 |

|  |  |
| --- | --- |
| **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? |

|  |  |
| --- | --- |
| **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*] |

|  |  |
| --- | --- |
| **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? |

|  |  |
| --- | --- |
| **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? |

|  |  |
| --- | --- |
| **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? |

|  |  |
| --- | --- |
| **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? |

|  |  |
| --- | --- |
| **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? |

|  |  |
| --- | --- |
| **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? |

June 2020