

# Council and District



# Plan Book



BOY SCOUTS OF AMERICA®

# Council and District PLAN BOOK



BOY SCOUTS OF AMERICA®

# PLANNING

Good planning is as indispensable to Scouting as it is to any business or other important undertaking.

The process of planning is in itself educational. It helps participants see the whole picture and their place in it. It builds unity and common purpose and generates the spirit and enthusiasm that are important ingredients of progress.

Charts alone do not speak to the human equation. Personnel at all levels need to be involved and committed to all phases of planning, setting objectives, and attaining objectives.

The needs of today and the needs of youth are great. Your plans should match these needs. Set high but realistic objectives, and your satisfaction in their achievement will be proportionately great.

Units are where it all happens. Units are why all councils and all districts exist.

The Centennial Quality District Award and Centennial Quality Council Award of the Boy Scouts of America measure the support the organization provides to units.

The “Four Function” concept plan endorsed by the National Executive Board for districts and councils is:

1. Membership/Relationships
2. Finance
3. Program
4. Unit Service

The responsibilities listed under each function are to be carried out by the district or council in support of packs, troops, teams, and crews. Each responsibility is noted as primary or support responsibility. It is important for the officers of the district or council to make certain that these functions and responsibilities are assigned and carried out in support of units.

This plan is flexible; it's simple, and all council leadership structures can implement it.

## THE FOLLOWING FUNCTIONS ARE TO BE CARRIED OUT IN SUPPORT OF UNITS

### MEMBERSHIP/RELATIONSHIPS FUNCTION

	District	Council
Boy-fact survey	*	S
Chartered organizations survey	*	S
Cultivation of potential chartered organizations	*	*
New-unit campaign	*/S	*/S
New-unit organization	*	S
Unit reorganization	*	S
Relationships Conference	S	*
Roundup and School Night	*/S	*/S
Open house (Venturing)	*	S
Career interest survey (Venturing)	S	*
Webelos-to-Scout plan	*	S
Scouts with special needs	*	S

### FINANCE FUNCTION

	District	Council
Financial planning	S	*
Governance, audits	O	*
Accounting	S	*
Funding		
Operating		
Friends of Scouting	S	*
Project sales	S	*
Product sales	S	*
United Way	S	*
Grants	S	*
Major gifts	S	*
Capital		
Readiness	O	*
Campaigns	S	*
Major gifts	S	*
Endowment		
Planned giving	S	*
Major gifts	S	*
Investment management	O	*
Tax, trust, and legal support	O	*
Unit money-earning permit applications	S	*

### PROGRAM FUNCTION— TRAINING

	District	Council
Adult Fast Start, basic, supplemental and advanced unit leaders' training	*	*
Wood Badge	S	*
Records and reports	S	*
District volunteers	S	*
Council volunteers	O	*
Youth training	S	*
Training awards	S	*

### PROGRAM FUNCTION— CAMPING AND OUTDOOR

	District	Council
Summer camp promotion	*	S
Local high-adventure base promotion	*	*
National-high adventure bases	*	S
Cub Scout camping (day and resident)	*	S
Family camping promotion	*	S
10 days and nights of camping	*	S
Order of the Arrow	S	*
Camperships	*	*

Camp program enrichment	O	*
National Camping Award	*	S
Camp maintenance and inspection	O	*
Camp standards and policy (tour permit)	O	*

### PROGRAM FUNCTION—

#### ACTIVITIES AND CIVIC SERVICE

	District	Council
Plan and promote district activities	*	S
Plan and promote council activities	S	*
Camporees	*	S
District installation and recognition program	*	S
Community service projects	*	*

### PROGRAM FUNCTION—

#### ADVANCEMENT AND RECOGNITION

	District	Council
Train boards of review	*	*
Standards of advancement and courts of honor	O	S
Recruit and train merit badge counselors	*	S
Pack/troop/team/crew advancement programs	S	S
Lifesaving and meritorious awards	S	*
Merit badge counselors directory	*	*
District and council awards	*	*
Religious emblems	*	*

### UNIT SERVICE FUNCTION—

#### COMMISSIONER SERVICE

	District	Council
Annual commissioner service plan	*	*
Unit service	*	S
Unit charter renewal	*	S
Quality Unit program	*	S
Leader counseling	*	S
Unit committee guidance	*	S
Boys' Life promotion	*	S
Unit budget plan	*	S
Commissioner staff recruitment and training	*	S
Unit program planning	*	S
Guidance in unit leader selection	*	S
Train unit committees and chartered organization representatives	*	S
Roundtables	*	S
Annual commissioner conference	S	*

### Code for Functions Listed Above as It Relates to Support to Units by District and Council

\* —Primary Responsibility  
S—Support Responsibility  
O—Not Responsible

# THE PARTS OF THE ANNUAL PLAN

A good plan has the power to attract volunteers, to unite and challenge the district or council, and to produce the highest result in achievement and satisfaction.

The first responsibility of any council or district officer or chair of a committee is to ensure the development of a practical plan for the year's operation.

The annual plan follows the trail blazed by the council's strategic plan, accepting its established goals and the challenge for the coming year's achievement and building a practical program that will ensure their attainment.

## The Four Parts of a Good Plan

Any good plan must answer four questions:

1. Where do we want to go from here?
2. What things will we do to get there?
3. When will these things occur?
4. What will each person do each month?

The answers to these questions constitute the four parts of a complete plan:

1. Objectives
2. Program
3. Calendar
4. Work Schedule

## Objectives

Objectives should:

1. Be challenging.
2. Be stated numerically wherever possible.
3. Show each district's share of the total council's goal.

Only worthwhile undertakings have the power to attract and hold able men and women and inspire their best effort. In any enterprise, conservative goals lead only to mediocre results and deny the satisfaction and pride in Scouters that the greater challenge might have afforded. "Make no little plans..." is basic wisdom for council and district leadership.

Objectives—whether in unit service, membership, program, or finance—should show numerical goals for each district, so many new units, so many troops in long-term camping, so many unit leaders to have basic training. It is wise to go a step farther and establish quarterly and monthly goals that lead to the year-end objective and that take into account periods of the year that are likely to be most productive.

## Program

This is a written listing of all the things that will be done—specific projects that should result in reaching the objectives. A written program of this sort should be prepared for each committee and should show both what things are to be done on a council basis and what will be done in each district. District and council activities should supplement and not replace unit programming.

## Calendar

The next step is to fit the program items into the year's calendar, giving each a date, a deadline, or a period of duration. This gives the program a track to run on and a timetable. It helps to avoid conflicts and to balance and level out the work, as well as to anticipate and plan ahead.

## Work Schedule

This involves breaking each program item or activity into the steps by which it is produced. These steps are given deadline dates and assigned as specific tasks for individual accomplishments each quarter. Thus, at each meeting of a committee, each member takes one or two specific tasks, which are to be accomplished before the next meeting.

## Selecting District People

*Selecting District People* is a guide for professionals and district leaders aimed at recruiting district volunteers and strengthening district operation.

# STEPS IN MAKING THE ANNUAL PLAN

## Gearing Into the Council Strategic Plan

Using the council's current strategic plan, the first step is the annual review and updating of the strategic plan. By this review, and the resulting action of the executive board to approve current objectives that are attainable and challenging, the parts of the strategic plan affecting the annual plan being prepared can become the groundwork for subsequent steps in making the annual plan.

The process of building the annual plan should begin well in advance of the quarter in which the plan will take effect. Starting early allows the logical steps to be taken in order, makes it possible to involve many people in unhurried deliberation, and permits basing the annual budget on the resulting plan.

Steps in building an annual plan vary somewhat with different councils. Flexibility is fine as long as the basic principles are thoroughly respected:

1. The planning process is begun early.
2. All key leaders are involved.
3. The council makes one united plan—"all for one and one for all"—in which each district has its share.
4. The plan is complete in all its parts: objectives, program, calendar, work schedule.

In general, the steps in building an annual plan are as follows.

## Staff Planning Conference

The professional staff develops a proposed plan. This is called a "pencil draft" to emphasize the fact that while the staff suggests, the volunteers make the final decision. This planning should be based on a thorough knowledge of unit needs, district needs, and the desires of volunteer groups. Having the pencil draft prepared in advance conserves the time of many volunteers and provides them with a good starting point.

## District Officers' Conferences

A series of informal conferences follows the staff planning conference. The meeting of district officers, or the district executive committee, is to review the pencil draft and make any changes that seem desirable. The important thing is that this process gives each of these key leaders an opportunity to share in the thinking and to be prepared for the council planning conference that is to follow.

## Council Planning Conference

This meeting, involving the key leaders of the council and its districts, is best held on an afternoon and an evening. The first part is devoted to group meetings that consider the plan for each operating committee. When this has been completed, the groups join to hear the presentation of each committee's plans. The plan refined in this meeting goes to the council executive board for its adoption.

## The Districts Detail and Define Their Share

At the next regular meeting of the districts, the council's plan and the districts' shares in it are reviewed. Each committee details and defines its program and calendar.

The council program is broad and general, as it affects the program of the various functions. It may include a "camporee in every district," but it does not specify either the date or the place. The council has established new-unit objectives, but it does not specify where or when these are to be organized. Thus, there remains to each district and each committee a considerable task of putting in the specifics and details.

## Unit Planning Conference

After the commissioner staff reviews the plan and its part in it, the council prepares an annual program planning kit for each unit. The kits are distributed as part of a councilwide program kickoff or at a unit planning conference in each district.

## The Role

## District Unit Objectives

## Objectives for This Year

Follow and “track” the Steps of New-Unit Organization using current literature.

---

---

---

---

---

---



---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---



---

---



## Council Unit Objectives

	Objectives for This Year			
	Cub Scout Packs	Boy Scout Troops	Varsity Scout Teams	Venturer Crews
Objectives last year				
Total at beginning of year				
New units to be organized				
Previously dropped units to be reorganized				
Maximum units that may drop				
Total units at end of year				
Units with two-deep leadership				

## District Total Available Youth

	Last Year's Total			This Year's Objective		
	TAY* (Dec. 31)	Total Membership	% TAY	TAY* (Dec. 31)	Total Membership	% TAY
Tiger Cubs (first-grade boys)						
Cub Scouts (second- and third-grade boys)						
Webelos Scouts (fourth- and fifth-grade boys)						
Boy Scouts (sixth–eighth-grade boys) —include Varsity Scouts**						
Venturers (ninth–11th-grade youth)***						
Total youth***						

\* TAY—Total available youth—includes all boys first grade through eighth grade and young men and women ninth through 11th grades.

\*\* Include Varsity Scouts in Boy Scout membership.

\*\*\* Venturing population and total youth population includes young men and women grades nine through 11.

## Other Important Membership/Relationships Tasks

- Review membership against objectives on a regular basis.
- Update the chartered organization survey.
- Recruit and train enough personnel to carry out the various membership/relationships functions.
- Conduct boy-fact surveys and career interest surveys.
- Conduct a chartered organization survey.
- Develop a detailed calendar for the organization of new units, using the 12-step plan, Impact Plan luncheon, and the together plan for unit organization.
- Visit and train the head of each chartered organization to review and strengthen our Scouting relationship.
- Plan and conduct fall roundup, School Night, and Venturing open houses.
- Conduct a relationships conference on a council or district level at least once a year.
- Cultivate potential organizations for new units.
- Develop councilwide relationships with religious, educational, civic, and community organizations.
- Conduct campaign to reorganize units that dropped during the past year.
- Train chartered organization representatives. (Use *Training the Chartered Organization Representative*.)
- Promote the use of materials for Scouts with special needs.

## Set Dates in Calendar for Membership/Relationships Tasks and Meetings

Jan.	Feb.	March	April	May	June
July	Aug.	Sept.	Oct.	Nov.	Dec.



# FINANCE FUNCTION

## The Role

The functions of finance are twofold: first, to **secure adequate financial support** to deliver a quality and effective Scouting program in the local communities served; and second, to **control and account for income and expenditures**. The success of the local council in securing its financial health includes evaluating local needs and opportunities, strategizing to help ensure success, enlisting the appropriate human capital, adhering to and executing the plan, and recognizing donors with timely and ongoing communication. Crucial to the entire process is the **development and maintenance of effective relationships with all funding sources—individuals and organizational**.

A major component of the donor relationship is **trustworthy fiscal stewardship**. Gifts to Scouting must be accounted for properly, used as directed, and managed with the integrity of the Scouting program. Stakeholders for our fiscal stewardship include our donors, chartered organizations, communities, families, and the youths we serve.

**Objectives for the Year.** Each year the local council and their districts need to build the council budget for the year. Each district and council committee should participate in the budget-building process with goals developed to reflect income and expenses relative to program delivery, membership service, activities, outdoor programs, Friends of Scouting, product sales, project sales, foundations, special events, endowment/investment income, United Way income, capital needs, endowment growth, special projects, and other income. Set your calendar to reflect income and expense checkpoints that provide the opportunity to correct the financial health of the council.

## Objectives for This Year

	DISTRICT		COUNCIL	
	Last Year's Total	This Year's Objectives	Last Year's Total	This Year's Objectives
United Way income				
Friends of Scouting				
Endowment/investment income				
Special events				
Product sales				
Project sales				
Foundations				
Special fundraising activities				
Other income				
Total operating income				
Percent increase over last year				
Income for capital needs				
Additions to endowment fund				

## Carry Out the Following Tasks

- Organize a finance committee to reach the objectives.
- Conduct a Friends of Scouting campaign.
- Carry out a full range of endowment development activities.
- Determine the type of special fundraising activities and carry out programs.
- Implement the Scouting Heritage Society and James E. West Fellowship Award.
- Develop, list, and research foundations for appropriate support.
- Seek government and other special funding for serving low-income youth.
- Inform units on responsibility and policies, and approve the proposed unit money-earning permit application.
- Maintain a program of information and cultivation of financial supporters and the public.
- Coordinate ticket sales for the Scouting show.
- Develop and implement a budget building process.
- Implement an audit committee.

## Set Dates in Calendar for Finance Tasks and Meetings

Jan.	Feb.	March	April	May	June
July	Aug.	Sept.	Oct.	Nov.	Dec.

## PROGRAM FUNCTION—TRAINING

### The Role

The function of training is to plan, prepare, promote, and present a complete program of training to meet the needs revealed by accurate and up-to-date training records. (These records begin with a unit inventory of training.)

### Objectives for This Year

	DISTRICT				COUNCIL			
	Last Year's Total		This Year's Objectives		Last Year's Total		This Year's Objectives	
	No.	%	No.	%	No.	%	No.	%
<b>Units With</b>								
• Top leader trained	_____	_____	_____	_____	_____	_____	_____	_____
Cub Scout packs	_____	_____	_____	_____	_____	_____	_____	_____
Boy Scout troops	_____	_____	_____	_____	_____	_____	_____	_____
Varsity Scout teams	_____	_____	_____	_____	_____	_____	_____	_____
Venturer crews	_____	_____	_____	_____	_____	_____	_____	_____
Total units	_____	_____	_____	_____	_____	_____	_____	_____
• Direct contact leaders trained	_____	_____	_____	_____	_____	_____	_____	_____
Webelos den leaders	_____	_____	_____	_____	_____	_____	_____	_____
Den leaders	_____	_____	_____	_____	_____	_____	_____	_____
Tiger Cub den leaders	_____	_____	_____	_____	_____	_____	_____	_____
• Youth leaders trained	_____	_____	_____	_____	_____	_____	_____	_____
Venturing elected officers' seminar	_____	_____	_____	_____	_____	_____	_____	_____
Den chiefs trained	_____	_____	_____	_____	_____	_____	_____	_____

### Training Tasks to Be Carried Out in Support of Units

- Prepare a target list of untrained leaders.
- Recruit and train enough trainers to provide training for each new unit as soon as it is organized.
- Provide training for new leaders of existing units as soon as possible after they are recruited.
- Conduct a Cub Scout leaders' pow wow and/or University of Scouting.
- Make troop/team leader training available on a district or council basis.
- Conduct a den chief training conference.
- Promote the elected officers' seminar in each crew and ship.
- Promote the use of Philmont Training Center opportunities as often as possible.
- Provide training for district and council volunteers.
- Prepare a schedule of adult orientation, basic, supplemental, and advanced unit leader training.
- Provide Wood Badge training.
- Administer training awards.
- Prepare and keep training records and reports.
- Conduct a "Trainer Development Conference" annually.
- Train chartered organization representatives.
- Train heads of chartered organizations.

### Set Dates in Calendar for Training Tasks and Meetings

Jan.	Feb.	March	April	May	June
July	Aug.	Sept.	Oct.	Nov.	Dec.

## PROGRAM FUNCTION—CAMPING AND OUTDOOR

### The Role

The function of outdoor program/camping/high adventure: To plan and promote a year-round program of outdoor activities for Cub Scouts, Boy Scouts, Varsity Scouts, and Venturers; and to provide adequate facilities and leadership in keeping with national standards.

### Objectives for This Year

	DISTRICT				COUNCIL			
	Last Year's Total		This Year's Objectives		Last Year's Total		This Year's Objectives	
	No.	%	No.	%	No.	%	No.	%
Troops/teams long-term camp (minimum: six days and nights)	_____	_____	_____	_____	_____	_____	_____	_____
Crews in superactivity	_____	_____	_____	_____	_____	_____	_____	_____
Packs in day camp	_____	_____	_____	_____	_____	_____	_____	_____
Packs (Webelos Scouts and Cub Scouts) in resident camp	_____	_____	_____	_____	_____	_____	_____	_____
Total units in outdoor program or superactivity	_____	_____	_____	_____	_____	_____	_____	_____

\* Percentage based on June 30 membership

### Outdoor Program Tasks in Support of Units

- Participate in summer camp and high-adventure base promotions.
- Promote and plan Cub Scout day camp.
- Through personal contact, help each troop/team develop plans for its year-round outdoor program.
- Encourage Boy Scout troops/Varsity Scout teams in high-adventure opportunities.
- Provide special help to crews on high-adventure activities.
- Organize council contingents to national high-adventure bases.
- Promote monthly campouts.
- Ensure camp policies and standards are followed.
- Plan and promote conservation projects and environmental programs.
- Develop campmaster corps.
- Have a maintenance plan and OSHA responsibilities.
- Promote the Order of the Arrow.
- Support camperships.
- Maintain health and safety standards (training courses and inspections).
- Develop optimum use of camp property.
- Encourage packs in sports program.
- Promote packs (Webelos Scouts and Cub Scouts) in resident camp.
- Promote packs (Webelos Scouts and Cub Scouts) in family camp.

### Set Dates in Calendar for Outdoor Program Tasks and Meetings

Jan.	Feb.	March	April	May	June
July	Aug.	Sept.	Oct.	Nov.	Dec.

## PROGRAM FUNCTION—ACTIVITIES AND CIVIC SERVICE

### The Role

The function of activities and civic service is to plan activities and civic service projects that supplement the unit program.

### Objectives for This Year

	DISTRICT				COUNCIL			
	Last Year's Total		This Year's Objectives		Last Year's Total		This Year's Objectives	
	No.	%	No.	%	No.	%	No.	%
Units participating in display events (council/district shows)	_____	_____	_____	_____	_____	_____	_____	_____
Troops/teams participating in skill events (camporee, klondike derby, etc.)	_____	_____	_____	_____	_____	_____	_____	_____
Units participating in Scouting Anniversary Week activities	_____	_____	_____	_____	_____	_____	_____	_____
Units participating in civic service projects (Good Turn)	_____	_____	_____	_____	_____	_____	_____	_____
Packs qualifying for National Summertime Pack Award	_____	_____	_____	_____	_____	_____	_____	_____

### Activities and Civic Service Tasks in Support of Units

- Plan a council or district show for units.
- Plan and conduct a camporee or other Scout troop skill event.
- Promote Scouting Anniversary Week activities.
- Promote activities and civic service opportunities.
- Conduct a conservation project.
- Conduct a council and district installation and recognition programs.
- **Be the conscience of the district and council for practical citizenship training projects.**

### Set Dates in Calendar for Activities and Civic Service Tasks and Meetings

Jan.	Feb.	March	April	May	June
July	Aug.	Sept.	Oct.	Nov.	Dec.

## PROGRAM FUNCTION—ADVANCEMENT AND RECOGNITION

### The Role

The function of advancement and recognition is to maintain and promote an advancement program in all units in the council so that Cub Scouts, Boy Scouts, Varsity Scouts, and Venturers will have the maximum opportunity to advance and be recognized publicly for their achievements.

### Objectives for This Year

	DISTRICT				COUNCIL			
	Last Year's Total		This Year's Objectives		Last Year's Total		This Year's Objectives	
	No.	%	No.	%	No.	%	No.	%
Cub Scout advancement in rank	_____	_____	_____	_____	_____	_____	_____	_____
Boy Scout ranks earned (Tenderfoot through Eagle)	_____	_____	_____	_____	_____	_____	_____	_____
Venturing awards earned	_____	_____	_____	_____	_____	_____	_____	_____

### Advancement and Recognition Tasks to Support Units

- Give immediate help by visiting and assisting each unit where the record shows lack of advancement.
- Maintain an adequate corps of merit badge counselors, and encourage each troop committee to do the same.
- With the cooperation of the commissioners, help each unit with its advancement plan:
  - Packs—parent instruction and recognition ceremonies
  - Troops/teams—monthly boards of review and quarterly courts of honor
  - Teams—quarterly boards of review
  - Crews—youth involved with Venturing awards
- Instruct personnel in conducting progress reviews.
- Assist troop/team/crew committees in conducting Eagle Scout ceremonies.
- Recruit and train merit badge counselors.
- Prepare a merit badge counselor directory.
- Maintain standards of advancement and courts of honor.
- Review lifesaving and/or meritorious awards.
- Review district and council awards and recognitions.
- Maintain advancement records and reports.
- Promote the religious emblems of all faith communities.

### Set Dates in Calendar for Advancement and Recognition Tasks and Meetings

Jan.	Feb.	March	April	May	June
July	Aug.	Sept.	Oct.	Nov.	Dec.

## UNIT SERVICE FUNCTION—COMMISSIONER STAFF

### The Role

The function of the commissioner staff is to help all units succeed; to know the leadership, the plans, and the problems of each unit; to cooperate with the committees of the district in promoting all phases of the Scouting program; to plan, promote, and conduct roundtables; to be responsible for the on-time rechartering of existing units; and to help units qualify as Centennial Quality Units.

### Objectives for This Year

	DISTRICT			COUNCIL		
	Last Year's Total	Current Need	This Year's Objectives	Last Year's Total	Current Need	This Year's Objectives
Units reregistering on time	_____	_____	_____	_____	_____	_____
Recruit unit commissioners (one for each three units)	_____	_____	_____	_____	_____	_____
Recruit assistant district commissioners (one for each five unit commissioner positions)	_____	_____	_____	_____	_____	_____
Commissioners with basic training	_____	_____	_____	_____	_____	_____
Total Centennial Quality Units	_____	_____	_____	_____	_____	_____
Percentage of Centennial Quality Units	_____	_____	_____	_____	_____	_____

### Unit Service Tasks to Be Carried Out in Support of Units

- Assure regular, helpful service to every unit, providing special assistance to new units.
- Give prompt help with any problems that threaten the life of a unit.
- Carry out all parts of the Annual Commissioner Service Plan.
- Help units with recruiting plans, including fall roundup and Venturing open house.
- Conduct monthly program-oriented roundtables.
- Conduct a membership inventory and uniform inspection, charter review, and assist in the successful on-time rechartering of all units.
- Help units to make full use of *Boys' Life*, *Scouting*, *Cub Scout Program Helps*, and *Troop Program Features*.
- Conduct and promote an annual commissioner conference for all commissioners.
- Help units with their annual program planning conference and monthly program planning and leader training.
- Give guidance to unit committees in unit leader selection.
- Help units in the development of an annual (12-month) budget plan.
- Help reorganize units.

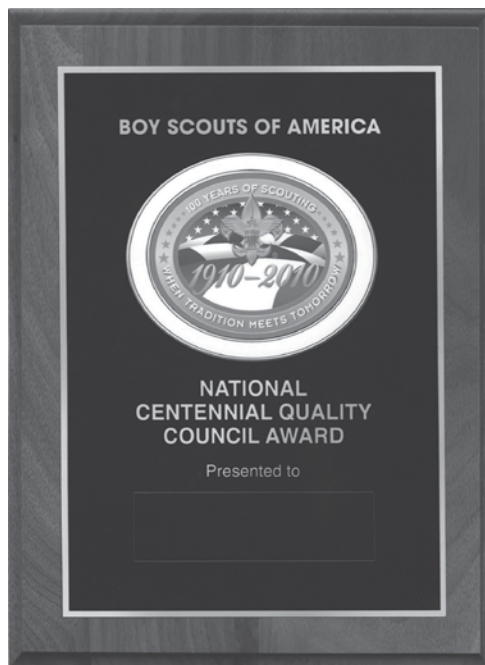
### Set Dates in Calendar for Commissioner Staff

Jan.	Feb.	March	April	May	June
July	Aug.	Sept.	Oct.	Nov.	Dec.

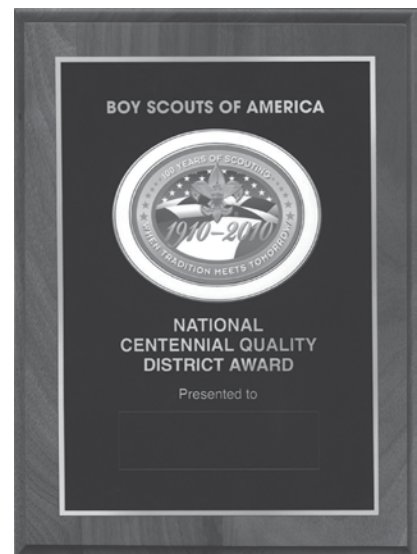
# CENTENNIAL QUALITY PROGRAM RECOGNITIONS FOR COUNCILS, DISTRICTS, AND UNITS



**Centennial Quality  
Unit Streamer**



**Centennial Quality  
Council Plaque**



**Centennial Quality  
District Plaque**



**Centennial Quality  
Unit Plaque**



**Centennial Quality  
District Emblem**



**Centennial Quality  
Unit Emblem**



**Centennial  
Quality Unit Pin**



**Centennial Quality  
District Pin**



**Centennial Quality  
Council Pin**









**BOY SCOUTS OF AMERICA**  
1325 West Walnut Hill Lane  
P.O. Box 152079  
Irving, Texas 75015-2079  
<http://www.scouting.org>

513-002  
2009 Printing