Engaging the Council Office for Council and Area Events

Prevailing Principles:

1. Council Events are Council Key 3 Events (CC, CYC & CED)
2. Area Events are Area Key 3 Events (AC, AYC & ASM)
3. All Events (excluding Groups) have an impact on Council for financial reporting and audit purposes as per Scouts Canada's Bylaw, Policies and Procedures.

Steps to a Successful Event:

Without question our members have the attitude, skills and knowledge to run successful events for our young members. The following information is not intended to tell any one individual or any committee on what program activities to do, where to hold an event, or what to charge. Its purpose is to clearly outline that with any "event" there is a hierarchy of responsibility and accountability that must be followed as a result of the Organization's requirements, as well as office processes that have evolved to administratively support these events at an Area and Council level.

The following list of steps is outlined in this document:

Step 1 - Decide on an Event

Part of the general discussions on whether or not an event is going to take place occurs among the group of people who have a stake in that event, in conjunction with a final decision by the Key 3 if it is to move forward. If the event is typically "***theme-based***", this would be a good time to entertain suggestions, or alternatively, defer to the Event Organizers ***(See Step 7)***.

Step 2 – Select a Date & Location (tentative)

Part of the general discussion is the tentative selection of date and location for the Event.

Date – It is critical that the event date is set well in advance of the event itself. This will permit ample time to prepare, promote and perform the tasks that make an event successful.

Location – The location of an event is often determined by:

a) **the date** *(accessibility due to potential weather conditions),*
b) **theme**, if selected *(facility best suited to maximize the theme selected)*
c) **age appropriate** *(facility able to accommodate the needs of the participants),*
d) **anticipated numbers** *(capacity & and consideration to other events that may draw people away)*
e) **a desire to use new locations** *(fairness to other facilities),*
f) **facility availability*** *(confirmation that it is available for the desired date)*
g) **facility cost** *(impact on event fees),*
h) other factors...

**** The facility vetting task ((f) above) may be predetermined by the Key 3 or left to the Organizing Committee. However, if left to the Committee, see step 7.***

Step 3 – Select an Event Chair

Council Key 3 to jointly appoint an Event Chair to facilitate the event. The Event Chair is accountable to the Key 3; however, oversight responsibilities may be delegated through a Scouter (e.g. Deputy Commissioner) as support to the Event Chair.

Step 4 – Develop the Event Team

The Event Chair is responsible for establishing a team by firstly developing a draft list of team members that the Chair would like to approach based on event requirements (i.e. security, program, sites & services, Offers of Service, etc.). This list is presented to the Key 3 for approval and further recommendation, if necessary. The Event Chair recruits committee members for each portfolio based on the approved list. If a member declines, a new name will need to be submitted. If a member accepts based on a portfolio change from the original proposal, the Event Chair will need to get confirmation from the Key 3 that the change is acceptable.

Step 5 – Event Chair to Review Related Council Office Processes

Enter discussions with the Council Office (typically the Operations Manager) to go over processes that relate to the scope of the event. Discussions to include items outlined under Step 6 – topic 4 below, as well as:

a) Clarify event committee liaison with Council office liaison (Staff Support – registration vs. finance)

b) Event registration management (overview of how registrations will be handled)

c) Financial & registration reporting from Council office to the Event Committee

Step 6 – Hold the Introductory Planning Meeting

In the first meeting, the Event Chair would discuss the following key topics:

1) Introduce Committee (Team) members and their assigned portfolios
2) Communicate the event theme (if decided during Step 1). If not, open discussion with the Committee to develop two or three possibilities for presentation to Key 3 for approval.
3) Communicate the event date and location (if decided during Step 2). If not, open discussion with the Committee to develop at least two options for presentation to the Key 3 for approval.
4) Discuss processes that the Committee members will need to be aware of:
    a. Event Budget & Approval Process
    b. Event Registration Process (Revenue In)
    c. Paying the Bills (Expenses Out)
    d. Advance Funding Process
    e. Marketing and promotional support from the Council office (i.e. website, e-mail blasts, e-newsletters)
    f. Donations Process (if applicable)
5) General Event Discussions (Brainstorming Session)
6) Establish schedule for future meetings

Step 7 – Confirm Event's Main Logistics – Theme, Date and Location

If theme, date and location have been confirmed by Key 3 prior to Step 6, proceed to Step 8.

Otherwise, if the facility has not been vetted, before approaching the Key 3 with options, confirm availability for the preferred dates. If the facility is not available during the preferred dates, find out which dates are available and tentatively book it through the proper channels.

Present findings to the Key 3 to get final approval for theme, date and location. Once a decision has been made and booking confirmed, any contracts resulting therefrom must be signed off by the Council office as per Scouts Canada policy and Council process.

Step 8 – Develop the Program & Build the Budget

These two items "develop the program" and "build the budget" will happen in conjunction with each other. As program elements are introduced, ensure that all associated costs as a result of program activities are reflected in the budget.

Use the "**Event Budget"** template provided to you by the Council Office *(also on the website under "Administration, category "Finance")* as your source tool in developing the budget. Follow the instructions contained within the Excel file. This file is good for almost any event from Group to Council.

Step 9 – Present Draft Budget to Key 3 for Approval

Submitting the budget to the Key 3 requires that the file be e-mailed (preferably) and sent to the Key 3; or a print-out of both the "Proposed Budget" tab and the "Budget Detail" tab to be provided to the Key 3.
If approved, a member of the Key 3 will print the "Approved Budget", sign and date it, then forward to the Council Office Accountant who will assign appropriate account codes for Revenue and Expenses, who in turn will provide to the Event Chair along with other relevant finance files and processes. **Proceed to Step 10.**

If not approved, feedback is provided from the Key 3 to the Event Chair with recommended changes. Discussions occur to negotiate identified changes. A new draft budget is prepared and resubmitted to the Key 3 for approval as outlined above.

An event budget should have final approval 4 to 6 months prior to the event. Larger events may require more time.

Step 10 – Prepare the Event Registration Form (using the Council Template)

This generic form was created to standardize the registration process for any event (Council or Area) to permit the Council office to better facilitate and track all ongoing event registrations. "**Organizers**" of the event will be required to populate portions of the form with relevant details about their event. This form is only designed to capture the base information about the "**Registrant**" Group and/or Section along with a summarized event fee.

Depending on the scope and variability of the event, the Event Registration Form does not necessarily lend itself to capturing extra items like memorabilia/sales ordering data (t-shirts, ball-caps, etc.), or dietary requirements if a meal plan is being catered by the event itself. If not, the collection of this information must be captured by the Organizers on a separate form. ***(See 11 f)***

Step 11 – Prepare the Event Information Package

Let your creativity soar! Everything that your committee needs to communicate to the membership will be contained in your "**Event Information Package**". This may include:

a) An Event Flyer (1-page advertisement), Crest or Logo
b) About the Event...
c) "Event Attendance List" form with reminder that all attendees must be "Active" in Myscouts.
d) Directions to Camp
e) Packing Instructions (What to bring – what NOT to bring).
f) Other information to collect not captured on the Event Registration Form. **<u>Organizers may need to develop a form for gathering information on</u>:**

1. **Memorabilia** – if an event is offering memorabilia, there are three options for presenting this to your Registrants:
    a. **Option A –** All Registrants will receive the same memorabilia included in the event fee, but there are no size requirements (e.g. crests, pins). <u>THEREFORE NO ADDITIONAL FORM REQUIRED</u>.
    b. **Option B** – Every Registrant will receive the same memorabilia which is included in the event fee, but there is a requirement to collect data on size, colour, quantity, etc. This form would be submitted along with the Event Registration Form.
    c. **Option C** – Variable choices of memorabilia. Due to unknown ordering choices of the Registrants, the order form will need to include costing and total charge of the order. This form would be submitted along with the Event Registration Form **and additional payment**.
2. **Catering** – if an event is being held at a location that offers catering services, the organizers will need to comply with the facilities requirements to collect certain data. It may be necessary to develop a form for the registrants (Group/Section) to express any dietary restrictions. Consult the facility on the best way to capture this data. This form would be submitted along with the Event Registration Form.
3. **Program Selection Options** – depending on the size and scale of the event, and/or the limitations of the facility, it may be necessary to request from the registrants their choice of program options. If so, the committee would develop a form to capture the data which would be submitted along with the Event Registration Form.

The above items (excluding 1 a.), can be included on a singular form that is created by the organizing committee and would be part of your Event Information Package. There is a space on the "Event Registration Form" to add a reminder to complete this additional form and include it with their submission of the Event Registration Form and overall payment for the event.

g) And finally, the "***Event Registration Form***" as prepared in **Step 10**

Step 12 – Promote Your Event!

Now's the time to start spreading the word, and the Council Office can help!

Contact your Council office liaison and provide them with your "***Event Information Package***". We will post the event on the website calendar and homepage. Other options may be available such as:

a) Other web pages
b) Council e-newsletters
c) E-mail Blasts

Step 13 – Work the Logistics – Registrations Collected and Data Shared

When received by the Council office, event revenues will be deposited into the account identified and Event Registration paperwork will be filed for Committee reference. A schedule will be set up for the staff liaison to periodically "scan e-mail" to the Event Contact all the registration information collected on the following basis:

a. once every two weeks (up to two months before the event),
b. once per week (inside two months of the event),
c. as necessary due to changes (immediately prior to the event)

This information will include:

a. All new Event Registration Forms
b. Any other form as created by the Organizing Committee

Confirm your Attendees – Myscouts provides the ability for event organizers to confirm the registration status of all attendees. To that end, Council has provided an "***Event Attendance List***" form will need to be sent out to the Group/Section to confirm the names of the attendees. You can choose one of two methods for getting this information back: 1) include it in your Event Information Package and request that it be sent in with the Event Registration Form; or 2) hold off and send it by e-mail specifically to the Group once they confirm attendance with the "Event Registration Form". The second method allows you to connect directly with the Group/Section and allows them additional time to confirm actual attendees (excluding those who may pull out last minute due to illness or personal/work obligations.)

As Event Chair, continue to have necessary meetings and monitor the progress of your team. If tasks seem to be falling behind, determine the issue and address it accordingly...sooner, rather than leaving it too late to do anything about it. Provide regular updates (monthly) to the Key 3. Keep them informed if there are concerns, as they might be able to assist.

Developing Databases and Summaries - The Organizing Committee is responsible for developing whatever database lists they need to (e.g. List of attending Groups, # of Participants/Volunteers/Parents, special needs, etc.). **The Council office will not be responsible for summarizing registration information received.**

Step 14 – Event Day!

Everything that you and your team have worked towards is coming to fruition.

<u>During the Event:</u>

- If any “incidents” occur, make sure that all proper reporting has been completed and proper authorities informed.

Step 15 – Wrap-up & Final Reporting

The party’s over and there are some final clean-up chores to do.

<u>Within 7 Days After:</u>

- Make sure that all rented or borrowed equipment or gear has been returned ,
- Event Chair to contact all team members to ensure that outstanding expenses and reports are provided to the Chair by the end of the following week, while the information is fresh,
- Event Chair confirms outstanding invoices/bills are paid by Council

<u>Within 30 Days After (or when Financial Report is available due to event timing):</u>

- Event Chair to prepare event report for presentation to Key 3 based on team member reports (or excerpts from their reports).
- Final report to include Financial Statement of Revenue over Expenditures including any possible outstanding claims or collectibles. ***(see “Financial Reporting from Council”)***
- Event Chair should also consider deserving recognition opportunities for committee members

MODIFICATIONS FOR TRAINING EVENTS

Training Courses operate on very similar processes compared to “Program” events. Here are some variations to the steps identified earlier that relate more to training requirements:

Step 1 – Same

Step 2 – Same

Step 3 – Selection of a “Course Leader”, as opposed to an “Event Chair”

Step 4 – Development of a “Course or Training Team”, as opposed to an “Event Team”

Step 5 – Same

Step 6 – Same

Step 7 – Same

Step 8 – Same

Step 9 – Same

Step 10 – Prepare the “Training Application Form” (using the Council Template)

Step 11 – Same, except for item g)

Step 12 – Same

Step 13 – Same, except there would be no need for an “Event Attendees List” as training is individual-based.

Step 14 – Same

Step 15 – Same

About the Training Application Form

As described in Step 11, there may be more information that the Training Team would like to collect, which may require the development of a customized form to be sent in with the Training Application Form. It is important to understand that having a standardized training application form, not only saves the Course Leader or Administrator time, but it also makes it easier for the Council office to manage incoming registrations due to a consistent look, reducing the possibility of mistakes during processing.

Approvals for Training – the form does not include space for Commissioner approval to attend a course, mostly because of space constraints. However there are two issues relating to “approval” of a member to attend a course: 1) if a prerequisite is required to take the course that has not been met; and 2) if the attendee is expecting reimbursement from the respective Group, Area or Council. This is not a Council office responsibility and must be managed by the Course Leader (issue #1) and the Attendee (Issue #2).

Council Processes and Rationale Related to Events

The following is a listing and explanation of various Council processes and underlying rationales related to Events.

1. Accountability to Key 3

As a result of the restructuring under Bylaw 2, the "KEY 3" (Commissioner, Youth Commissioner and Staff Member) have become accountable to the next senior level of the Organization for all activity that takes place under their assigned jurisdiction. To ensure that this accountability is maintained, appropriate checks and balances are required. As this document outlines, events clearly start with a desire expressed by a group of individuals, whether it be at the Council or Area level, but then quickly shifts to the Key 3 to ensure that the right people are positioned to make an event successful.

The task of working directly with the Event Chair can be delegated to another "agent" of the Key 3 (e.g. DCC or DAC) in so far as assisting and liaising with the Event Chair on their behalf, but the agent will still be required to forward matters requiring Key 3 approval.

An event is not simply about program delivery. In virtually every case, there is a fiscal component that requires significant consideration. In other words, committees working on behalf of the Council or Area have an obligation to not only deliver on the expectations of the purpose of the event, but remain good financial stewards of Council or Area assets, through accountability to the Key 3.

2. Budget & Approval

A comprehensive Budget Template is available from Council. ***(See Steps 8 & 9 of the first section of this document)***

3. Financial Set-up with Council

Account Codes – Through the course of a year an Area or Council may hold several events (some at the same time) which in our operation may mean 10 to 20 events happening in all Areas and Councils at any one given time.

Shortly after the budget has been approved ***(See Step 9)*** by the Key 3, it will be forwarded to the Council Bookkeeper, to have account numbers assigned. These account codes will be recycled each year however an event may not get the same account codes every time.

4. Payment Methods of Event Fees

Group Cheques - For all intents and purposes, the accepted method of payment for events is with a Group cheque (especially from Scouts Canada Groups requiring two signatures) which is submitted with the completed Event Registration Form.

Credit, Debit, Cash - Payments by credit card (call-in verification available) or debit/cash (walk-in Ottawa only), will only be permitted for events that are designed to accept individual registrations (e.g. Rover/Training events). Only under exceptional circumstances will a credit card be accepted for a Group payment <u>and only if authorized by the Event Chair</u> or designate (e.g. Event Registrar or Treasurer). The reason is that Council pays services charges on all credit card transactions, so any charges incurred will be passed on to the event.

5. Other Revenue/Funding

Aside from the typical deposit of event registration revenue, there may be other sources of revenue that require proper accounting through different processes.

Event Donations – some events do very well with procuring cash donations to help offset event expenses. The Council has a process that permits donors to receive a charitable tax receipt for their donation. ***(See Charitable Tax Receipt Request Form)***. These donations need to come through the Event Chair or designate, before coming to the Council office for deposit.

Host Funding – By design, some events during the budget process may include financial support from the hosting body to help reduce event fees charged to attendees. In these cases, other funds controlled by the hosting body are credited to the event account. Although approved in the budget, the Key 3 must explicitly stipulate in writing which account will be used. If funds are being withdrawn from any "investment" portfolio the "***Restricted Funds (Investment) Transfer Form***" must be used. Otherwise, an e-mail to the Council Bookkeeper will suffice.

6. Expenses (Paying the Bills)

There are a number of possible methods for engaging the Council in the payment of bills/expenses of an event. These are:

1. Team Member Expense Claims – ***(See # 7 "Volunteer Expense Claims" in this document).***
2. Advances – ***(See #8 "Advance Funding" in this document)***.
3. Invoices – when possible, request that vendors to provide an invoice for the products or services provided. To ensure proper approvals regardless of who on the committee is working with the vendor, the event must have a designated individual who will receive the invoices. Payment of invoices use the following steps:
    i. Invoices from Vendors are provided to an event designate (e.g. Event Treasurer) for payment approval.
    ii. Designate is responsible for forwarding to the Council Bookkeeper and identifying the event name and recommending the account code.
    iii. Payment made as instructed and amount posted to the Event's expense account line.
4. Refunds – will only be done with expressed written request from the Event Chair or designate.

7. Volunteer Expense Claims

Once the event budget is approved, some members of the Event Committee may incur personal expenses that require reimbursement. REIMBURSEMENT UNDER THESE CASES WILL ONLY BE PERMITTED IF THE RELATED EXPENSES HAVE BEEN INCLUDED IN THE APPROVED BUDGET. Council has an Expense Claim form called the "***Event Expense Report***" for this purpose.

Approval requirements for submitted expenses:

a) Team Members (not including Event Chair) – approved by Event Chair
b) Event Chair – approved by member of the Key 3 (or agent, if one was appointed)

8. Advance Funding

Defined as - funds forwarded (advanced) to an individual to pay for event expenses that they could not otherwise afford to pay out-of-pocket (e.g. A Scouter who is purchasing $800 worth of groceries for an event but does not have the money to pay for the purchase = needs advance). This individual is solely responsible and accountable for the management and reporting on use of these funds to the Event Chair or designate.

Advance Funding Process:

1. Event budget must be prior approved.
2. Event Chair or approved designate (i.e. Event Treasurer) sends a written request (e-mail sufficient) to the Council Accountant approving the advance with details of: the advance recipient, their mailing address, e-mail

address, purpose of the advance, and any other special instructions (e.g. pick-up at Council office, hand-deliver by another individual)

3. The Council Accountant cuts the cheque (on the next weekly cheque run) and provides cheque to the individual in the manner outlined in the instructions. The cheque recipient will be sent the "***Advance Reconciliation Report***" form (and process) by e-mail. The "advance" will be reflected against the event until such time that the report, receipts and remaining funds are returned to the Council Bookkeeper and the expenses can be properly assigned.

The "***Advance Funding***" (payment before expense) process is not to be confused with the "***Volunteer Expense Claim***" (payment after expense) process that is designed to reimburse volunteers for expenses incurred in the preparation for the event ***(see #8 below)***.

9. Purchases of Event Memorabilia (e.g. crests, t-shirts, ball caps, etc.)

These types of budgeted items are greatly affected by participant and Volunteer/Offer of Service (OOS) numbers. Orders cannot be made until budget approved. Some conditions may be applied by Key 3. Orders must be placed with only Scouts Canada authorized suppliers.

10. Financial Reporting from Council

There will be two parts to the financial report that will come from Council about an event:

a) an income statement of revenue over expenses, and
b) a "trial balance" report of all transactions against the revenue and expense account lines.

The Council Office will be able to provide a full financial report shortly after the conclusion of the event. However the completeness of that financial reporting will be a direct result of the Event Committee's ability to bring to resolution all outstanding financial issues (e.g. expense claims, invoices, uncollected revenues, donations, etc.).

11. Event Deficits

If an event loses money, the level at which the event was hosted (i.e. Council or Area) is responsible for covering shortfalls out of the various funds that they control. If the event was an Area-level event, but the Area does not have any funds to cover the shortfall, then the Council covers any outstanding expenses, and the Area financial statements will reflect the amount owing to Council.

12. Event Surplus

A common misconception made when a surplus occurs is that the Event Committee gets to decide what to do with the surplus proceeds. The Event Team certainly needs to be congratulated on their fiscal management of the event, but there are two points to indicate why they do not decide on the redirection of surpluses: **1)** The "prevailing principles" identified at the start of this document, and **2)** the rationale that if the hosting body is to assume responsibility for an event deficit, it stands to reason that they also assume acceptance of an event surpluses. The committee can of course "recommend" ideas to the Key 3.

Similar to "event deficits", when an event has a surplus of revenue over expenses, the hosting body (Area or Council) will benefit from this additional revenue as determined by the Key 3. Before the end of the fiscal year (August 31) any surpluses would be rolled up into general operations funds for the hosting body. This is especially true if the hosting body provided seed money to subsidized the event (which would appear in the budget) or provided a starter loan (which would be paid back as replaced by event revenues).

13. Event Timelines

The following charts outlines the 15 steps discussed in this document from "deciding on an event" to "wrap-up and final reporting".

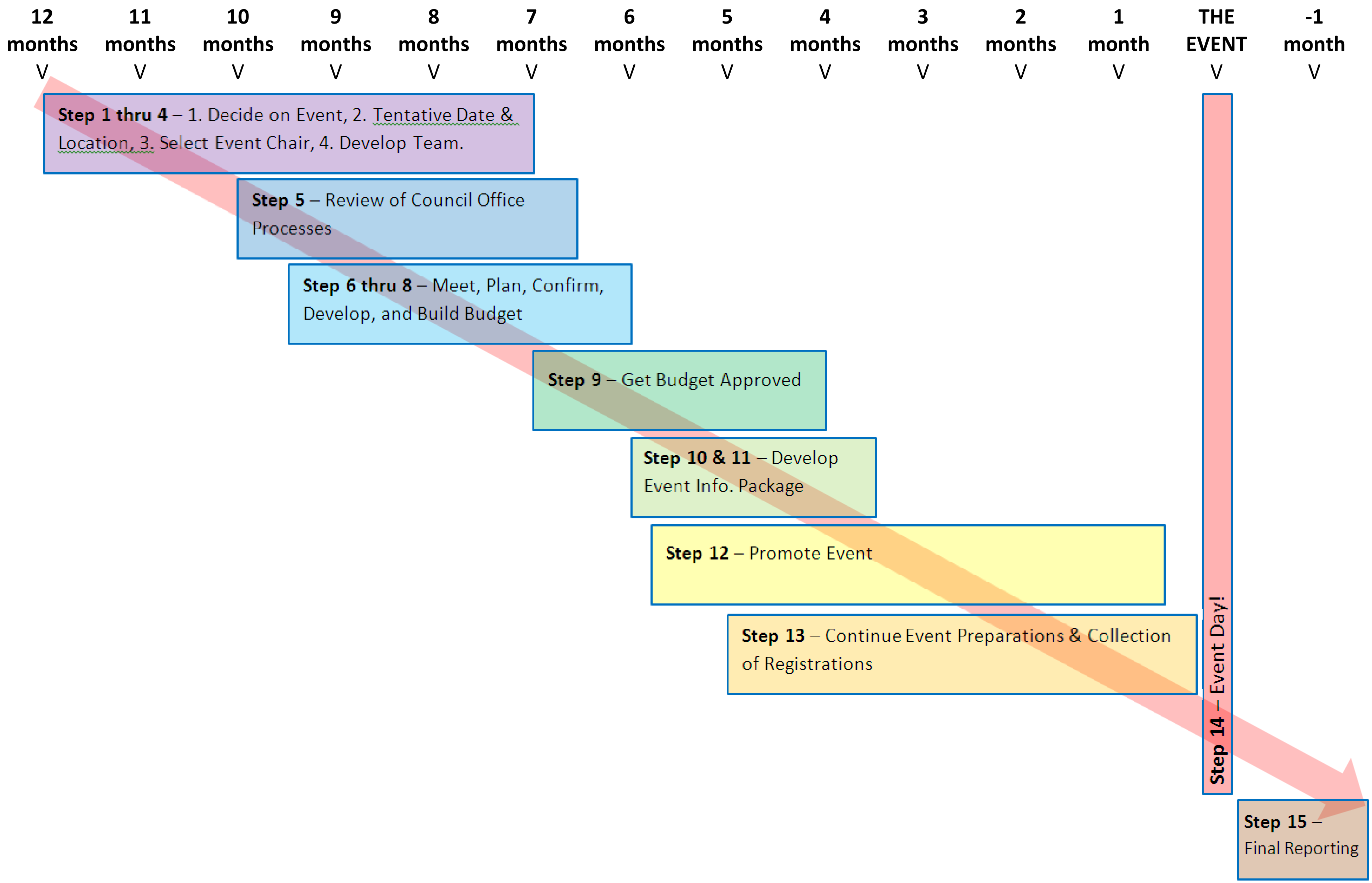
Related Forms/Resources & Purpose

The Council office has developed a number of forms/resources to assist with the administrative responsibilities in preparing for and seeing an event to its conclusion. This information is available on the Council website, but can also be sent out as an event kit.

1. **Engaging the Council Office for Council and Area Events** – this document
2. **Event Registration Form** – Standardized form to save time and make registration administration easier
3. **Training Application Form** – Standardized form to save time and make registration easier
4. **Event Attendance List** – Standardized form to confirm attendees
5. **Event Budget template** – Auto-calculating template good for ALL events (program, training, ceremonies) from Group to Council
6. **Event Expense Report** – Required to reimburse a team member for out-of-pocket expenses
7. **Charitable Tax Receipt Request** – For donations requiring a Charitable Tax Receipt
8. **Advance Reconciliation Report** – Required for reconciling advanced funds spent by an individual
9. **Restricted Funds (Investment) Transfer Form** – Required to transfer funds from an investment fund to an event (operating) fund

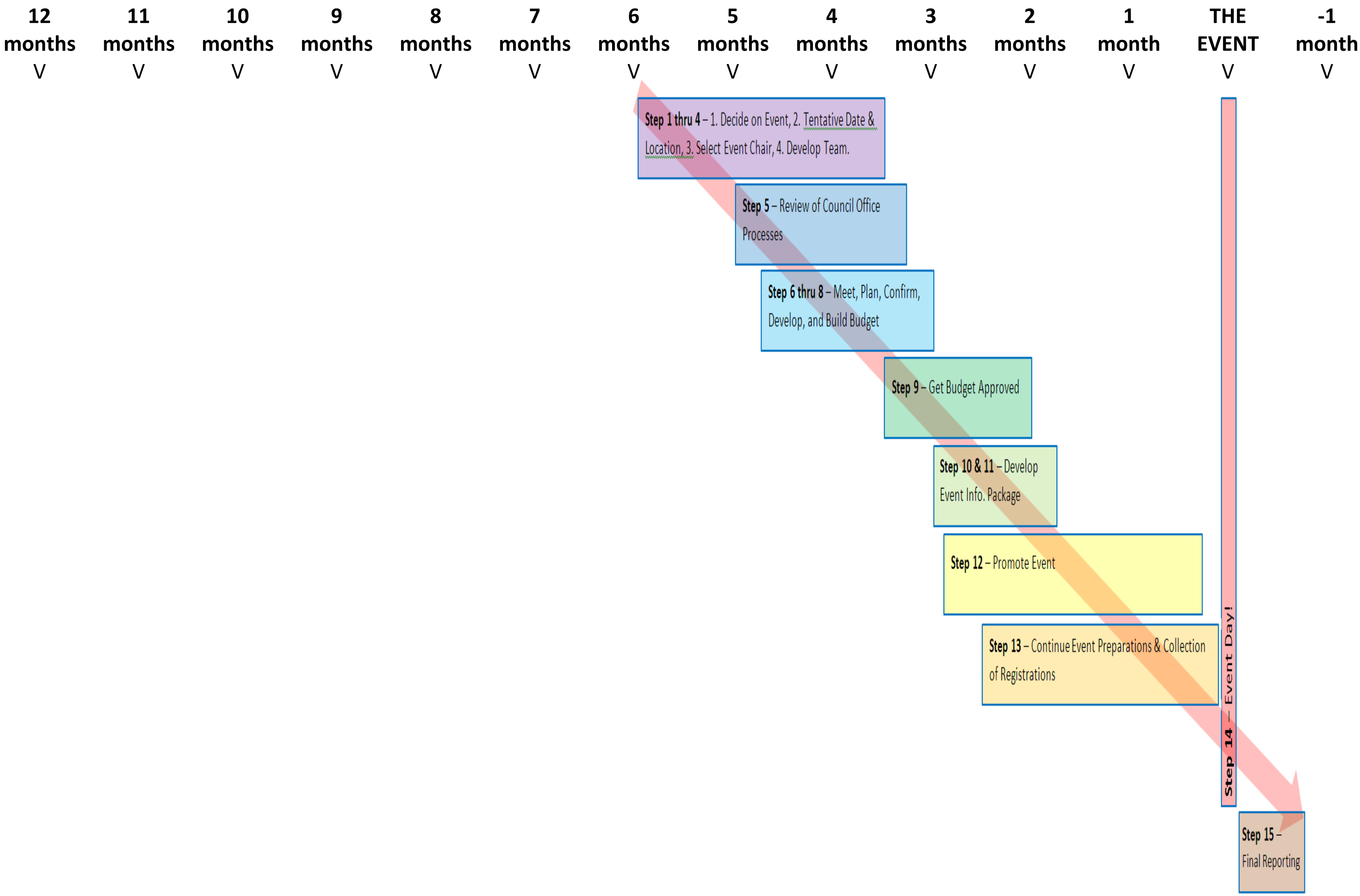
Event Timelines (12-months lead time to Event):

Depending on the size and complexity of the event in question, will determine how much time is required to complete each of the steps as illustrated below. The following is based on a 13-month planning period (12 months prior to Event and 1 month after), however shorter planning periods will require steps to be accomplished quicker. The faster that a step is accomplished permits the next step to begin. The grade of the red arrow represents urgency through the steps.



Event Timelines (6-months lead time to Event):

Program planning and promotion time for the event is greatly reduced.



Registration

EVENT REGISTRATION FORM

For events which Council is supporting administratively (i.e. collecting registration & fees)

For Office Use Only — Date: / Receipt #: / Amount Paid:

Council Office Contact Information — Ph (local Ottawa) - (613) 225-2770 / Ph (Long Dist.) - 1 (888) 726-8876 / Fax (613) 225-2802 / Email: events-ottawa@scouts.ca

Organizers Complete Everything In Yellow (including parts of the Registrant Section)

SELECT COUNCIL: ☐ NORTHERN ONTARIO COUNCIL ☐ VOYAGEUR COUNCIL ☐ CONSEIL du QUÉBEC QUÉBEC COUNCIL

Is this a Council-level Event? ☐ YES (see above) ☐ NO (complete next line)

Is this an Area-level Event? If Yes, please specify Area →

Event Name: Acct Code:

Event Date: Other (if required):

Event Contact: Event Contact E-mail or Phone:

Important Announcement(s) to Registrants (if nothing, delete all text from the following space):

(e.g. Special pre-order offer of event collateral – T-shirts, ball-caps – order form in event package. Please submit form and payment with this Registration Form and payment.)

REGISTRATION DEADLINE:

Registrants Complete This Section

The Event Information Package will contain all details. Questions? Please direct to the Organizers, not the Council office.

Affiliation: ☐ ←Scouts Canada ☐ ←Girl Guides of Canada ☐ ←Other (e.g. BSA)

Group Name: Section:

Contact Name: Phone #:

Contact E-mail: Today's Date:

Event Fees Calculation:

Attendee Categories Below	# of		EARLY FEE [Enter Date]	or	FULL FEE [Enter Date]		Subtotals
(e.g. Participants):		X	$	or	$	=	$
(e.g. Volunteers):		X	$	or	$	=	$
(e.g. Parents):		X	$	or	$	=	$
		X	$	or	$	=	$

Submit Payment for this Amount → $

Make Cheque Payable to → "Scouts Canada"

Send Registration and Payment to: 1345 Baseline Rd., Suite 200, Ottawa, ON, K2C 0A7

Council Office will confirm receipt of registration & payment with the contact identified above.

Faxed or e-mailed forms only indicate intent, but do not constitute a confirmed registration until payment is received (see contact info above). Under extreme exceptions, alternate payment arrangements (i.e. credit card) may be permitted. Scouts Canada Groups are required to pay with Group cheques.

EVENT ATTENDANCE LIST

For events which Council is supporting administratively (i.e. collecting registration & fees)

For Office Use Only — Date: / Receipt #: / Amount Paid:

Council Office Contact Information — Ph (local Ottawa) - (613) 225-2770 / Ph (Long Dist.) - 1 (888) 726-8876 / Fax (613) 225-2802 / Email: events-ottawa@scouts.ca

Organizers Complete Everything In Yellow

SELECT COUNCIL: ☐ NORTHERN ONTARIO COUNCIL ☐ VOYAGEUR COUNCIL ☐ CONSEIL du QUÉBEC QUÉBEC COUNCIL

Event Name:

Event Date: Other (if required):

REGISTRATION DEADLINE:

Registrants Complete This Section

Please list the names of all Participants and Volunteers that will attend this event. All Scouts Canada attendees MUST be fully Registered and "Active" members. Other affiliation members are responsible for meeting their Organization's requirements.

Affiliation: ☐ ←Scouts Canada ☐ ←Girl Guides of Canada ☐ ←Other (e.g. BSA)

Group Name: Contact Name:

Volunteers:

Participants:

Mail to: 1345 Baseline Rd., Suite 200, Ottawa, ON, K2C 0A7 or by e-mail: events-ottawa@scouts.ca

Faxed or e-mailed forms only indicate intent, but do not constitute a confirmed registration until payment is received (see contact info above).

Financial Resources/Reports

Event Budget Worksheet

Complete all yellow boxes. Print and Attach "Budget Detail". This proposed budget must be approved by the Commissioner.

Name of Event: Date of Event:

Hosted By: (Council/Area/Group) Phone:

Person In Charge: E-mail:

Budget Result >>>>>>>> SURPLUS $0.00

REVENUE (Only use those line items that apply) # of Addendees

Event Fees (various options):

Participation Fees (charge per participant)	$ -	X	0	=	$ -
Group Fees (charge per Group)	$ -	X	0	=	$ -
Other:	$ -	X	0	=	$ -
Other:	$ -	X	0	=	$ -
Scouting-Level Contributions (e.g. Group, Area, Council)	$ -			=	$ -
Cash Donations (external)	$ -			=	$ -
Other Source:	$ -			=	$ -
Other Source:	$ -			=	$ -

Total Revenue: $ -

EXPENSES (Enter expense amounts using the "Budget Details" worksheet)

Contingency (unanticipated expenses): SET PERCENTAGE: = 10%	$ -
Food	$ -
Program Supplies	$ -
Equipment Rental	$ -
Equipment Purchase	$ -
Transportation	$ -
Occupancy	$ -
Admission Costs	$ -
Meetings	$ -
Mileage Reimbursement	$ -
Recognition	$ -
Administration	$ -
Insurance	$ -
Advertising & Promotion	$ -
Training/Development	$ -
Other 1 (Enter Item Name in Blue Box)	$ -
Other 2 (Enter Item Name in Blue Box)	$ -
Other 3 (Enter Item Name in Blue Box)	$ -

Total Expenses: $ -

Approval by Commissioner: (Commissioner can e-mail this budget as an attachment to provide confirmation of approval in lieu of signing.)

Name: Signature: Date:

April 19, 2013 (event)

ADVANCE RECONCILIATION REPORT - SSC (Ottawa)

Date Received: office use only

See below for process. This report must be APPROVED (signed or confirmation e-mail) by the Event Chair or designate. ATTACH ALL "ORIGINAL" RECEIPTS TO THIS FORM. If more lines are required, please attach additional reports.

Council/Area:

Name: Event/Activity:

Address: Event Code:

DATE	DETAILED DESCRIPTION: (helps match receipts) (eg. Sobey's - food purchase).	$ AMOUNT (including tax)	HST	GST 50% of 5%	PST 82% of 8%	NET	Office Use ACCT CODE
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
	TOTAL Expenses	0.00	0.00	0.00	0.00	0.00	

Amount of Advance 0.00

Total Advance Used 0.00

Advance Remaining 0.00

Option A: submit cheque with this report — or — Option B: Remaining amount carried over. Additional advace requested. Complete bottom of form.

I certify that these expenses were necessarily incurred on the business of Scouts Canada.

Signature: Date: Approved by:

Option B

I am authorizing an additional ______ to be advanced to the above named individual. Approved by:

EVENT EXPENSE REPORT - SSC (Ottawa)

Date Received: office use only

Ensure that the DEPARTMENT HEAD has APPROVED (signed or confirmation e-mail) these EXPENSES. ATTACH ALL "ORIGINAL" RECEIPTS TO THIS FORM. If more lines are required, please attach additional reports.

Council/Area:

Name: Event:

Address: Event Code:

DATE	DETAILED DESCRIPTION: (helps match receipts) (eg. Tim Hortons - Lunch for Service Team Meeting).	$ AMOUNT (including tax)	HST	GST 50% of 5%	PST 82% of 8%	NET	Office Use ACCT CODE
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
				0.00	0.00	0.00	
	TOTAL Expenses	0.00	0.00	0.00	0.00	0.00	

I certify that these expenses were necessarily incurred on the business of Scouts Canada.

Signature: Date: Approved by:

Charitable Tax Receipt Request

Effective – September 2014

Scouting Service Centre (Ottawa)

1345 Baseline Rd., Suite 200, Ottawa, ON., K2C 0A7

Office Use Only — Office Date Stamp / Confirmation Date

Donor Summary Form

Select Council: ☐ NORTHERN ONTARIO COUNCIL ☐ VOYAGEUR COUNCIL ☐ CONSEIL du QUÉBEC QUÉBEC COUNCIL

Group/Area: Date Submitted:

Donor Name (print clearly)	Donor Address (include Postal Code)	Purpose of Donation	Donation Type	Amount Donated
			☐ Cash ☐ Cheque	
			☐ Cash ☐ Cheque	
			☐ Cash ☐ Cheque	
			☐ Cash ☐ Cheque	
			☐ Cash ☐ Cheque	
			☐ Cash ☐ Cheque	
			☐ Cash ☐ Cheque	
			☐ Cash ☐ Cheque	
			☐ Cash ☐ Cheque	
			☐ Cash ☐ Cheque	
			☐ Cash ☐ Cheque	
			☐ Cash ☐ Cheque	
			Total Donations =	

Person Submitting this Request

Contact Phone:

Contact E-mail:

For Group donations, return cheques will be made payable to the Group indicated above.

For Area donations, please indicate deposit account #

#: