



JTE 2.0

Checklist Examples:

- ❖ **Program Planning**
 - ❖ **Budget Planning**
 - ❖ **Communication Planning**
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Example Checklist for Unit Program Plan

Example 1

Most calendar planning is based on history and unit traditions. Units do not re-invent their program, they mostly repeat what they have done. This is OK as long as the program attracts and retains Scouts. If not, a more in-depth review of the calendar may be necessary.

1. Document the activities and meetings you did last year (or the last two years).
2. Populate your calendar with holiday, local school and charter organization activity dates that would preclude a majority of your families from participating in unit activities
3. How much do we include the Scouts in on the program plan?
 - a) Decide what activities and meetings you are going to repeat. For most units, summer camp is always a fixed week and place. The other monthly campouts are not so ridged but the dates may be fixed (e.g. second weekend of the month).
4. Analyze how many new activities and meetings are needed.
5. Populate your calendar with council and district activities that your unit will be participating in this year, if any.
 - a) Look for new places to go or activities! How can we improve our program?
 - b) Assign responsibility to both Scouts and Scouters. Who is going to do what?
 - c) Allow for Scouts to make mistakes, but do not allow the unit to fail.

Example 2

These are events to be considered for inclusion in the Unit Calendar. Information push based on Unit type.

**A unit would declare their type before beginning the calendar process*

**A unit would be able to move any event off of their pre-populated calendar when they are completing their unit calendar*

PACKS	TROOPS	TEAMS	CREWS/SHIPS
HOLIDAYS			
Rosh Hashanah	Rosh Hashanah	Rosh Hashanah	Rosh Hashanah
Yom Kippur	Yom Kippur	Yom Kippur	Yom Kippur
Christmas	Christmas	Christmas	Christmas
Easter	Easter	Easter	Easter
SCHOOL DISTRICT DATES			
Fall Open House	Fall Open House	Fall Open House	Fall Open House
First Day of School	First Day of School	First Day of School	First Day of School
Holidays	Holidays	Holidays	Holidays
Winter Break	Winter Break	Winter Break	Winter Break
In Service Days	In Service Days	In Service Days	In Service Days
Spring Break	Spring Break	Spring Break	Spring Break
Last day of School	Last day of School	Last day of School	Last day of School
COUNCIL EVENTS			
Fall Wood Badge	Fall Wood Badge	Fall Wood Badge	Fall Wood Badge
Spring Wood Badge	Spring Wood Badge	Spring Wood Badge	Spring Wood Badge
Fall Univ of Scouting	Fall Univ of Scouting	Fall Univ of Scouting	Fall Univ of Scouting
Spring Univ of Scouting	Spring Univ of Scouting	Spring Univ of Scouting	Spring Univ of Scouting
SNFS	SNFS	SNFS	SNFS
Popcorn sales	Popcorn sales	Popcorn sales	Popcorn sales
Camp Card sales	Camp Card sales	Camp Card sales	Camp Card sales
Council Pinewood Derby	CYCLE	CYCLE	CYCLE
	OA Vigil Weekend	Grey Wolf	Venturing Camporee
	OA Section Conclave		Grey Wolf
	Grey Wolf		Venturing Week at Summer Camp
DISTRICT EVENTS (sample of Metro Lakes)			
Fall District Camporee	Fall District Camporee	Fall District Camporee	Fall District Camporee
Spring District Camporee	Spring District Camporee	Spring District Camporee	Spring District Camporee
Scouting for Food	Scouting for Food	Scouting for Food	Scouting for Food
Re-charter turn-in	Re-charter turn-in	Re-charter turn-in	Re-charter turn-in
Roundtable	Roundtable	Roundtable	Roundtable
Pinewood Derby	Klondike Derby	Klondike Derby	Klondike Derby
UNIT EVENTS			
Community Service	Community Service	Community Service	Community Service
FOS Presentation	FOS Presentation	FOS Presentation	FOS Presentation
Annual Planning Mtg	Annual Planning Mtg	Annual Planning Mtg	Annual Planning Mtg
New Leader Training	New Leader Training	New Leader Training	New Leader Training
Fundraising	Fundraising	Fundraising	Fundraising
Blue & Gold Banquet	Short Term Campout	Short Term Campout	Short Term Campout
Pinewood Derby	OA Election	OA Election	Youth Leadership Election
Summer Resident Camp	Youth Leadership Election	Youth Leadership Election	High Adventure
Summer Activity	High Adventure	High Adventure	Crew Meeting
Pack Meeting	Troop Meeting	Team Meeting	Joint Crew/Troop Activity
Awards Presentation	PLC	Joint Team/Troop Activity	Youth Leadership Training

PACKS	TROOPS	TEAMS	CREWS/SHIPS
Webelos to Scout Crossover	Court of Honor	Youth Leadership Training	Banquet
Arrow of Light Ceremony	Webelos to Scout Crossover	Banquet	Summer Camp
Joint Pack/Troop Activity	Joint Pack/Troop Activity	Summer Camp	
Outdoor Activities	Youth Leadership Training		
Den Meetings (locations)	Banquet		
Committee Meetings	Summer Camp		
Boy Talks/Open House			
Polar Camp			

Example Checklist for Unit Funding/Budget Plan

- 1) Start with last year's expenses. Layout what you spent by event and by other significant categories (e.g. awards, banquets, etc.).
- 2) Layout the funds you took in and how the unit obtained those funds. Can you expect the same this year?
- 3) How much money were you under or over? Did you have to keep asking for more funds from parents or Scouts?
- 4) How much money do you need to start the program year?
- 5) Line up the funding plan with the program plan. Have all activities and meetings that have an associated cost been accounted for in the funding plan?
- 6) What are your long range expenses, such as new equipment? Is this consistent with other units at your charter organization? Have you considered contacting other units to identify if they are selling any items you are interested in?
- 7) Do you have any more expensive items (e.g. unit trailer) coming up in the next year?
- 8) How much money does the unit need to properly fund the program plan?
- 9) How do we obtain that money? Assess parents and/or Scouts, fund raiser, etc.? Does the unit establish a fundraising/contribution goal per Scout?
- 10) How much do we include the Scouts in on budget issues?
- 11) Does the unit have individual Scout accounts?
- 12) What if the units has extra or not enough funds?
- 13) How do you fund Den/Patrol activities? How much and from where?

Example Checklist & Considerations for Unit Communication Plan

Example 1

1. What is the order of communications in the unit?
 - a) Troops:
SM --> scouts --> parents --> Committee,
SPL --> Scouts --> SM/Committee --> parents,
SM --> Parents --> Committee --> Scouts
 - b) Packs:
CM --> Den Leaders --> parents --> Scouts,
CM/Committee --> parents,
CM --> Parents --> Committee --> Scouts
2. What are the effective methods of communications that our stakeholders engage in?
 - E-mail, Web site, social media, phone tree, mailed flyer, Newsletter, published calendar, on-line calendar.
 - Do we have any recommended tools such as Yahoo groups, Google groups, iCal, etc?
3. Did the unit consider that people communicate differently?
 - Some electronic, some by reading, some by voice only, some by only short bursts.
4. Has the unit communicated the preferred or primary communication method for the unit?
5. How in advance does the unit communicate to interested parties?
 - Dates(6 months), where (3 months), details (1month)
6. How does the unit know everybody is getting the word? How effective are our communications?
7. How does the unit address communicating last minute changes or cancellations?
8. Troops: Do we have a safety net in place so Scouts communicate and parents get separate notices? This way scouts develop their communication skills.

Example 2

A. Steps to Communicating with your Unit

1. Gather contact information thoroughly and quickly. Remember to ask families as well as take the information from the application. Often there are additional email addresses that they use beyond what they put on the application. A current and complete contact list is crucial.
2. Choose a method of communicating (or a couple), both actively and passively. It is as important to have a way to post regular information as well as communicate more timely information. Try Shutterfly, Toolkit, Outlook, CubTrails, etc. Consider all your communication needs: a current calendar, a way to reach families, a place to post photos and advancement information. Possibly the best place for posting information is a unit website, consider asking for a volunteer to manage this. (This is a place that the council could really help – providing guidance or a template would help units dramatically – I'm not sure many units even know they can or should have their own site.)
3. Choose a communicator or two. This could be the Committee Chair or Cub/Scoutmaster, but it could also be a Secretary. It is good to have just one or two people sending out information (so families recognize and open the emails). Have other volunteers draft communications to be sent by the key communicators. (ie Camp Chair can draft email regarding camp and the Committee Chair or CubMaster could send out).
4. Communicate regularly, but not too often. Consolidate topics into regular communication, maybe a monthly email or newsletter. Sending too many communications becomes overwhelming and messages get overlooked. Sending too few and families may miss the communication because they don't recognize the contact.
5. Communication is two way. Always have a contact list available to the families and scouts so they can know how to contact leadership about any questions or issues.
6. Always be on the lookout for new apps, websites, tools that can help with this process. (Note, this is where we could have a council task force do some legwork to compare some of the many options out there.)
7. Poll your unit regularly to see if they are getting the information they need.

B. Checklist

- Gather new family contact information in September
- Enter contact information into Communication Tool(s) in September
- Poll Unit to ensure they are receiving communication in October
- Update current family contact information in October (with recharter due Nov. 15)
- Delete transitioning Webelos off Communication Tool in February

C. Plan

Communication	Who Sends	To Whom	Communication Tool	When
School Year Calendar	CC	Leaders	Email	August
School Year Calendar	CM	All Unit	Post to Shutterfly	September
Pack Meeting notes	CC	All Unit	Email	Weekend before meeting
General Pack Meeting Reminder	CM	All Unit	Email from Shutterfly	3 days before meeting
Den Meeting Reminder	DL	Den	Email	5 days before meeting
Polar Camp Information	CC	All Unit	Email	2 months before camp
FOS	CC	All Unit	Email	January
Lakeville Cleanup	CC	All Unit	Email	3 weeks prior
Rocket Launch	CC	All Unit	Email	3 weeks prior
Summer Camp Information	CC	All Unit	Email	Starting 3 months before camp
Fundraising	CC	All Unit	Email	1 week prior to deadlines
Pinewood Derby	CM	All Unit	Email	2 weeks prior to impound
District/Council Derby	CM	Applicable scouts	Email	3 weeks prior to derby

Committee Chair & Unit Commissioner
Example of Monthly JTE Discussion Points, May-April Cycle

When	Who	Developing the Program	Delivering the Program	
May	CC	Which youth and adults will be participating in the annual unit planning meeting?		
	UC	What district and council dates do you have on your annual program plan?		
June	CC	What programs and activities should I include to enhance my Scouting program?		
	UC	How much is your budget per Scout? How often will you communication with families?		
July	CC	What programs and activities should I include to enhance my Scouting program?		
	UC	How much is your budget per Scout? How often will you communication with families?		
August (Prgm, Budget & Comm Plans due 8/15)	CC	What other programs and activities should I consider to attract and retain youth?		
	UC	Which adults have volunteered to assist with School Night for Scouting?		
September (SNFS 9/18)	CC	How do I increase my support network to deliver a quality program?		
	UC	Which adult leaders are not trained for their position? When will they be trained?		
October (Training due 10/15)	CC	What district resources should I take advantage of to deliver a quality program?		
	UC	When will your unit recharter be submitted?		
November (Recharter due 11/15)	CC			How can I increase the level of support to deliver the program to the level I was expecting at the beginning of the year?
	UC			How often are you communicating with families? Is this in-line with the communication plan?
December	CC			How can I encourage youth advancement and participation in unit activities?
	UC			Are all of the adults delivering a quality program to your Scouts? Which adults are not trained?
January	CC			How accurate is the annual budget so far?
	UC			What were some troubles with unit recharter?
February	CC			How often are you communicating with families? Is this in-line with the communication plan?
	UC			What would you do differently with your annual program plan?
March	CC		Which adults could benefit from additional training opportunities?	
	UC		Which adults should be approached for additional unit service opportunities next year?	
April	CC		How should I communicate with families the value of the scheduled summer activities?	
	UC		How much money will you carry over for next year?	