



# Monmouth Council, BSA Course Director's User Guide



## 1. Introduction

The job of the Council Training Committee is training leaders, not just running training courses. Similarly, the job of Course Director extends beyond just running a successful training event. Like any other job in Scouting, it isn't done until the paperwork is complete.

For training to be successful in the MCBSA, there must be continuity and consistency in our various course offerings. To that end, the discipline of documenting, in a timely manner, all of the efforts that are necessary to run a successful training course is a must.

### 1.1 Purpose

The purpose of this document is to provide a single source of guidance for Course Directors. However, the contents of this document should not be viewed simply as a collection of rules. This document is intended to provide useful tools and templates. Further, by consistently using the same type of documentation for all of our training courses we will better be able to compare techniques, analyze results, and apply lessons learned to future offerings. The net result will be that we will be making the job of Course Director easier to manage and a less daunting task for those who do that job for the first time.

### 1.2 Scope

This document is intended to be used by Course Directors of all MCBSA training events. The actual application of the tools and templates contained herein will vary somewhat, depending upon the complexity of the training course, but the basic requirement for their use applies to all of our training events.

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### **2. Calendar Planning**

A successful course requires significant planning. Even relatively simple courses require advance preparation. The table below shows the actions that should be taken and their timing, relative to the date of the course.

#### **Back-Dated Calendar of Events**

<b>Action to be Taken</b>	<b>Days * relative to course</b>
Recruit Assistant Course Director (to be next CD for this event)	-180
Verify date(s) listed on the MCBSA calendar	-180
Reserve facilities	-180
Gather course material, including latest course syllabus	-180
Recruit staff	-150
Submit draft budget to Training Committee for approval	-120
Submit draft promotional flyer to Training Committee for approval	-120
Verify that MCBSA Training web site has accurate information on the course	-120
Prepare article for MCBSA Scouting Trail (optional)	-75
Distribute flyer/registration form at RTs and in unit mailboxes	-60
Post flyer/registration form on the MCBSA web site	-60
Provide copy of registration form to MCBSA Service Center staff	-60
Conduct staff development **	-45
Order consignment items for trading post from Scout Shop	-45
Review facilities needs with QHSR Ranger or manager of other facility	-10
Conduct course	0
Return unsold consignment material and money collected to Scout Shop	+5
Send Thank You letters	+5
Report participants and staff to Training Committee & MCBSA Service Center	+30
Submit final report (including financial report) to Training Committee	+60

\* **Note 1:** the actual number of days relative to the event will vary according to the complexity of the course.

\*\* **Note 2:** the actual number of staff development sessions, and the amount of lead time required for each prior to the training event, will vary according to the complexity of the course. However, all courses should have at least one staff development session.

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### 3. Course Budget

The table below provides a template for planning a course budget and for reporting the actual income and expenses.

Note that 5% of the actual expenses should be recorded for the use of MCBSA facilities and services, but the 10% contingency fee is intended to allow for coverage of unforeseen expenses and should not be recorded as an actual expense itself if not used.

#### Course Budget Template

<i>Monmouth Council, BSA – Course Name and Date</i>							
		<b>Budget</b>					<b>Actual</b>
No. of Participants		10	20	30	40	50	
No. of Staff (includes commissary)							
<b>INCOME:</b>							
Participants							
Staff Fee							
Late Fees							
Misc. Income & Donations for Equip. & Paraphernalia							
<b>TOTAL INCOME:</b>		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>EXPENSES:</b>							
	unit cost						
Mail / Promo / Copying							
Food (Staff Develop.) xx meals / person @ \$xx							
Food (Course) xx meals / person @ \$xx							
Hats							
Name Tags							
Notebook Binders (Participants)							
Wallet Certificates (Partic.) per sheet of 8							
Recognition Certificates							
Supplies from Service Center							
Miscellaneous (Equip., Program Supplies, Etc.) <i>(Propane stoves, bottles, charcoal, griddles or other equip.)</i>							
<b>SUBTOTAL EXPENSES:</b>							
Use of MCBSA facilities and services (5%)							
Monmouth Council Contingency Fee (10%)							xxxxx
<b>TOTAL EXPENSES:</b>							
<b>BALANCE:</b>							

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### **4. Refunds**

Given the diverse nature of the Training Courses that are offered by the MCBSA, it is not practical to have one all-encompassing refund policy. Rather, the following shall serve as guidance in the event that a pre-paid registrant decides not to participate in a course.

Determination of the applicability of refunds will be the responsibility of the individual Course Director. Assistance can be sought from the Council Training Committee Chairman and/or the Scout Executive, if necessary, but a refund of course registration fees will not be automatically provided.

Payments for registration fees may be transferred to another registrant for the same course. However, the canceling registrant must contact the MCBSA Service Center to request that such a transfer of registration fees occur.

If transferring registration fees is not an option, a refund can be made providing that advance notice has been received in a timely manner and that such refund will not adversely impact the financial stability of the course. In particular, if funds have been spent on behalf of a registrant, any refund will be adjusted accordingly.

## 5. Course Promotion and Registration

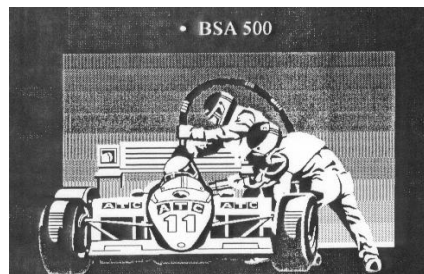
### Sample Promotional Flyer and Registration Form

#### ATTENTION PRESENTERS

*Do you hate standing up in front of an audience, any audience?  
Do you need to do an FOS presentation?  
Do you need to speak to the adults or scouts of your Pack, Troop, or Crew?  
Are you a youth or adult staff member for Summer Camp?  
Merit Badge Counselors - want to generate interest in your subject?  
**Do you want to gain confidence, improve your presentation skills and  
learn new techniques?***

If you answered "yes" to any of the above questions, then you should consider joining us at the:

### TRAINER DEVELOPMENT CONFERENCE



**February 2, 2002  
Performing Arts Center – Lots 1 & 2  
Brookdale Community College  
8:00am to 4:30pm**

Sign up now by completing and returning the registration form below by January 30, 2002. You can reserve a spot by calling the Council Service Center at 732-531-3636 or via e-mail to [monmouth@bsamail.org](mailto:monmouth@bsamail.org). The cost is \$5.00 and includes training materials. Additional resource materials will be available for purchase. Please bring a brownbag lunch. **Credit Card and Unit Account charges can only be done at Council. Only cash and checks will be accepted the day of the conference.**

Additional information can be obtained by calling the Council Service Center (732-531-3636), or me (732-431-5605).

Kathy Koping, Conference Director

**Trainer Development Conference - February 2, 2002**

Name \_\_\_\_\_ Phone \_\_\_\_\_

\_\_\_ Adults x \$5 = \$\_\_\_\_\_ Method of payment: \_\_\_ Cash \_\_\_ Check \_\_\_ Account charge-Unit# \_\_\_\_\_

**Mail to:** Monmouth Council, BSA Deal and Monmouth Roads, PO Box 188, Oakhurst, NJ 07755

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**Sample Course Attendance Records**



**Monmouth Council, BSA  
Boy Scout Leader Specific Training  
SM/SA Session**



*Please print legibly:*

Name	Dist	Unit	Position	Home Address	Home Phone	E-mail Address	Sess #1 9/xx/xx	Sess #2 10/xx/xx	Sess #3 10/xx/xx	Complete

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**Monmouth Council, BSA  
Cub Scout Leader Specific Training**



*Please print legibly:*

Name	Dist	Unit	Position	Home Address	Home Phone	E-mail Address	Session					Complete
							Tiger Den Leader	Cub Den Leader	Web Den Leader	CM/CA	Pack Comm	

Note: the above examples are intended to show content only. Actual attendance forms probably should be printed in landscape format and have field sizes appropriate for the text to be entered.

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### **6. Medical Evaluations**

The policy of the MCBSA with regard to the requirement for medical evaluations for participation in a training course is in accordance with that of the National Council of the BSA. In particular, the requirement for any non-strenuous Scouting event of less than 72 hours duration is only for a medical history form, which does not have to be signed by a doctor.

While it is a good idea to encourage the participants and staff to use the same medical forms that they will need for other activities (e.g., summer camp), only the Class 1 Personal Health and Medical History form is required for most of the courses offered by the MCBSA, regardless of the age of the participant.

Since requiring a physical examination by a doctor may be a deterrent for some potential course participants, a Class 2 Medical Evaluation form (for participants under 40 years of age) or a Class 3 Personal Health and Medical Record Form (for participants 40 years of age or older) should be required only if high-adventure activity will be involved (e.g., for the Adult Basic Backpacking course).

Note, however, that according to national BSA policy the Class-3 form is required for all Wood Badge participants and staff, regardless of age.

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### 7. Course Evaluation

#### Sample Course Evaluation Form for Participants

Course Name: \_\_\_\_\_ Date: \_\_\_\_\_ Participant Name (optional) \_\_\_\_\_

*Circle one number for each question, using a rating system from 1 to 4 (1 = poor; 4 = excellent).  
A separate section is provided at the end of this form for written comments or suggestions.*

- |   | poor |   | excellent |   |
|---|------|---|-----------|---|
|   | 1    | 2 | 3         | 4 |
| 1. Were the learning objectives (stated at the beginning of the course) met?    | 1    | 2 | 3         | 4 |
| 2. Was the course run efficiently (started on time, breaks, ended on time)?     | 1    | 2 | 3         | 4 |
| 3. Did the facilities (space, seating, lighting, temperature) meet your needs?  | 1    | 2 | 3         | 4 |
| 4. Did the schedule date for this course meet your needs?                       | 1    | 2 | 3         | 4 |
| 5. Were pre-course announcements, notices, and descriptions accurate?           | 1    | 2 | 3         | 4 |
| 6. Did the course literature, materials, and equipment meet your needs?         | 1    | 2 | 3         | 4 |
| 7. How well was the staff prepared to deliver the course material?              | 1    | 2 | 3         | 4 |
| 8. Did "hands-on" activities allow for "learning by doing"?                     | 1    | 2 | 3         | 4 |
| 9. Did the course include opportunities for fun and fellowship?                 | 1    | 2 | 3         | 4 |
| 10. Did the food/beverages provided for this course meet your needs?            | 1    | 2 | 3         | 4 |
| 11. Did the course pace (length, activities, sequence) meet your needs?         | 1    | 2 | 3         | 4 |
| 12. Did the course content and depth meet your needs?                           | 1    | 2 | 3         | 4 |
| 13. Was appropriate recognition given to everyone who completed the course?     | 1    | 2 | 3         | 4 |
| 14. Would this course be useful for other members of your troop, pack, or crew? | 1    | 2 | 3         | 4 |
| 15. All things considered, how would you rate this course overall?              | 1    | 2 | 3         | 4 |
| 16. What was the most important thing you learned in this course?               |      |   |           |   |
| 17. What was the least important thing you learned in this course?              |      |   |           |   |

Please use the remaining space below and other side of this form for written comments or suggestions:



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**Sample Course Evaluation Form for Staff**

**Course Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_ **Name (optional)** \_\_\_\_\_

1. Did we meet the learning objectives of the conference? Yes \_\_\_ No \_\_\_  
If not, why not?
2. Did we start on time? Yes \_\_\_ No \_\_\_  
Did we stop on time? Yes \_\_\_ No \_\_\_  
If not, why not?
3. Was the facility adequate? Yes \_\_\_ No \_\_\_  
If no, what should be changed for the next time?
4. Was the schedule satisfactory? Yes \_\_\_ No \_\_\_  
If no, what should be changed for the next time?
5. Was the conference successfully promoted? Yes \_\_\_ No \_\_\_  
If no, what should be changed for the next time?
6. Were the literature, materials, and equipment adequate? Yes \_\_\_ No \_\_\_  
If no, what should be changed for the next time?
7. Were the room arrangements satisfactory? Yes \_\_\_ No \_\_\_  
If no, what should be changed for the next time?
8. Were the staff members well prepared? Yes \_\_\_ No \_\_\_  
If not, please explain.
9. Did the participants have a chance to learn by doing? Yes \_\_\_ No \_\_\_  
If not, why not?
10. Was there fun and fellowship? Yes \_\_\_ No \_\_\_  
If no, what should be changed for the next time?
11. Was appropriate recognition given to those who completed the conference? Yes \_\_\_ No \_\_\_  
If no, what should be changed for the next time?
12. What plans have been made to train the trainers who did not attend?
13. Please share any other suggestions that you have for improvement of the conference. Feel free to use additional paper if necessary.

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### 8. Course Completion Recognitions

It is important that all participants who successfully complete a course be recognized for their efforts. This recognition will not only serve to provide the participants with documented proof of their completion of the course, but will encourage them to participate in other Scouting training courses.

As a minimum, each participant who has successfully completed the course should be given a training recognition wallet card (# xxxx, available from the MCBSA Service Center). To make the distribution of these cards easier, a supply of rubber stamps is available from the Service Center for selected fields (e.g., xxxxxxxxxxxx).

If the course director deems it appropriate, certificates of achievement may be created as an additional means of recognition. Such certificates may be tailored to reflect the specific course, but should contain a reference to the Monmouth Council, BSA, the participant's name, the name and date(s) of the course, and be signed by the course director and the professional advisor to the Training Committee or the Scout Executive.

A sample certificate is shown below.

		
<h3>Certificate of Completion</h3> <p>This is to certify that</p> <p><i>xxx</i></p>		
		
<p>has successfully completed the National Course of Instruction in the <b>xxxxxxxxx Conference.</b> Presented on this xx day of xxxxxxxx, 200x</p>		
_____ <b>Course Director</b>		_____ <b>Professional Staff Advisor – Training</b>

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### **9. Template for Final Report**

The final report is to be submitted by the course director to the Training Committee within 60 days of course completion. In addition, working drafts of the report should be used for planning purposes and presented to the Training Committee for periodic review of the status of preparation for the course. The final report will serve: 1) to communicate the results of the course to the Training Committee and the MCBSA Executive Board; and 2) to provide a baseline for the next course director.

The amount of detail provided in the final report will vary according to the complexity of the course, but each of the topics outlined below should be addressed. If possible, the report should be delivered in both paper and electronic formats, to increase the probability of its successful dissemination and archiving.

**Course Name:** \_\_\_\_\_

**Course Dates and Location:** \_\_\_\_\_

#### **1. Course Summary**

This section should contain a brief description of the course, its purpose and scope, and the intended audience.

#### **2. Lessons Learned**

In this section, a description of what worked and what didn't work for this course should be given. Suggestions for improvements also should be included here. This will provide useful information for the course director of the next offering of this course, not only to avoid repetition of any mistakes but also to keep the course fresh and meeting the needs of the current participants.

#### **3. Planning Calendar**

All milestones, including the first meeting with the Training Committee to obtain approval of the selection of an assistant course director (ideally the person who will be the next course director for this course), budget planning and approval meetings, facility reservation dates, staff development sessions, course sessions, follow-on events (such as a post-course review with the staff), as well as any other critical dates, should be included in this section.

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### **4. Facility Reservation Forms**

It is important to complete and submit reservation forms for the facility to be used as early as possible to avoid conflicts with other events. Having the course dates listed on the MCBSA calendar is not sufficient to secure council facilities (e.g., Lawrence Lodge at QHSR). Reservation forms must be submitted to the MCBSA Service Center in Oakhurst. Copies of the completed forms should be included with the final report.

### **5. Staff List, With Roles and Responsibilities**

For relatively simple courses, a simple list of the staff members and their respective roles and responsibilities for the course is sufficient. For more complex courses, job descriptions should be provided. All supporting staff (both youth and adult) should be identified. Include name, home address, phone number(s), and e-mail address (if available).

### **6. Staff Development Agenda**

Staff development needs will vary, based on the complexity of the course. However, even relatively small one-day courses will benefit from the team building that a carefully planned staff development process provides. Staff development should be used to ensure that all staff members for the course are coordinated in their approach. Topics that should be covered during staff development include, but are not limited to: staff assignments, setting the example (including uniforming), course session topics, review of the course syllabus, and presentation format, technique, and timing.

### **7. Participant-Invitation and Registration Form**

Copies of the letter of invitation for course participants and the registration form should be included. Articles for published in the Scouting Trail and other advertisements should be included as well.

### **8. Registration Procedure**

The registration procedure will probably be relatively straightforward for one-day courses, but for multiple-session courses the availability of make-up sessions should be addressed. Some items to consider here are: on-site collection of fees; nametags; course notebooks and/or hand-outs; and course completion certificates and wallet cards.

### **9. List of Participants**

Separate lists of in-council and out-of-council participants should be included. In-council participants should be listed according to district, for reporting to the respective district training committees. Participants who are good candidates for staff positions on future courses should be identified.

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The following information should be provided for all participants:

- Name;
- District (for MCBSA) or council (for out-of-council participants);
- Unit (type and number);
- Registered Scouting position;
- Home address;
- Home phone number;
- E-Mail address (optional);
- Course session type (e.g., Tiger Den Leader), if applicable;
- Course session number(s) completed (e.g., SM/SA #1), if applicable; and
- Course session completion date(s).

### **10. List of Staff**

Separate lists of in-council and out-of-council staff members should be included. In-council staff should be listed according to district, for reporting to the respective district training committees. Staff members who are good candidates for course director positions on future courses should be identified.

### **11. Course Schedule**

The course schedule should follow the course syllabus. Where changes have been made to accommodate local needs, these should be highlighted in the final report for the benefit of the subsequent course director. Session presenters and times should be shown on the schedule.

### **12. Summary of Participants' Evaluations**

The participants' comments from the evaluation forms should be summarized for the final report. Essay comments may be paraphrased, but use caution to provide the feedback as intended by the participants and not biased by editing.

### **13. Summary of Staff Evaluations**

Staff evaluations should be summarized as above for participant evaluations.

### **14. Sample Thank-You Letters**

It is important to recognize the support received by people such as: the Camp Ranger; donors of materials, photocopying services, certificates, etc.; and of course the staff members. A personal letter, signed by the Course Director and Scout Executive (or his

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representative), is a nice touch. Samples of such letters should be included in the report for the benefit of the next course director.

### **15. Financial Report**

The financial report should show the comparison of the budgeted and actual income and expenses for the course, plus the actual balance. Donated items should be clearly indicated, to assist in the budgeting process for the next offering of the course.

### **16. Conclusions and Recommendations**

This final section of the report should present a brief summary of any conclusions and/or recommendations not already covered in previous sections.