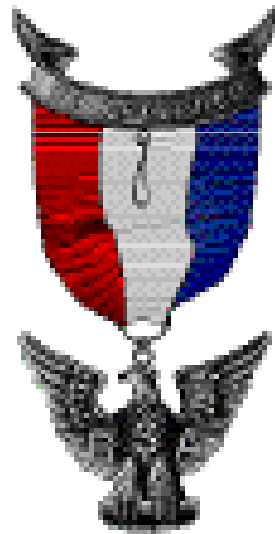# Eagle Scout
Service Project Fundamentals

University of Scouting 2017

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Agenda

- Starting Your Scout Off

- Workbook Overview

- Proposal Creation

- Proposal Processing

- Plan Creation

- Project Report and Approvals

- Things Leaders Should Know

Starting Your Scout Off

Troop Leadership Role

Educating The Life Scout

❑ **Make sure your Life Scout uses the current edition of the Eagle Scout Service Project Workbook**

- ▪ October 2015 printing is current today (date on front cover.)
- ▪ Download it from BSA National website:
  http://www.scouting.org/sitecore/content/home/boyscouts/advancementandawards/eagleworkbookprocedures.aspx

  Special downloading instructions are given – but are easy to follow.

  DO NOT just download publication 512-927 directly.

- ▪ Fillable PDF document.
- ▪ Has expandable text boxes.
- ▪ Can add and delete pictures, & provide captions.
- ▪ Provides Spelling and Grammar Checking.

Troop Leadership Role

Educating The Life Scout

<u>Eagle Scout Service Project Workbook</u>

❑ **Composed of both Rules and Forms**
- ▪ Rules include definitions and explanations
- ▪ Project Proposal, a form with explanations, and including
  - • Contact Information page - a form
  - • Scout Certification
  - • Requires four Proposal approvals, including your District's
- ▪ Project Plan - a form with explanations
- • Fundraising Application - a form - and its rules
  - • Requires three approvals, including council's)
- ▪ Project Report - requires two local approvals

Troop Leadership Role

Educating The Life Scout

❑ **Work with the Scout to make sure he understands what he has downloaded and needs to work with:**

- Make sure he understands the importance of the project in obtaining the rank of Eagle.
- Review the rules, and the content of the workbook forms, with both the Scout and his parents before he starts.
- Lay out project timeline expectations:
  - Proposal development, approvals, work completion and documentation may take 6 months or more.
- Review the form for each section of the workbook with the Scout before he starts each of the phases.

Troop Leadership Role

Educating The Life Scout

- ❑ **"Rules of the Game"**
    - ▪ <u>Guide to Advancement 2017</u> (GTA2017) explains the process and defines the full scope of the requirements.
        - * See Section 9: only 14 pages; well written, easy to read
    - ▪ Workbook rules are adapted from the more detailed GTA2017.
    - ▪ Eagle Projects do not take precedence over troop needs.
    - ▪ Two deep adult leadership, including YPT credentials, applies.
    - ▪ The Project cannot be a fundraiser in itself.
    - ▪ Money or materials collected for the Project must be used to accomplish the Project; any surplus becomes Beneficiary's.
    - ▪ Project fundraising should not compete with other efforts of the Unit, District or Council.

Troop Leadership Role

Educating The Life Scout

- ❑ **"Rules of the Game, continued"**
  - ▪ The Scout needs to demonstrate his leadership skills through the service project.
  - ▪ The project's impact on the community is a key factor.
  - ▪ Project proposals are not single-step Pass/Fail tests – Planning is an evolutionary multi-step process and highly integrated into the Project.
  - ▪ Reviews, recommendations, and approvals at unit and district levels are required. These take time.

Workbook Overview

The Workbook Introductory Section,
Front Cover and Pages 2 - 6

Explanations, Definitions, Rules

The Proposal Section:
A Cover Page & Proposal Pages A thru E

Page A has important Instructions.

Page B is the Contact Page.

The Scout's Proposal definition only takes
3 pages of formatted question and answer boxes.

Proposal Creation

Scout and Leader Responsibilities

Service Project Proposal

❑ **Front Cover of the Workbook**

- ▪ Fill in Scout Name and the Service Project Name – they replicate throughout the workbook

❑ **Contact Information**

- ▪ This information is useful to the Scout, Unit and District leaders
- ▪ Make sure these data are current, correct and complete
- ▪ Multiple sections have "constant" data – Troop should have a model
- ▪ A BSA registered Project Coach should be identified at this point.

❑ **When in doubt, ask !**

- ▪ Questions about the appropriateness of a particular Eagle Scout Service Project may be made to the District Advancement Committee.
- ▪ The Council and/or National Office may sometimes be consulted.

Proposal Contact Page

❑ **Emphasize the Usefulness of a Project Coach**

- Project Coach is identified by the unit leadership in HVC with input from the Scout; not assigned by the District or Council.

- He/she must be a registered Scouter with current Youth Protection credentials throughout the duration of the Project.

- The coach's role is to work with the Scout in developing his plan and to guide him in completing the sections in the workbook.

- The coach may also be a technical advisor.

- The coach is a voice of experience.

- Although the coach does not give signatory approval, his/her guidance and experience is invaluable to the success of the project.

- The coach does have a opportunity to make comments at the end of the Project Plan – and should.

The Parts of the Proposal

❑ **Project Description and Benefit**
- The request is to "Briefly describe the project."
  - Provide the basic ideas of the project
  - Not fact free: give some details – approximate size, estimated numbers, etc. This aids the reviewers.
  - Exhaustive detail is not required.
- Later sections will help to assess the scope of the project, its impact on the community, the opportunities for leadership, general resource requirements, safety issues, etc. – don't say more here than is requested.
- Pictures, diagrams, sketches, maps, etc. can be included. More than 2 images can be included. Put captions on the images.

Troop Leadership Role

the Parts of the Proposal –
Description and Benefit *(continued)*

❑ **Benefit**: The form asks how it will help and why it is needed.

- ▪ What will be the positive outcome?
- ▪ Why will the success of the project make a difference?
- ▪ Emphasize the goodness of the fix, not the severity of the problem

Troop Leadership Role

Project Proposal –
Description and Benefit *(continued)*

"When do you plan to begin work on the project?"
Simple Question – answer can be revealing

❑ **It's wrong to accept "Right after approval" as valid.**

❑ **Scout & Reviewers need to consider the impact of**:
- Planning
- Fundraising approval, if needed
- Actual Fundraising – do before starting work
- Troop activities
- School events or holidays

Troop Leadership Role

Project Proposal
Description and Benefit *(continued)*

"How long do you think it will take to complete?"

- ❑ **Adult experience can be useful**
  - ▪ Need to be adapted to workforce skills
  - ▪ Temper it with lower expectations
  - ▪ Factor in lack of experience
  - ▪ Factor in possible interrupts, e.g., weather
  - ▪ Have Scout consider impact of troop, school and personal activities.

Troop Leadership Role

The Parts of the Proposal, cont.

❑ **Giving Leadership**

  ▪ Approximately how many people?

  • Some may be just drivers, or needed for two-deep coverage

  • Make sure the number of people specified will fit in the work space while allowing for worker movement.

  • Technical/professional expertise needed will be identified in the Project Plan

  ▪ Where recruited? The Workbook itself lists types of people.

  But actual "where" can be instructive:

  • Are troop meetings being held? Is school in session?

  • Can a notice be put in the church bulletin, or the like?

  • Are you prepared to contact people by phone?

  ▪ What will be the leadership challenge?

  • Gives insight into Scout's attitude about leading

Service Project Proposal

❑ **Materials**

- List the "types of" materials which will become part of the finished project. (Advisory notes provided in workbook)
- Scouts may need advice on group or generic names.

❑ **Supplies**

- List the "kinds of" supplies (things that will be used up) which will be needed to complete the project. (Advisory notes provided in workbook)

❑ **Tools**

- Provide a reasonable idea (in a list) of tools or equipment, if any are needed, whether they will be borrowed, rented, or purchased.

Troop Leadership Role

Service Project Proposal

❑ **Other Needs**

- ▪ Identify "Services" or related costs (e.g., postage)
- ▪ Don't forget lunch

❑ Tip: The four sections above have companion sections in the full Project Plan; those sections are spreadsheets. If your Scout starts to fill those out / partially fills them out, paying attention only to the major needs and not the details of those needs, he could print those draft pages, and say "See attached" in the Proposal section !!

Troop Leadership Role

Service Project Proposal

❑ **Permits and Permissions**

- Notes provided should be self-explanatory.
- Make sure the Benefiting Organization (B.O.) will support permit requests, which they are responsible to get.
- Make sure the B.O. Rep has the authority to approve.

❑ **Preliminary Cost Estimate**

- Explain where the total of the money is coming from.
- Include ALL estimated costs and totals, even if you expect some of the materials to ultimately be donated.
- Discuss: Cost = Value = Expense

❑ **Project Phases**

- Note the guidelines in this section. Defining the project in 7-8 phases in reasonable. Defining the project in fewer stages is too general.

Service Project Proposal

❑ **Logistics**

  ▪ Seems self-explanatory – but consider carrying capacity of vehicles, and whether delivery is safer.

❑ **Safety Issues**

  ▪ Review ALL potential safety issues with the Scout.

  ▪ Plenty of risks beyond power tool use, e.g., dust, vapors, chemicals, sunburn, dehydration, ticks, scrapes, bruises

  ▪ Consult BSA resources *(e.g. Guide to Safe Scouting)*

❑ **Project Planning**

  ▪ This is a high level abstract challenge to a young Scout –

   • It asks, "What's your plan for a plan?"

   • Meaning, What do you need to learn in order to go on?

  ▪ A Project Coach is key here

Troop Leadership Role

Proposal Approvals

❑ **The Project Proposal must be carefully reviewed by the unit leadership**.

- Does it meet the five tests on Proposal Page A?
  - Is there adequate opportunity for leadership?
  - Is it feasible? Are timelines realistic?
  - Are safety issues adequately addressed ?
  - Is the Scout ready to create the next level of detail ?
  - Does the Scout seem ready to be successful ?
- Did he meet with and work with the Project Beneficiary so they both understand their rights and responsibilities ?

Service Project Proposal Approvals

❑ In the last part of the Proposal, the Scout promises "on his honor as a Scout" that he has read the whole Workbook (thereby understanding the depth of the requirements) and that he will "do his best" in leading the completion of the project.

❑ After that, there is an Approval Section which consists of meaningful commitments and approval statements above the signatures of the Scoutmaster, Unit Committee, Beneficiary, and District Committee.

❑ The District signs last; the order of the other 3 can vary.

❑ Approval Signatures should be treated as almost legally binding, not as trivial sign-offs.

❑ No Project work, including permissions or fundraising, is allowed before the District has approved.

District-level Proposal Processing

District Leadership Role

District Review of Proposals

❑ **The Proposal will be reviewed** and comments sent to the Scout **prior to** formal District-level review.

❑ District-level review of the project is conducted in accord with Council and District procedures and schedules.

❑ Requests for additional detail are generally only for the purpose of fully understanding the scope of the project and whether expectations will be met regarding benefit, project planning and development, safety and LEADERSHIP.

❑ Suggestions will likely be made by the District at the formal district-level review based on the collective experiences of the members of the Review Team.

District Leadership Role

District Review of Proposals

❑ District will determine whether a Fundraising Application is needed.

❑ Project can only go forward after the proposal has been approved by the District.

❑ The Scout keeps the original Proposal signature page.
  - His Proposal will become part of his completed workbook.

❑ After District approval, all changes to the project must be discussed with the Beneficiary and the Unit. **Significant changes may require District review**. If in doubt, check with the District.

❑ A Council-level Eagle Scout Process document has been finalized by the Youth Development Committee and placed on the Council website: http://www.hudsonvalleyscouting.org/document/council-eagle-project-approval-bor-process.

Project Plan Creation

the Project Plan,
A Cover Page and Project Plan Pages A thru E

Troop Leadership Role

the Project Plan

❑ **Make sure the Scout understands that developing the Project Plan will take significant time.**

- Investing the time to put together a well-thought-out plan will:
  - Make the implementation go much more smoothly
  - Teach the Scout planning skills that he can use in school and for the rest of his life
- Planning is an evolutionary multi-step process
- Offer him the benefit of the adult experience of your troop's leadership in managing projects.

Troop Leadership Role

the Project Plan

❑ The Project Plan is a tool to help the Scout plan and develop his project. It expands on the basics that were included in the Proposal.

❑ The Workbook's Project Plan is a model for:

- ▪ Figuring out the work processes to be used
- ▪ Understand the number of people and skills they should have, task by task
- ▪ Creating the intended day-by-day schedule
- ▪ Having a shopping list for materials and supplies
- ▪ Making a check-off list for tools and safety items

❑ **Having a Project Coach is key to a successful Plan.**

Troop Leadership Role

the Project Plan

❑ Submission with the Project Report can help the Scoutmaster assess that the leadership aspect of Requirement 5 (i.e., to ".. give leadership to others . . . ") has been met, and support his approval of the completed project.

❑ Submission to the District Eagle Board of Review as part of the completed Project Workbook can help the Board also make that same assessment.

Troop Leadership Role

the Project Plan

❑ Reinforce with the Scout that National BSA has indicated by their Workbook design what they consider to be adequate planning.

❑ Start with the comments that were made during District Proposal approval, and by documenting any changes that have become necessary. Make sure re-approval is not needed: Ask if unsure!

❑ To help your Project Coach, your Leaders, and ultimately, your Board of Review members understand your Project Plan, create a description of what things look like, and what your obstacles may be, before you start.

❑ Be sure all project phases are well-thought out and documented.

❑ Create the list of jobs to be done – which is needed on Page D.

❑ Add any pictures or plans or other items listed as "Attachments"

❑ Create the lists of actual detailed estimates of Materials, Supplies, Tools, and other Needs

the Project Plan

❑ Expenses and Revenue Projections:

  ❖ On the *Expenses* side:

  ▪ A set of categories is used to establish a total project "value" – for both donated and purchased materials/supplies/tools/services

  ▪ Separate spreadsheet pages could be kept itemizing purchased items and donated items separately

  ▪ The value of significant donated professional services is good to know. The value for borrowed ordinary tools is not required.
  If you are able to borrow major equipment rather than renting it, go ahead – brag about how much was saved.

  ❖ On the *Revenue* side:

  ▪ Read the page called "Fundraising Application Page B" to understand the (definitions of the) types of Revenue that the Project Workbook uses.

the Project Plan

❑ Giving Leadership

- Scout Wisdom: Plan your Work, Work your Plan.

- Naming the steps to get done and the jobs to do is hard.

- It is like describing your body's skeleton – name those bones, because everything hangs off them.

- This is where you fit the parts (Materials, Supplies, Tools, and People) into the plan to make it all come together, and give yourself the knowledge of how you want things to be carried out. It makes "Be Prepared" realistic.

- This effort gets you ready to be out there directing the efforts of your workers and, yes, handling the job parts that may not be going as easily as you hoped.

Troop Leadership Role

the Project Plan

❑ Logistics, Safety, and Contingency Plans

- These sections cover important details.
- Review these ideas with
    - your Beneficiary, since it's their property and mission
    - your Troop leaders, since they worry about these things as part of being Scout Troop leaders
    - your Project Coach, as your key advisor

❑ Project Coach Comments

- Being told that "You have a good grasp of the Project's scope and seem ready" is a great reward: you earned it.
- Even if your Project Coach is hesitant, value his or her advice, and have them stay in touch as things go along.
- They do want you to succeed.

Troop Leadership Role

Funding and Fundraising

❑ Funding

- ▪ National BSA believes that fundraising should only be done when necessary. Projects should be low cost.

- ▪ Only raise enough funds to complete the project.

- ▪ Donations (funds and/or materials) from "the candidate, his parents or relatives, his unit or its chartered organization, parents or members of his unit, or the beneficiary" do not require approval (see detail in workbook).

- ▪ Donations (of funds and/or materials) from any others, such as businesses, require fundraising approval.

- ▪ Joint Eagle fundraising events, e.g. car washes, are OK.

- ▪ Crowdfunding is OK – see references at end of this presentation.

Troop Leadership Role

Funding and Fundraising

❑ A Fundraising Application is submitted by the Scout to Council, if equal to or over $500, after District Proposal approval.

Include a list of prospective donors

❑ Three signatures needed on Fundraising Application: Beneficiary, Unit Leader, Council. Approval may take up to two weeks.

• Include Council approval (usually an email) in the Report.

❑ Have Scout review and give "Aid to Navigating …" to Beneficiary

❑ Be sure that the Scout understands that fundraising is done in the beneficiary's name, not "Mike Scout's Eagle Project" nor the BSA nor his Troop.

❑ Benefiting organization "will provide receipts to donors as required." Scout should ask for the beneficiary's help in this.

• Checks for the Project can be accepted by the Unit.

Project Report

The Project Report Section:
A Cover Page & Project Report Pages A - C

Troop Leadership Role

the Project Report

❑ Scout has places to describe

 ▪ A description of the Project's impact

 ▪ A description of the completion of his Planning

 ▪ how project went: successes and challenges

 ▪ changes from Project Plan

 ▪ his experiences with leadership

❑ Service Project (time) Data

 ▪ Summaries by category of worker

Troop Leadership Role

the Project Report

- ❑ A funding discussion provides an overview of that element.
  - ▪ The Scout's money management is revealed
  - ▪ The appreciation of donor support is noted.

- ❑ The Workbook has spaces for a FEW key photos.
  - ▪ A separate photo album can be used to remember the rest.
  - ▪ Show your workers working – proof is good!

- ❑ **Signatures indicate satisfactory completion of project and that it meets Eagle Rank Requirement 5**.

Troop Leadership Role

Other Considerations

❑ **The Proposal and the Project Report reflect a Scout's attention to "quality".**

> He should be expected to make proper use of the English language. The Workbook has Spell Check and Grammar Checking features. Their assistance & suggestions should not have been ignored.

❑ **Note**: Guide to Advancement 2017 (Sect 8.0.3.2) describes the process to be followed if project approval signatures are withheld.

Things Leaders Should Know

Contact Information

❑ If you want more information about the Life to Eagle Trail, please contact your District Eagle Advancement Committee Chair or Eagle Scout Coordinator

❑ If you have any comments or questions concerning the content of this presentation, please contact:

- Peter Dowley (pdowley@juno.com), or
- Jim Duffy (JDuffy2465@aol.com), or
- Joe Geraci (jsgeraci@optonline.net)

❑ This presentation will be posted at www.ntown.info

Leader's Reference Materials

- *Guide To Advancement 2017* (GTA2017) (BSA #33088)
    - The main source of Advancement information
- HVC YDC "Eagle Scout Process" on HVC Advancement website
- *Guide to Safe Scouting* (BSA #34416)
- Advancement News
    - Subscribe; free e-newsletter; 6 issues per year
- Blog: Bryan on Scouting
    - Scouting magazine online: http://blog.scoutingmagazine.org/
- *Troop Committee Guidebook* (BSA #34505)
- *Eagle Scout Service Project Workbook October 2015* printing
    - Access using a link, not by BSA Pub number
    - Interactive .pdf
- *Eagle Scout Rank Application April 2016* version (BSA #512-728)
    - Interactive .pdf

Aim To Soar

With The Eagles

Hudson Valley Council