|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Event Name:** |  | **Author:** |  |  |
| **Date**: | YYYY-MM-DD | **Version**: |  |

EVENT CHARTER APPROVAL

*Event Charter approvals should include Executive decision maker(s), Event leadership (Sponsor, Event Manager) and key stakeholders (as appropriate).*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |
| **<Title>:** |  |  |  |  | YYYY-MM-DD |
|  | Name |  | Signature |  | Date |
|  |  |  |  |  |  |
| **<Title>:** |  |  |  |  | YYYY-MM-DD |
|  | Name |  | Signature |  | Date |
|  |  |  |  |  |  |
| **<Title>:** |  |  |  |  | YYYY-MM-DD |
|  | Name |  | Signature |  | Date |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

**Functional Area:**Scouting Experience

**Revision History Log**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Rev Date** | **Summary of Changes** | | **Author** |
| 1.0 | YYYY-MM-DD | | New document | John Smith |
|  |  | |  |  |
|  |  | |  |  |
|  |  | |  |  |

Part 1

*The Executive Summary is a high level snapshot of the Event – and will be used for the initial consideration of the event. This summary may be used throughout the Event and could be the only information seen by Decision Makers, so ensure the Event criteria is clearly stated.*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Event Description  *(Elevator Pitch)* | Write a three sentence description of the Event.  Start typing here | | | | | |
| Why this event? | How will the event contribute to a program that meets the needs and aspirations of today’s youth, ensures all four elements of the Canadian Path is our path to success (Youth-led, Plan-Do-Review, Adventure and SPICES) come to life is our fundamental focus.  Start typing here | | | | | |
| Has this event been held before? | Yes |  | | No | |  |
| Name of Event Manager | Start typing here | | Name of Event Sponsor | | Start typing here | |
| Planning and design start date | YYYY-MM-DD | | Event Date | | YYYY-MM-DD | |

|  |  |  |
| --- | --- | --- |
| **Educational Objective – SPICES** | **Measures of Success**  ***How*** *will success be measured?* | **Value Performance Metric (baseline / target)** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Event Benefits | Explain how the Event supports Scouts Canada’s Five Priorities | | | | | | |
| Membership Growth |  | | | | | | |
| Safety Leadership |  | | | | | | |
| Program Quality |  | | | | | | |
| Volunteer Support |  | | | | | | |
| Group Capacity |  | | | | | | |
| Critical Success Factors | Summarize the critical success factors that are required for the Event to be successful.  Start typing here | | | | | | |
| Alternatives | *Identify the alternatives that were considered to address the Event’s goals. These alternatives align with the alternatives evaluated within the Alternative Evaluation. Each evaluated alternative can be summarized with a short description.*   1. Start typing here | | | | | | |
| Recommendation | *Of the alternatives listed above, select the most suitable option, based on the evaluation detailed with the Alternative Evaluation.*  Start typing here | | | | | | |
| Scope | **In Scope** | | | ***Out of Scope*** | | | |
| What is included in the scope of the Event (i.e. the scope of what the Event will deliver)?  Start typing here | | | What is excluded from the Event?   Start typing here | | | |
| Assumptions, Constraints & Dependencies | Summarize the key assumptions, limitations and dependencies of the Event. Describe the restrictions that limit what can be achieved, how and when it will be achieved, and how much achieving it can cost.  For example:  Assumption: Scouts Canada will assign a dedicated Event Manager to the Event.  Constraints: The proposed location will only accommodate 1,000 campers.  Dependencies: The website needs to be maintained by the National Communications Team. | | | | | | |
| Assumptions | | Constraints | | | Dependencies | |
|  | |  | | |  | |
|  | |  | | |  | |
|  | |  | | |  | |
|  | |  | | |  | |
|  | | | |  | | |
| Key Stakeholders | The purpose of identifying stakeholders is to ensure expectations and needs are understood and to establish proper stakeholder communication. Indicate who or which areas of the organization will be impacted by the Event and which stakeholders are vital to the ensuring the Event’s success. This list of stakeholders is in addition to the Decision Makers already identified during the Opportunity Assessment.  Start typing here | | | | | | |
| Proposed Event Team | Name | | | | Event Role & Responsibility | | |
| <Name 1> | | | | <Role 1> | | |
| < Name 2> | | | | < Role 2> | | |
| < Name 3> | | | | < Role 3> | | |
|  | | | |  | | |
| High Level Milestones | Phase | Key Event Milestones | | | | | Dates (MMM-YY) |
| Identify and assess | <Milestone 1: brief description> | | | | |  |
|  | <Milestone 2: brief description> | | | | |  |
| Select |  | | | | |  |
| Design - plan |  | | | | |  |
| Execute - prepare |  | | | | |  |
| Deliver – the event |  | | | | |  |
| Learn |  | | | | |  |
| Communication Plan: | Outline your plan to keep stakeholders informed of Event progress. This should include method and frequency. Consider Event Status Reports and meetings.  Start typing here | | | | | | |
| Estimated Budget: | Indicate Event Budget, based on high level estimates. You may choose to split out different categories (e.g. Labor, IT, etc.). Estimate to the nearest $1000.  Start typing here | | | | | | |
| Additional Comments: | Start typing here | | | | | | |
| You have completed Part 1 | Congratulations- you have completed Part 1. Submit Part 1 to the Program Support Manager for review and conditional approval. This step will take up to 3 weeks and will likely require an in-person or conference call to clarify points in Part 1. | | | | | | |

Part 2

Rationale

|  |
| --- |
| How will the event: |
| Contribute to the development of young people? |
|  |
| Provide opportunities for young people to do things for the first time, making new friends, learning about new cultures, visiting new places and undertaking new adventures? |
|  |
| Celebrate Canadian Scouting and showcase what we are about? |
|  |
| Bring together a cross section of the Scouting world? |
|  |
| Include international guests? |
|  |

EVENT SCOPE (DECISION HIERARCHY)

In this section, clearly identify what is in scope vs. out of scope. Clear identification will provide the Event Team and Event Sponsor with an understanding of what the Event will deliver. Describe the end product(s) focusing on WHAT is being delivered to the client, not how. If you are defining a program, clearly describe the components of the program. Scope can be either in paragraph format or bullet points.

* 1. In Scope

Clearly identify the deliverable in scope items. Consider systems, people, process and knowledge in determining what will be included in the Event scope. This section should include Event justification of the business need and acceptance criteria that defines the end state of the Event.

The following items have been identified as in scope:

* Start typing here
  1. Out of Scope

Clearly identify what the Event will not deliver. Provide statements about what the Event will not accomplish or produce.

The following items have been identified as out of scope:

* Start typing here
  1. Assumptions, Constraints and Dependencies
     1. Assumptions

Identify any assumptions made in your opportunity assessment about how uncertain information as the Event has been conceived, planned and performed and assumptions. Describe the restrictions that limit what can be achieved, how and when it will be achieved, and how much achieving it can cost. Include assumptions referring to scope, budget, time, resources, external factors and environmental factors. Assumptions may need to be managed as risks.

The following assumptions have been made:

* Start typing here
  + 1. Constraints

Identify and summarize the details of the constraints on this Event. Include constraints for budget, time, resources, external factors and environmental factors. Itemize all the known restrictions or limitations placed on the Event.

The Event is constrained by the following factors:

* Start typing here
  + 1. Dependencies

Dependencies are factors upon which the Event is dependent for success. For example, is this Event relying on the success of another Event? If dependencies are noted, they need to be managed as risks.

The Event may be impacted by the following dependencies:

* Start typing here

RISK MANAGEMENT

Summarize the high level risks and proposed mitigations associated with this Event, considering systems, people, process and external/environmental factors. Discuss the inherent risk compared to the mitigated risk, essentially, what is the risk of “doing nothing”. Identify items which, if realized, influence the success of an alternative, value drivers or decision makers. Concentrate on those items that are outside of the jurisdiction of the Event and could be show-stoppers for the Event. It is valuable to consult the Sponsor and the Business / Function (e.g. department, operations or councils), when identifying risks. Include risks that are specifically related to the change caused by the Event solution. Risks related to the change may be identified in the Event charter and managed through the risk register or may be substantial enough to warrant management by a Change resource. If so, these risks may be managed separately.

* 1. Identified Risks

|  |  |
| --- | --- |
| Risk | Proposed Mitigation Strategy |
| <Risk 1> | <Mitigation 1> |
| <Risk 2> | <Mitigation 2> |
| <Risk 3> | <Mitigation 3> |

* 1. Ongoing Risk Management

In this section, it’s important to understand how risks will be managed and monitored throughout the Event. Clearly describe the process to monitor and control risk within your Event. For example, a simple strategy of maintaining a Risk Register and informing stakeholders of actualized risks may be sufficient.

Start typing here

EVENT STAKEHOLDERS

This section outlines who all your stakeholders are and why. Stakeholders are groups or individuals, internal or external, who are actively involved in the Event or whose interests may be positively or negatively affected by the performance or completion of the Event. The purpose of identifying stakeholders early in the process is to ensure expectations and needs are understood and to establish proper stakeholder communication. Many of them will be a source of requirements that you will solicit in the Plan & Design phase. Leaders will often have business requirements; however, there are also stakeholders in non-leadership functions who will be involved in the successful transition, maintenance and use of the Event alternative. Requirements from these stakeholders are often important to solicit as well.  
**Key stakeholders** are a subset of stakeholders who, if their support were to be withdrawn, would cause the Event to fail. The Event steering committee will typically have one or more key stakeholders. Be sure to keep your stakeholders informed throughout the Event, as appropriate.

During the Scope & Select Phase, a high level stakeholder impact analysis may be completed. This determines the impact of the Event on the stakeholders and their attitude towards the change. The impact analysis provides valuable information on the likelihood of adoption of the change and the communication/training approach. Depending on the scale of the Event, the Event Manager will decide the extent of the analysis.

|  |  |  |
| --- | --- | --- |
| **Stakeholder** | **Reason** | **Key** |
| *Individual or group*  Start typing here | *Explain why this individual or group is considered to be a stakeholder. Briefly outline their involvement or interest in the Event, including how they are impacted. As far as possible, identify the decision maker(s), who is doing the work, who is participating, who is contributing and who can influence the success of the event.*  Start typing here | Yes or No |
|  |  |  |
|  |  |  |

EVENT EXECUTION

* 1. Event Schedule
     1. Phases

In this section, indicate your target dates for Phase Completion. Scheduling your Decision (‘Gate’) meetings with the necessary parties should be done well in advance to ensure you are not waiting on availability to progress the Event and can be managed in your Action Log and/or Event Schedule.

|  |  |  |
| --- | --- | --- |
| Phase | Decision (‘Gate’) | Date of Gate |
| Identify & Assess |  |  |
| Select |  |  |
| Plan |  |  |
| Prepare |  |  |
| Operate |  |  |
| Close & Review |  |  |

* + 1. Milestones

In this section, list the major events that will measure the progress of the Event. The major milestones should coincide with the deliverables, but it is not necessary to identify a separate milestone for each deliverable.

|  |  |  |  |
| --- | --- | --- | --- |
| **Phase** | **Key Event Milestones** | **Start Date** | **Completion Date** |
|  | Itemize milestones with brief descriptions, using one line for each deliverable | Estimated start date (MMM-YY) | Estimated completion date (MMM-YY) |
| Identify & Assess | Milestone 1: |  |  |
|  | Milestone 2: |  |  |
| Select |  |  |  |
|  |  |  |  |
| Define |  |  |  |
|  |  |  |  |
| Execute |  |  |  |
|  |  |  |  |
| Operate |  |  |  |
|  |  |  |  |
| Sustain & Close |  |  |  |
|  |  |  |  |

* 1. Resource Requirements

This section is used to identify resources required on and in support of the Event Team. These resources could be from any area of the organization whether they have been committed yet or not.

|  |  |  |
| --- | --- | --- |
| **Core Event Team** | | |
| Name of Resource | Number | Estimated Dates (From – To) |
| Planning Committee |  | If known, (MMM-YY – MMM-YY) |
| Department managers |  |  |
| Team Leaders |  |  |
| Event volunteers |  |  |
| Staff Support |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| **Other Resources** | | |
| Name of Resource | Role on Event | Estimated Dates (From – To) |
|  |  | If known |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

* 1. Estimated Budget

In this section, include a high-level overview of the budget, to the nearest thousand dollars. In the comments section, explain how you estimated the amount. Complete the following table with budget estimates by phase, if required. Delete any items that do not apply.

|  |  |  |
| --- | --- | --- |
| Item | Cost ($1000) | Comments |
| **–Estimated Revenue - YYYY** | | |
| Participant fees |  |  |
| Activity fees (additional charge activities) |  |  |
| Sales |  |  |
| Donations |  |  |
| Business sponsorships |  |  |
| Other revenue |  |  |
| **Estimated Cost - YYYY** | | |
| Facilities |  |  |
| Program |  |  |
| Food Services |  |  |
| Volunteer recruitment, training, recognition |  |  |
| Communications, marketing, public relations |  |  |
| Health & Safety |  |  |
| Staff support |  |  |
| Technology (i.e. Wi-fi) |  |  |
| Administration |  |  |
| Transportation |  |  |
| No One Left Behind (2.5% of revenue) |  |  |
| Other |  |  |
| Contingency (5% of all expenses |  |  |
| Sub Total |  |  |
|  | | |
|  |  |  |
| Event Net Profit |  |  |

* 1. Monitoring and Controls

In this section, describe the governance plan for your Event. Focus on which controls you will be putting in place to ensure that the Event is meeting its expected deliverables. Consider how the progress will be tracked, reported on and communicated.

The suggested approach below may be customized as appropriate. In your strategy, consider the following:

* How and when will you compare the actual Event performance against the plan?
* How and when will you assess performance to determine if corrective actions need to be taken?
* How and when will you identify and report on new risks?
* How and when will you provide information to support status reporting?
* How and when will you report on forecasts to update costs and schedule?

Start typing here

EVENT COMMUNICATION AND REPORTING

Event Communications and Reporting will be discussed in greater detail in the Event Management Plan and/or Communication Plan. The Event Charter will provide a high level overview of how communication will be handled throughout the Event.

Consider your stakeholders and outline:

* How and when you will be keeping them informed?
* Who is responsible for the Event communications?
* What will be the frequency of meetings and reporting?
* What reporting will be created for the Event?

Summarize the communication and reporting strategy.

Start typing here

GLOSSARY

Start typing here