Checklist for Eagle Coaching (Version: 11.01.2023)

Scout Name:_____ **Unit #** _____

Telephone:_____ **Email:** _____

Project: _____

First Meeting - Scout Introduction

In setting up the meeting (either in person or virtual), ask the Scout to have note-taking materials. The Scout (or you) should also print out and have the following ready for review (all available at **EagleCoach.org**):

- Eagle Scout Service Project workbook
- Eagle Service Project – Getting Started Checklist
- Sample Project Log

The Scout should also download any Council materials from the Scout's Council website.

In you are meeting with a Scout to discuss the Eagle Scout Service Project, you must require a parent or Scout leader to be present. Current youth protection standards mandate a parent or Scout Leader. Parents must also be aware of the scope of the undertaking! It is best if the Scout is taking notes. Make the Scout feel comfortable and get to know him or her a little. We are looking for interests or activities that may help or hinder the young person with the process. This is part of being a coach.

Today, many of these meetings will be by Zoom or other teleconferencing. *Another adult is still required per youth protection requirements. This also includes email or text communications. All communication, in any form, requires participation of a Scout leader or parent.*

At least one in-person meeting is highly recommended. This is the best way to put a Scout at ease and get to know his or her strengths and weaknesses. If you suspect learning disabilities or other impediments to a Scout's progress, ask the Scout whether he or she receives help at school. Whatever help they may receive in school should be granted in completion of an Eagle Service Project.

I usually start the conversation by telling the Scout, "No one expects that you know how to do this. This is meant to be a learning experience." I usually see a Scout visibly relax upon hearing this!

Scouts vary in their capabilities! In the end, the Eagle Service Project is not about benches, fences, pathways or bat houses. It is the about a young person having the experience of leading others in the pursuit of a worthwhile goal. So, in a word, the objective is GROWTH, no matter where the Scout starts. The Scout should be challenged, but not overwhelmed, and as coaches, we always have to keep this in mind.

Once a Scout has indicated an interest in pursuing an Eagle Project, he should be registered with the District, which tracks all Eagle projects in progress.

Do a general intake:

☐ Name – Parents Names - Troop – Date of Birth   ☐ Merit badge status

☐ Interests, other activities, commitments, grade in school etc.

Project Introduction

☐ If available, show the Scout a copy of a completed **Eagle Application Workbook** from your troop as a way of showing him his or her final destination. Inform the Scout that he will be submitting a PAPER copy of his workbook with his or her Eagle application, allowing for the insertion of additional copy, exhibits, plans, photographs, etc.

☐ Review the **Project Workbook** – Discuss in very general terms the five sections of the Workbook:

- **Contact Information** - Needs to be filled out completely and a troop meeting is a good place to get it done.
- **Project Proposal** – A general outline of what you are proposing to do, with estimates of materials, costs and volunteers required. Requires four signatures for approval.
- **Project Plan** – Detail on the project down to the last bolt on how the project will be executed, including Work Processes, a detailed "recipe" on how to complete the project; a time-line; a complete list of items required with prices; and a list of jobs and who is going to do them.
- **Fundraising Application** – Submitted after Project Plan is complete. Requires 3 signatures for approval including District. Fundraising applications with Beneficiary and Scoutmaster signatures should be delivered, or scanned and emailed, to the appropriate District or Council representative.
- **Project Report and Exhibits** – A full accounting of what actually happened, with exhibits that demonstrate the Scout's leadership and results. Requires Scout signature and 2 approval signatures.

☐ Mention any Council preparation guides or instructions. These should be read by Scout and parents.

☐ Discuss the concept of a project log, and go through examples in the Sample Project Log. It's a good idea to show how the Scout must enter his or her own hours plus all those of the project volunteers in **Project Report**. Emphasize **ALL HOURS ARE COUNTED** – researching, writing, conversations, meetings, planning, fundraising, actual project, reports etc.   (Beneficiary representatives and store employees are not volunteers for the project and should NOT be included.)

☐ Discuss any ideas that the Scout may have for a project. Talk about potential sources as necessary. The Scouts school, past schools, house of worship, any not-profits with whom the Scout or family may be involved. Criteria for an acceptable Eagle Project:

- Safety – No highways, roofs, heavy machinery, etc.
- There must be a not-for-profit beneficiary (that is not involved with Scouting in any way.)
- Must be complex enough that it forces a Scout to recruit and lead others. **"The three things that you must demonstrate to your Eagle Board of Review are Leadership, Leadership and Leadership."** Our District's rough rule of thumb is that if a Scout and one adult can complete a project in a weekend, it is not complex enough.
- Cannot to be so complex that it will overwhelm the Scout. If it requires more than one or two fundraisers, it is probably too complicated.
- If there is any confusion as to an acceptable project, please contact the District Advancement Chair, who makes the final determination on the acceptability of proposed Eagle projects.

☐ Review the Project Proposal – A document that has enough information to make an intelligent decision on whether a project is feasible.   Cost estimates must be itemized, to show how the estimate was achieved, but all prices can be obtained online.

☐ **The Scout should have the Project Proposal reviewed by his or her District Representative before obtaining any signatures.** There is no sense in obtaining other signatures for a project that will not be approved by the District.

☐ Discuss timing – the average Eagle Scout Service Project takes 9-12 months to complete. If the Scout has less than a year to an 18th birthday, he or she must understand that every week counts. If the Scout has less than six months, it is best to work with a calendar and set milestones, working backwards from the planned delivery date of his Eagle Scout Rank Application.

☐ Action List: Have the Scout write down the next 5 or 6 steps that he or she can take after leaving the meeting. Examples: "Download the workbook PDF, and make sure that you can enter information; fill in as much contact information as possible at the next troop meeting; set up meetings with one or two possible beneficiaries."

☐ **Energizer Bunny** – Almost every Scout knows about the Energizer Bunny. The Scout must be an Energizer Bunny with his project – just keep going…and going… and going. This is not just a race for the fast and strong. It can be completed by **ANY** young person who is persistent and will just keep going. Emphasize this to the Scout – he or she WILL have problems. Perseverance is the trait that will eventually solve or work around those problems.

Project Proposal – Approval Criteria Used by District or Council

☐ The project is safe. All the rules in Guide to Safe Scouting can be observed.

☐ The project is for a not-for-profit organization, and is not being performed for any aspect of the Boy Scouts of America.   It is not primarily a fundraiser.

☐ The project will allow the Scout to demonstrate leadership by requiring the help of others. There must be opportunity for planning, development, and leadership.

☐ The project appears feasible. It is realistic for a Scout and his or her volunteers to achieve.

☐ The contact page is completely filled out, including BSA ID number and all Unit contacts.

☐ The project description is complete with "what, where, when and for whom."

☐ Materials, Supplies, Tools and Other is complete depending on the nature of the project. It is common for Scouts to be incomplete in this area. Food for volunteers, if necessary, should be included.

☐ The Preliminary Cost Estimate is backed up written research and itemized costs.

☐ Project phases should include: Preparation and approval of project proposal; completion of the project plan and a review by coach; submission of fundraising application and its approval; the fundraiser; general phases of the project itself, e.g. preparation, build, install, clean-up; preparation of the project report and exhibits; and thank you letters.

☐ Logical descriptions for all the other items. The last section (what the Scout proposes to do in the Project Plan) should include items like: "Complete lists of materials, supplies, tool and others with pricing"; "step-by-step description of how the project will all come together;" and "a list of jobs and who will do them."

☐ Signatures from the Candidate, Unit Leader, Unit Committee, and the Beneficiary.   Council or District approval will not be granted without these three other signatures.   District approval may only be granted by designated members of the District Advancement Committee.

Project Plan – Review by District - No signatures required, but should be reviewed by coach and District prior to fundraising.   The important concept is that this is a PLAN. Vague generalities in the proposal give way to specific actions and <u>dates</u>.

(I tell an Eagle Scout candidate, "The more we plan a complex event, the more likely it will succeed," and often use a camping or backpacking trip as an example.)

☐ Project Description and Benefit – Changes from the Proposal: Any substantial changes to the project should be noted, e.g. number of benches, length of pathway or fence, adding a new component to the project.

☐ Present Condition or Situation: A review of project or fundraising locations, noting issues or difficulties that need to be addressed.

☐ Project Phases: Now <u>every</u> phase must include a more detailed description and date, e.g. **"Fundraiser"** in the Project Proposal becomes, **"Car wash at the Moose Lodge on Saturday, April 28th (rain date April 29th) from 9 AM to 3 PM"** in the Project Plan.   All the phases in the Project Proposal should be included with the exception of the Project Proposal approval, which has already been done.

☐ Work Processes: This is a very detailed description of each step of the fundraiser and project, and should be compared to a recipe in a cook book. In other words, someone who is unfamiliar with the project could read the work processes and know exactly what to do. Each step should include **who, what, when, where and how**. The following is an example of a first step for a fundraiser:

"My dad and I will arrive at the Moose Lodge at 8:30 AM on Saturday, April 28th, before the other volunteers, to set up the car wash. We will run the hoses, set up a table and cash box, run a line for drying towels, and get the signs ready for use on the street. When my volunteers arrive at 9:00 AM, I will divide them into crews for the first shift: Signs, wetting cars, washing cars, washing wheels, rinsing, and drying. I will be in my Scout uniform and will be meeting customers and collecting contributions."

Notice in the above – **Who, what, when, where and how**.

☐ Permits and permissions: The question is answered. Beware of official permits that may take an extended period of time to get. For example: If a Scout is 6 months away from an 18th birthday, he or she should not be trying to get approval from State, County or other bureaucratic organizations.

☐ Materials, Supplies, Tools and Other: This should now be the final list of everything that is needed, where each item is to be obtained, and how much it will cost.   The Scout has already obtained available discounts. Nothing is in doubt. This is the Scout's buying plan, his or her shopping list, that names each item, where he will buy it, and how much it will cost.

☐ Expenses: Now down to the penny. The revenue box should have a 3-4 sentence description of what is being done raise the necessary funds.

☐ Giving Leadership: Every single job should be listed including driving, washing cars, loading lumber, planting flowers, digging, cutting etc.

☐ Logistics: How are people and materials being transported. Is a truck or trailer required?

☐ **Safety: Very important!** Are weather considerations, proper footwear, gloves, proper tool usage all taken into account? First aid kit and specialist on site at all times? The Scout must state that all activities will be in compliance with **The Guide to Safe Scouting**.

☐ Contingency Plans: This should be addressed, particularly if fundraising and/or project are outdoors.

☐ Comments from Your Project Coach: Scout should enter your comments to the proposal in this space.

☐ Copies of detailed drawings, plans, aerial photographs etc. should be appropriate to the project and inserted behind the Project Plan, e.g. Bench building requires scaled and detailed construction plans, landscaping requires a scaled site drawing showing the location of plants.

Fundraising Application – the fundraising application is located after the Project Plan in the workbook for a reason. It is only after a plan is relatively complete that the exact projected cost is known. The Project Plan should be complete before submitting a fundraising application.

☐ All contact information is complete.

☐ Describe how funds will be raised: A "who-what-when-where" description of the fundraiser. Dates must be specific.

☐ Other questions answered as necessary.

☐ Signature of Beneficiary and Unit Leader

☐ Completed fundraising applications with two signatures should be scanned and emailed to the District Advancement Chair (or in some cases, Council) for signature. Turn-around time varies, and can be up to two weeks.

Project Report – This is a debriefing of what actually happened. It would be most unusual for a project to exactly mirror the Project Plan. Life gets in the way!

☐ Each section is answered in reasonable detail.

☐ Entering Service Project Data: Hours entered here should correspond with hours that the Scout has kept in the project log. If not, the reason for the discrepancy needs to be determined.   The most current workbook now asks the Scout to provide a breakdown of planning and execution hours, in addition to the subtotals required by type of volunteer.

☐ Funding Summary: All monies must be accounted for. If excess funds were raised, they must be donated to the beneficiary in some way e.g. if a public school cannot accept funds, a donation to the booster club or PTA of that school would be acceptable. **Excess funds cannot be donated to the troop!**

☐ Three signatures are required: the candidate, the beneficiary and the Unit Leader.

☐ Exhibits to the Project Report should include:

- Project Log
- One or two pages of photos, in chronological order.
- Sign-in sheets, an "Assisted By" spreadsheet, or other evidence of volunteer participation.
- Evidence of thank you notes – Copies of three notes is suggested: one to a Scout showing his community service hours in the project, one to an adult and one to a donor or company providing a discount.
- Copies of all receipts and a copy of the check if left-over funds were donated to the beneficiary.

☐ If the Scout is ready to prepare an Eagle Application, he should download the following documents from EagleCoach.org:

- Eagle Scout Application
- Eagle Scout Application Checklist
- How to Prepare Eagle Scout Rank Recommendation Letters
- Council – Eagle Scout Recommendation Form