

Wood Badge 2017 Ticket Tracking

Participant Name: Al Lombardi

Patrol: Owl

Troop Guide Approval: Robert P. [Signature]
(please make any notes on back)

Senior Staff Approval: Ernst W. [Signature]
(please make any notes on back)

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Wood Badge Ticket Worksheet

A Personal Vision of Success

Name: Al Lombardi

S7-602-17 Patrol: Owl

My Scouting position: Cubmaster Pack 737

The team that will benefit from my leadership: Scouting in the Heart of Virginia Council and the boys of Pack 737.

Scouting's Values:

Scout Oath

*On my honor, I will do my best
To do my duty to God and my country and to obey the Scout Law;
To help other people at all times;
To keep myself physically strong, mentally awake, and morally straight.*

Scout Law

*A Scout is Trustworthy, Loyal, Helpful,
Friendly, Courteous, Kind,
Obedient, Cheerful, Thrifty,
Brave, Clean, and Reverent.*

Scouting's Mission Statement

*The mission of the Boy Scouts of America is to prepare young people to
make ethical and moral choices over their lifetimes by instilling in them
the values of the Scout Oath and Law.*

My vision of success and my plan of action relate to how the scouting program has influenced my life and in my belief that scouting has the ability to affect all boys' life; it has something to offer everyone.

Scouting is mission work, and the scouting program can change young men's lives forever. More importantly, it changes future generations. My mother was my den leader, I became an Eagle Scout, and now I am back involved with scouting as an adult leader. The program is powerful in its simplicity, living each day by the scout oath and the scout law answers the most difficult situations a young man faces in grade school, high school, college and in today's evolving and complex work environment. My vision as it relates to my ticket has two parts with six goals:

- I. To help develop a financially disciplined Pack, where leaders and adult Scouting parents have a clear vision into the sources and uses of the money that they contribute and raise and that we as a Pack spend.
- II. To empower the Heart of Virginia Council (HOVA) which represents my Pack, which is part of the Cardinal district; as well as the Capital, Crater, Rivers, Battlefield, Arrohattoc and Huguenot Trail districts; to help spread the mission work of scouting; reaching, recruiting, and retaining boys can benefit from the scouting program.

I plan to accomplish this through the following goal items:

1. Present to Committee information on Establishing proper segregation of duties related to the collection and disbursement of operating cash for the pack to ensure protection of the Pack's assets.
2. Creating clear visibility into the Pack's budgeting process, independent review, and approval of the budget at the Committee level; with accountable leaders for all significant budgeted line items, and monthly monitoring of the budget at the committee meetings. I will present these budgeting policies and procedures to the Committee and lead the discussion on updating Pack budgeting policies.
3. Providing proper oversight of all popcorn fund raising, segregation of duties related to the purchasing and payment of popcorn, an independent review of all popcorn purchases, monitoring activities around all show and sales, and a final independent reconciliation of popcorn purchases, popcorn sales and popcorn deposits. I will discuss these proposed changes to the Pack's popcorn fund raising process with the Committee and lead the discussion on enhancing our popcorn fund raising process.
4. Creating a uniform closet and providing all scouts that have financial needs the ability to have a uniform shirt.
5. Allowing every scout the opportunity to participate in scouting day camp. At the beginning of each year, our Pack will meet with all parents that express financial concerns regarding their ability to attend cub scout day camp, and develop a plan to allow deserving scouts that are in need to attend day camp.
6. Helping to raise money at the Heart of Virginia Council level, which includes Pack 737, so that the Council is able to use its expertise and grow the scouting program throughout Central Virginia, indirectly benefitting Pack 737.

Wood Badge Ticket Goal Sheet Goal #1

Name: Al Lombardi

S7-602-17 Patrol: Owl

My Scouting position: Cubmaster Pack 737

The team that will benefit from my leadership: Pack 737, creating a financially disciplined Pack, with controls in place to ensure that the Committee is aware of the money the Pack has, and that the Pack is able to ensure its long-term financial viability.

SMART goal: Present to Committee information on Establishing proper segregation of duties related to the collection and disbursement of operating cash for the pack to ensure protection of the Pack's assets. Establishing proper segregation of duties related to the collection and disbursement of operating cash for the pack to ensure protection of the Pack's assets.

Who: Adult leaders, Committee members and parents of the Pack.

What: Our Pack must increase its financial discipline. Currently, we task our Treasurer with depositing and issuing all disbursements, reconciling the Pack's bank account and creating the Pack's budget.

Where: Vet the process through discussions at the committee meetings and have monthly meetings where we look at a reconciliation of the Packs checking account, ensuring we understand all reconciling items. At a minimum, the discussion needs to be occurring with at least the Cubmaster and/or the Committee Chair.

When: Monthly, at the Committee meeting.

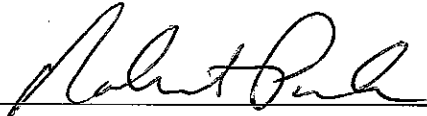
Why: To ensure a financially viable Pack.

How: Going forward we will establish proper segregation of duties related to the

collection and disbursement of cash.

1. The treasurer will be responsible for issuing and disbursing checks.
2. An independent committee member will perform the bank reconciliation.
3. At the committee meetings, the bank reconciliation will be reviewed, ensuring the Committee understands all reconciling items and our financial position. At a minimum, the Treasurer and either the Cubmaster and/or the Committee Chair should be involved.

How you will determine the task is complete: I will present this financial goal to the Committee and then the Pack can then act on them if they chose. These goals are a best practice that either will be adopted by the pack, or will shed light on the matter.

Troop Guide goal approval:  Date: 10/24/17

Wood Badge Ticket Goal Sheet Goal #2

Name: Al Lombardi

S7-602-17 Patrol: Owl

My Scouting position: Cubmaster Pack 737

The team that will benefit from my leadership: Pack 737, creating a financially disciplined Pack, with controls in place to ensure that the Committee is aware of the money the Pack has, the intended use of the funds and that the Pack is able to remain its long-term financial viability. The budget is currently a “roll-forward” of last year’s budget. We will use historical costs, based on a per scout basis, develop assumptions based off of our annual planning meeting, and develop a robust budgeting model, which will be independently reviewed. In addition, for each significant line item (e.g. revenue – popcorn sales, disbursements – Fall Campout, Pinewood Derby Race, Spring Campout, Advancements) a parent volunteer will be responsible for the planning and tracking of those revenues/disbursements and proactively discussing any pros and cons to the budget with the committee. The budget will be monitored through review and discussion at each committee meeting.

SMART goal: Creating clear visibility into the Pack’s budgeting process, independent review, and approval of the budget at the Committee level; with accountable leaders for all significant budgeted line items, and monthly monitoring of the budget at the committee meetings. I will present these budgeting policies and procedures to the Committee and lead the discussion on updating Pack budgeting policies.

Who: Adult leaders, Committee members and parents of the Pack.

What: Improving the Pack’s budget process, and spreading the accountability of the

budgeting process to more stakeholders in the Pack.

Where: Monitoring of the budget will occur through review and discussion at each committee meeting. At a minimum, the discussion needs to be occurring with Cubmaster and the Committee Chair.

When: Monthly at the Committee meeting.

Why: To ensure a financially viable Pack.

How: Through the Pack's monthly committee meetings, the budget will be monitored through review and discussion at each committee meeting. At a minimum, the discussions need to be occurring with Cubmaster and the Committee Chair.

How you will determine the task is complete: I will present this financial goal to the Committee and then the Pack can then act on them if they chose. These goals are a best practice that either will be adopted by the pack, or will shed light on the matter.

Troop Guide goal approval: Robert Paul Date: 10/18/17

Wood Badge Ticket Goal Sheet Goal #3

Name: Al Lombardi

S7-602-17 Patrol: Owl

My Scouting position: Cubmaster Pack 737

The team that will benefit from my leadership: Our Pack. Our current Popcorn Kernel does an exceptional job. However, in the past this has been a drain on cash flows due to improper ordering patterns, lack of a secondary review on inventory purchases, and a lack of monitoring at show and sells. The Pack will require that scouts collect checks and cash upfront on all individual sales and that orders placed by the Popcorn Kernel on behalf of the popcorn by the individual scouts have had at least one individual review performed prior to the placement of the order. For all show and sells that the Pack participates in, ensure that the amount of inventory that is purchased is consistent with prior historical show and sells, and that the mix of inventory purchased is low cost, easy to sell SKUs (e.g. *unbelievable butter* and *butter light*). This will help to prevent the Pack from having high inventory that it has capital tied up in and is unable to move. Finally, a lot of the show and sells yield cash donations. To prevent the skimming of these cash donations, a second parent should always be required to be at the show and sell. If a second adult is unable, to be present, then cash collections should be reviewed for reasonableness and any large discrepancies questioned/investigated. The final amount of inventory the Pack has ordered should be reconciled to the orders placed, and any large differences investigated.

SMART goal: Providing proper oversight of all popcorn fund raising, segregation of duties related to the purchasing and payment of popcorn, an independent review of all popcorn purchases, monitoring activities around all show and sales, and a final

independent reconciliation of popcorn purchases, popcorn sales and popcorn deposits.

I will discuss these proposed changes to the Pack's popcorn fund raising process with the Committee and lead the discussion on enhancing our popcorn fund raising process.

Who: These controls around the ordering of inventory will occur prior to placing the packs order with Heart of Virginia Council. The monitoring of show and sells will occur as needed. The independent review of the popcorn orders and the reconciliation between the popcorn purchases, sales and deposits should be done by at least the Cubmaster and or the Committee Chair.

What: Controls around the Popcorn process

Where: To be discussed at the Committee meeting.

When: Prior to ordering popcorn inventory, and at the end of the popcorn fundraising season.

Why: To ensure a financially viable Pack.

How: Through the Pack's monthly committee meetings, the popcorn process will be monitored through review and discussion at each committee meeting. At a minimum, the discussion needs to be occurring with Cubmaster and the Committee Chair.

How you will determine the task is complete: I will present this financial goal to the Committee and then the Pack can then act on them if they chose. These goals are a best practice that either will be adopted by the pack, or will shed light on the matter.

Troop Guide goal approval: _____ Date: _____

Wood Badge Ticket Goal Sheet Goal #4

Name: Al Lombardi

S7-602-17 Patrol: Owl

My Scouting position: Cubmaster Pack 737

The team that will benefit from my leadership: Pack 737. Every scout should have the opportunity to participate in scouting, and unfortunately, too often the cost of a uniform is a deterrent. Our Pack will establish a uniform closet to be stocked with volunteer donations and funded by the Pack through its operating budget.

SMART goal: Creating a uniform closet and providing all scouts that have financial needs the ability to have a uniform shirt.

Who: All boys of the Pack that are in financial need.

What: Provide all scouts in the Pack with the ability to have a scout shirt.

Where: The amount of money will be allocated from the budget, and presented to the committee.

When: At the monthly Committee meeting

Why: To provide financial assistance to those who might need help.

How: Through decision to fund for uniforms will occur at the Pack's monthly committee meetings. The uniform closet will be housed at the locked spaced the Pack is given over the gym of our charter organization.

How you will determine the task is complete: I will present this financial goal to the Committee and then the Pack can then act on them if they chose. These goals are a best practice that either will be adopted by the pack, or will shed light on the matter.

Troop Guide goal approval:



Date:

10/14/17

Wood Badge Ticket Goal Sheet Goal #5

Name: Al Lombardi

S7-602-17 Patrol: Owl

My Scouting position: Cubmaster Pack 737

The team that will benefit from my leadership: Pack 737.

Every scout should have the opportunity to participate in scouting day camp. At the beginning of each year, our Pack will meet with all parents that express a financial concern for their son to be able to attend day camp. Our Pack will cover the costs of all boys that have a financial need based on the boy attending 75% of all Pack/den related events, and a parent/guardian leading a leadership event as defined in the budget. The Cubmaster and the Committee Chairman determine final approval of the scholarship.

SMART goal: Allowing every scout the opportunity to participate in scouting day camp. At the beginning of each year, our Pack will meet with all parents that express financial concerns regarding their ability to attend cub scout day camp, and develop a plan to allow deserving scouts that are in need to attend day camp.

Who: All boys of the Pack that are in financial need.

What: Provide all scouts in the Pack with the ability to have a scout shirt.

Where: The amount of money will be allocated from the budget, and presented to the committee.

When: Monthly at the Committee meeting

Why: To provide financial assistance to those who might need help.

How: Through the Pack's monthly committee meetings, discussions with den leaders,

and the budgeting process.

How you will determine the task is complete: I will present this financial goal to the Committee and then the Pack can then act on them if they chose. These goals are a best practice that either will be adopted by the pack, or will shed light on the matter.

Troop Guide goal approval: *Nalut Pal* Date: *10/14/17*

Wood Badge Ticket Goal Sheet Goal #6

Name: Al Lombardi

S7-602-17 Patrol: Owl

My Scouting position: Cubmaster Pack 737

The team that will benefit from my leadership: All boys, not just those that are part Pack 737, should have the opportunity to participate in scouting. The best way to ensure that our council is strong is to ensure that it has the resources that it needs, primarily the appropriate amount of funding. Friends of Scouting have the primary responsibility for raising capital; however, every pack can help. In addition to the dues that our Pack collects each year to cover our operating expenses, there are several additional opportunities to contribute to the Heart of Virginia Council, which our pack is a member. The Heart of Virginia Council is a 501(c) (3) entity, which allows corporations and individuals to receive a tax deduction for the contribution. The contributions to the Heart of Virginia Council will help our district (Cardinal district) as well as the Capital, Crater, Rivers, Battlefield, Arrohattoc and Huguenot Trail district through a 501(c) (3) donation.

Theses donations to the pack can include:

1. Companies in the Richmond area that will make matching dollar contributions to 501(c) (3) companies that their employees sponsors (e.g. for every \$ contributed the company will match that contribution up to an annual limitation, up to annual max).
2. There are Companies in the Richmond area that will make matching dollar contributions to 501(c)(3) companies that their employees sponsors (e.g. for every specific number or hours worked, a company will contributed the company

will match that contribution up to an annual limitation, up to annual max)

SMART goal: Helping to raise money at the Heart of Virginia Council level, which includes Pack 737, so that the Council is able to use its expertise and grow the scouting program throughout Central Virginia, indirectly benefitting Pack 737 and other units in the Cardinal district.

Who: Adult members of the Pack and their employers.

What: Request adults to look into their individual human resource policies to see if their employer will make matching contributions to the Heart of Virginia Council to advance the scouting program throughout central Virginia, make dollar contributions to the pack for hours of volunteer service, and encourage the parents to donate to Pack as part of their tax planning strategy while also giving to a program that will help others in need and do service related projects to better the Richmond area. I will reach out to the Cardinal District FOS Chair to discuss helping with other unit presentations focusing on employer matching contribution program for scouting.

Where: Vet the process through discussions at the committee meetings and communicate to process to the Pack via email, at meetings, and on one-to-one conversations.

When: By December of every year (as the new tax year ends)

Why: To ensure a financially viable council that can help all scouts, and increase the awareness of the scouting program in the area that my pack lives does.

How: Through discussions at the committee meetings and communicate to process to the Pack via email, at meetings, and on one-to-one conversations.

How you will determine the task is complete: I will present this financial goal to the Committee and then the Pack can then act on them if they chose. These goals are a best practice that either will be adopted by the pack, or will shed light on the matter.

Troop Guide goal approval: *Althra* Date: 10/14/17