

Event Planning Timeline and Checklist




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EVENT PLANNING TIMELINE & CHECKLIST

BETWEEN 4-6 MONTHS OR MORE BEFORE EVENT:

PLANNING:

Deciding on the purpose and goal(s) of your event is essential if you are to be successful. If you are unclear about your event, the flyers and information you send out about the event will also be unclear; this can cause confusion on the part of your staff and participants. Here are some questions to consider when determining the purpose and goals.

What type of event is this?

- ☐ Is the event for girls or adults?
- ☐ If it is for girls, how will girl participation and responsibility be incorporated in the planning and execution of the event?
- ☐ What age group of girls are you targeting?
- ☐ Is the program suitable to the age group and experience?
- ☐ Is the event to serve current membership, recruit new members, or both?
- ☐ How many participants (girls and adults) can you accommodate? How many are you expecting?
- ☐ How will this event meet the needs of the girls and the community?
- ☐ Will the event provide opportunities for girl input and give girls a chance to plan or lead activities?
- ☐ What kind of opportunities for personal growth will there be for girls and adults?

Will the event be inclusive of all members?

- ☐ Is it scheduled on a religious or cultural holiday?
- ☐ Is it inexpensive enough to be affordable?
- ☐ Are the activities adaptable for those with special needs?
- ☐ Are the activities/food choices culturally sensitive?
- ☐ Will girls be involved with people from diverse backgrounds?

Be Inclusive!

Not all girls live with their mother and/or father. Be sure to name your event in a way that girls will feel free to bring another caring adult:
VIP and Me or Me and My Guy

Also, be sure to consider specific religious observances, foods, or certain activities that may exclude some girls. Choose a theme that can offer variety and options.



Will your event support the Girl Scout Learning Experience?

- ☐ Will the event be fun?
- ☐ Which values in the Promise and Law will girls learn more about?
- ☐ How will one or more of the Girl Scout Leadership Experience Processes be integrated:

GIRL LED—Girls learn how to be leaders by leading themselves in age appropriate ways.

LEARNING BY DOING—Girls learn new things through hands-on activities.

COOPERATIVE LEARNING—Girls work together toward a common goal.

- ☐ Will the girls **DISCOVER?** (values, skills and confidence to do what's right)
- ☐ Will the girls **CONNECT?** (with the community as they learn how to work with other people)
- ☐ Will the girls **TAKE ACTION?** (to change the world for the better)
- ☐ Which of the **5 Benefits** will the girls gain from this event?
 - * **Strong Sense of Self**—confidence in themselves and their abilities
 - * **Positive Values**—act ethically, honestly, responsible, and show concern for others
 - * **Challenge Seeking**—take appropriate risks, try things even if they might fail and learn from mistakes
 - * **Healthy Relationship**—develop and maintain a healthy relationship by communicating their feelings and resolving conflicts constructively
 - * **Community Problem Solving**—learn how to identify problems and create action plans to solve them.

Are there specific Journey awards, badges, or other program resources related to the event?

- ☐ If so, what program links do you want to emphasize?
- ☐ Is your program already emphasizing these links?



EVENT PLANNING TIMELINE & CHECKLIST

INITIAL PLANNING:

- ☐ Gather service unit input to develop concept for event
- ☐ Gather girl input to develop theme, title, and activities
- ☐ Determine which members you need for your committee
- ☐ Enlist girl and adult volunteers for event committee and hold meeting
- ☐ Select a date. Consider service unit, council, and school calendars
- ☐ Be inclusive! Consider religious holidays (be careful—observances for some holidays begin the evening before)
- ☐ Include event on service unit calendar



EVENT FINANCIAL FORM (BUDGETING):

- ☐ Use budget worksheet to start the budgeting process
- ☐ Determine estimated total event cost
- ☐ Determine fee per person (develop payment schedule if necessary)
- ☐ Submit Event Financial Report to service unit for approval before any money is collected or spent and before the event is publicized in any way
- ☐ Determine who will be the event treasurer
- ☐ Work with service unit to determine how, when, and by whom expenses and deposits will be paid
- ☐ Determine needed forms: Money Earning, Donations, Sponsorship, etc.
- ☐ Review guidelines in *Volunteer Essentials* concerning money-earning
- ☐ Consider affordability of event for the girls in the area being served
- ☐ Determine amount to be set aside for financial assistance for girls who may not be able to afford the event

EVENT NOTIFICATION & APPROVAL FORM:

- ☐ Obtain approval from Leader Support Manager or Program Support Manager in your service unit for event as soon as possible and before sending any publicity or flyers out about the event



SELECT A SITE:

Use the following criteria to identify appropriate site:

Review *Volunteer Essentials* for council properties that are available.

- ☐ The area is large enough, suitable, and safe for planned activities. Adequate outdoor and indoor space. Maximum occupancy established by fire department or owner are carried through.
- ☐ The facility has adequate insurance and a Certificate of Insurance listing Girl Scouts of Northern California as additional insured
- ☐ Site is accessible to individuals with disabilities
- ☐ Adequate parking. Safe place for drop off/pick up
- ☐ If indoors, accessible and well-marked exits. If multiple story building, there are at least two exits separate from each other. Exits are by stairs, not ladders, with well-secured handrails
- ☐ Sanitary toilets and hand washing facilities:

Overnight Sites	1 for every 20 persons
Day Camp	1 for every 30 persons
All day events	1 for every 100 persons
Large overnight events	1 for every 50 persons
- ☐ If beds are provided, must be no more than two high
- ☐ Safe water supply (or bring in adequate water)
- ☐ Electricity needs are met. Equipment at the facility is up-to-date and in good working order
- ☐ Efficient garbage disposal, sewage, wastewater systems
- ☐ Telephone available for your use (cell service is not always available)
- ☐ Fire extinguishers are located throughout the facilities
- ☐ Emergency evacuation plans are posted
- ☐ Adequate smoke and carbon monoxide detectors and sprinklers are in place according to local fire codes
- ☐ Local law enforcement and fire protection agencies are known and notified for remote sites
- ☐ Areas for campfires are well cleared and have fire fighting equipment nearby (a permit may be required—check with park ranger)
- ☐ Kitchens, dining facilities, and food service areas comply with all applicable building and health codes. Site can provide for proper storage and preparations of food to prevent illness. If using a commercial kitchen, it is required that at least one adult have a current Serve Safe certificate.
- ☐ Site provides adequate protection from weather
- ☐ Site allows for adequate security precautions to be taken
- ☐ Send deposit for site, obtain permit or contract
- ☐ Obtain required council staff signatures on any contracts as outlined in *Volunteer Essentials*
- ☐ Determine whether the site or any vendors will require a Certificate of Insurance. If so, use Certificate of Insurance Request form.

EVENT PLANNING TIMELINE & CHECKLIST

PERMISSION & HEALTH HISTORY FORMS

Troop/group leaders must understand that they must have a signed permission form for every girl to participate in any event.

- ☐ Determine whether the Annual Permission Form may be used (if the activity does not exceed 6 hours, the destination is located within 60 miles of the regular meeting place, and the activity is not considered high adventure) Otherwise regular permission form must be used.
- ☐ Determine whether troop/group leaders will collect and bring girl permission forms (group registration events) or whether you must collect them from individual girls.
- ☐ Determine whether troop/group leaders will bring girl Health History forms (group registration events) or whether you must collect them from individual girls and keep them with the First Aider.
- ☐ For activities/events lasting 3 days or more include a health screening upon arrival. Look for signs of illness, cough, fever, flushed skin and screen for head lice.
- ☐ If your activity or event is overnight, Adult Health History Forms are required.

CONTRACTS:

- ☐ All contracts, agreements, memorandums of understanding, and facility use permits must be approved and signed by an authorized council staff member. Don't wait to the last minute, as contracts may take 5-8 business days to review and sign. *Volunteer Essentials* has information as to where to send the contract.

INSURANCE:

- ☐ Additional insurance must be obtained if unregistered people (adults or children) will be present at your event. Additional insurance is also needed if the event will last 3 nights or more. This insurance is extremely inexpensive and easy to obtain. For more information consult *Volunteer Essentials* or the council website.
All requests must be received 2 weeks/10 working days prior to the first day of your event.
- ☐ Vendors and facilities should have a Certificate of Insurance on file with GSNorCal that shows \$1,000,000 in liability insurance and listing GSNorCal as an additional insured. Allow at least 2 weeks.
- ☐ Vendors or facilities may require that Girl Scouts of Northern California provide a Certificate of Insurance. Allow at least 2 weeks.
- ☐ For questions or more information about any insurance matters, contact the insurance specialist at insurance@girlscoutsnorcal.org.



TRANSPORTATION & OTHER CONCERNS:

- ☐ When renting or chartering a bus is necessary, permission must be obtained from the council Risk Management Department at least 4 weeks before the event.
- ☐ Certain insurance minimums must be met and contracts signed by council staff. Consult *Volunteer Essentials* for additional information.
- ☐ Vans carrying up to 10 people are permissible. Vans carrying up to 12 people may be used with special approval (if all drivers have current Class B licenses) from the council. 15 passenger vans are not approved to transport Girl Scouts in our council.
- ☐ Current laws regarding car safety seats for children must be followed.
- ☐ Drivers must be an approved adult volunteer at least 21 years old, a good driving record and have a valid license.



TRIP OR HIGH-ADVENTURE APPROVAL FORM

- ☐ If you will be doing any high adventure activities OR your event is 3 nights or longer, you must submit a Trip or High Adventure Approval Form to the council (just one form for the whole event—troops/groups do NOT need to turn them in).

BETWEEN 2—4 MONTHS BEFORE THE EVENT

BEGIN ESTABLISHING THE EVENT SCHEDULE:

- ☐ Determine who will arrive before the participants in order to set-up, communicate with site liaison and fire/police, post signs, set-up registration table, escort event staff to their positions, and resolve last-minute situations
- ☐ Determine when registration or check-in should begin
- ☐ Include a time for brief announcements (location of first aider, lost and found, emergency procedures)
- ☐ Determine who is responsible to assist with certain duties, such as clean up during and after event.
- ☐ Schedule time for snacks or meals as appropriate.
- ☐ For longer events, schedule breaks for the adults.
- ☐ Consider establishing kapers for girls, adults, or groups to help out with certain duties.
- ☐ Develop inclement weather plans.



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PUBLICITY:

- ☐ Design publicity plans
- ☐ Establish registration procedures, cancellation policy
- ☐ Create flyers, registration and confirmation materials
- ☐ Obtain approval from service unit before distribution
- ☐ Distribute promotion material
- ☐ Begin accepting registrations and send confirmation

SAFETY PLANNING:

- ☐ Event Manager needs to complete Safety Wise training
- ☐ Determine adult/girl ratio for this event.
- ☐ Recruit Girl Scout First Aider
- ☐ Consult Safety Activity Checkpoints for activities.
- ☐ Review Volunteer Management Policies in *Volunteer Essentials*

SITE SECURITY:

- ☐ Consult Girl Scout Safety Guidelines in *Volunteer Essentials*
- ☐ Tour entire site and note hazards traffic, accessible cleaning supplies or other chemicals, areas accessible by the public, exposed tree roots, marshy areas, cliffs, poison oak, areas where girls would be out of sight, etc.
- ☐ Establish boundaries and off-limits areas for participants
- ☐ Establish procedures for girl supervision.
- ☐ Establish the buddy system for girls (and adults?).
- ☐ Establish rules for girls to notify adults when they will use the bathroom or go to a different area.
- ☐ Establish safe areas to store valuables.
- ☐ Establish an evacuation plan.
- ☐ For activities/events lasting more than one day requires a fire drill within the first 24 hours of the event.
- ☐ Communicate GSNorCal alcohol (may not have) and smoking (smoke in designated area and out of sight of girls) policy to all adults. Volunteer Management Policies in *Volunteer Essentials*
- ☐ Establish procedures for girls to check in and out of the event, girls who leave early, etc. No participant should leave early without written permission from their custodial parent or guardian. Such requests must be submitted immediately upon arrival.

CERTIFICATIONS & LOCAL ORDINANCES

- ☐ Determine the level of first aid required whether a First Aider or Wilderness First Aider
- ☐ Determine if any other adults with special certifications or trainings are required. Require written evidence of competence or documented training and experience. For example, it may be necessary to have a person who holds a Food Handlers' License (ServSafe) in order to serve food at your event, or you may need a lifeguard.

INFORMATION ABOUT HIGH ADVENTURE ACTIVITIES

The activities below are specified by GSNorCal as high adventure activities in *Volunteer Essentials*, (which is not intended as an exhaustive list) and are all included because they fit into one or both of the following categories:

- the activity involves a reasonable expectation of physical risk to the girls,
- the activity involves legal risk to the adult volunteers and/or the council. These include situations where rider or other additional insurance may be required, vendor or facility contracts may need to be signed, adult must be certified in a specific skill, or specific critical guidelines must be followed to ensure the safety of the girls.

Land Sports: archery, backpacking, bicycling with vendor supplied bicycles, bounce houses, camping, caving, challenge/ropes courses, climbing walls, fencing, gymnastics, horseback riding, ice skating, indoor skydiving, indoor trampolining, in-line or roller skating, marksmanship, rock climbing, Segway, skateboarding at a skateboard park, skiing, sledding, snowboarding, snowshoeing, snow tubing, tobogganing, vaulting on horseback, or when girls ages 12 and older will operate motorized vehicles.

Water Activities: boating, canoeing, kayaking, rafting, sailing, scuba, snorkeling, surfing, swimming, tubing, water skiing or wakeboarding, windsurfing, any type of trips on waterways that are highly changeable or uncontrollable or when girls ages 12 and older will operate motorized watercraft.

If the girls will be participating in high adventure activities like the above, a Trip or High Adventure Approval Form must be filed with the council Risk Management Department travel@girlscoutsnorcal.org. Note that only one form for the event should be filed (each participating troop/group should NOT file this form).

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COMMUNICATION:

- ☐ Determine location of the telephone.
- ☐ Know location and transportation route to get to nearest hospital.
- ☐ Compile a list of local emergency telephone numbers: ambulance, hospital, poison control center, police, fire, building maintenance, etc. Distribute and post information—especially near telephones.
- ☐ Establish an emergency contact person who is not at the event. List this person's contact information on the registration form. The person should have a list of all participants and their emergency contacts.
- ☐ If your site is large, how will event staff communicate with each other? Cell phones? Walkie-talkies?
- ☐ Contact fire and police prior to event if event will be in a remote area or there are special parking, traffic, or safety concerns.

EMERGENCY PLAN:

- ☐ Design a plan for managing emergency situations, including consideration of:
 - Natural hazards (lake, cliffs, etc.),
 - Natural disasters (storms, floods, fire, etc.),
 - Injuries or medical emergencies,
 - Lost children,
 - Intruders—establish procedures for politely asking non-participants to leave the area.
- ☐ Communicate with event staff and other adults on how to respond in an emergency prior to event.
- ☐ Establish and communicate emergency evacuation plan with all participants (where will they go?)—let them know who is in charge in these situations prior to event. Should cars back into parking spots?
- ☐ Establish emergency communication system on site.
- ☐ Establish security plan, adult supervision placement.
- ☐ Review Girl Scouts of Northern California Emergency Management Plan in *Volunteer Essentials* (electronic copies of the emergency card can be downloaded from the council website).
- ☐ First Aider downloads GSNorCal Health & Safety Plan for Activities and Events .
- ☐ Review Service Unit Emergency Plan, if there is one.
- ☐ How will parents be communicated with in the event of an emergency?

HEADQUARTERS EMERGENCY RECORDS:

- ☐ A roster of all girl and adult participants in attendance should be maintained. If girls will participate with their

Communicate your emergency plans with all adult and girl participants—plans do no good if nobody knows them!

troops/groups, the group may turn in an individual roster prior to the event or at check-in.

- ☐ Troop/group leaders are generally responsible for permission forms, Health History forms, and photo release forms for all girls attending with their troop/group, but sometimes depending on the site layout or types of activities planned, the registrar should hold these documents (First Aider holds Health History forms).
- ☐ Girls must have a health examination within the preceding 24 months for participation in resident camps, or an event lasting more than 3 nights.
- ☐ Health History forms for adults are required for overnight events or when they will participate in physically demanding activities.
- ☐ Adults must have a health examination if they will participate in extended trips.
- ☐ Site and vendor Certificates of Insurance.
- ☐ Site rental contract or permit (don't forget to arrange for a council staff member to sign all contracts and permits).
- ☐ Activity Accident Insurance Basic Coverage pamphlet.
- ☐ Mutual of Omaha Insurance Claim Form—completed and turned in with the Accident/Injury Report Form.
- ☐ Accident/Injury Report Forms (use for any accident or illness that requires or potentially may require medical attention). Must be submitted within 24 hours of occurrence to Risk Management Department, Insurance Specialist at the Alameda office.
- ☐ Incident Form (use to report any non-injury incident of serious verbal abuse, physical altercation or an unusual and/or serious behavioral situation).
- ☐ GSNorCal Emergency Cards should be distributed to all event staff and a reminder sent to troop/group leaders to distribute to all adults present.
- ☐ Media Information Sheet (process of how to assist the media to connect with a council spokesperson)
- ☐ Onsite contact information for all event staff if available (e.g. cell phone numbers).

FOUR-SIX WEEKS BEFORE THE EVENT

FINALIZE REGISTRATION PROCEDURES

- ☐ Create spreadsheet (electronic is ideal) to track who has registered—including names, and pertinent demographic information such as grade level of participants or other useful information, how much money has been collected, T-shirt or patch orders and sizes, etc.



EVENT PLANNING TIMELINE & CHECKLIST

- ☐ Collect registration payments for activity/admission fees
- ☐ Periodically share the spreadsheet with committee members to allow them to plan and help to promote event to those who haven't yet registered.
- ☐ If the event fills, create a waiting list to fill spaces created by cancellations.
- ☐ Deposit money collected into the service unit checking account on a regular basis.
- ☐ Periodically reconcile amount deposited with registration records.
- ☐ Send information packets to event staff, consultants, and/or vendors with event schedule, directions, map, and emergency plans for the event. Confirm in writing what to expect at the event.
- ☐ Distribute confirmation packets to participants with schedule, directions, what to bring, and safety considerations.
- ☐ Remind troop/group leaders of their responsibility to bring forms, distribute emergency cards to all adults, etc.
- ☐ Finalize event schedule.
- ☐ Borrow or purchase needed equipment, supplies.
- ☐ Verify equipment/set-up needed and site rules with site liaison .
- ☐ File Trip or High Adventure Approval Form with council if any activities are high adventure, or event will be 3 nights or longer (1 form for whole event—troops do not need their own).

PREPARE EVENT EVALUATION FORM

- ☐ What was the goal of the event? What knowledge, skills, and abilities will the participants have when they leave?
- ☐ Which of the 5 Girl Scout Leadership Experience (GSLE) outcome(s) will the event focus on?
- ☐ Which Girl Scout Process(es) will the event focus on Girl Led, Cooperative Learning, or Learning by Doing?
- ☐ Participants (girls and adults) should complete the evaluation. It is also great to have event staff and the Event Manager complete evaluations as well.
- ☐ There are many types of evaluations that you can do. The following are just some ideas to get you started.
 - Verbal
 - Written , including rating scales, happy faces, free response questions
 - Pictures/drawings
 - Journal writing
 - Mural or graffiti wall
 - Observations (as girls are building fires observe their skills)
 - Evaluation games (go to this side of the room if you liked it, go here if you didn't)

2 WEEKS BEFORE THE EVENT

- ☐ Purchase special insurance for any non-registered participants (non-registered event staff, parents, siblings, non-member girls, etc.) Contact insurance@girlscoutsnorcal.org
- ☐ Finalize emergency phone tree and provide to at home event emergency contact person.
- ☐ Follow up with event staff, consultants, and vendors.
- ☐ Prepare rosters/sign in sheets for all girls & adults .
- ☐ Visit site to verify set-up and equipment operation.
- ☐ Finalize list of items to bring to event, begin packing them.
- ☐ Purchase remaining needed items.
- ☐ Determine signs needed and prepare them.
- ☐ Enlist clean up help and other volunteers.
- ☐ Check weather forecasts, take precautions accordingly , such as supplying adequate drinking water on hot days .
- ☐ Download several copies of Media Information Sheet.
- ☐ Establish Lost & Found procedures



EVENT PLANNING TIMELINE & CHECKLIST

DAY OF THE EVENT

- ☐ Arrive early and ensure that site is left clean.
- ☐ Circulate among event staff, communicate and inspire—be enthusiastic.
- ☐ Troubleshoot problems as they arise; expect the unexpected.
- ☐ Set up equipment and post signs at least one hour before start time.
- ☐ Event Manager should be free of tasks that prevent giving direction; delegate tasks that suddenly occur.
- ☐ Welcome and direct the event staff and vendors.
- ☐ Set up activity stations 1 hour + before start time.
- ☐ Treasurer brings checkbook to pay any bills.
- ☐ Acknowledge committee members, event staff, consultants, etc.
- ☐ Ensure that site is left clean.

CHECK IN PRE-REGISTERED PARTICIPANTS:

- ☐ Have plenty of people processing check in so the line moves quickly.
- ☐ Allow time for check in before event starts.
- ☐ Create a check-off list of participants who have pre-registered. Have numerous copies available.
- ☐ Consider having stations that break up the alphabet or troop number list to keep lines moving e.g. A-F line one, G-M, etc. or Troop # 1-296 here).
- ☐ If participants register as individuals, collect permission forms, Health History forms, as appropriate.
- ☐ If participants check in with troop/group, collect individual participant roster for group.
- ☐ Provide participant or group leader with needed items such as schedule, map, “passport”, wrist bands, patch, evaluation, etc.
- ☐ If selling items such as patches or T shirts, keep a secure cash box. At the end of the event, the cash should be counted by two people together and turned over to Treasurer or Event Manager with the total count in writing signed by both individuals.
- ☐ Communicate procedures for girls to check out of the event, girls who leave early, etc. Ensure that girls are only released to approved individuals.
- ☐ Give instructions about where to go next, what to do next.
- ☐ Make sure there is adequate space in a safe area for participants to wait before the event begins. Consider having song leading or other activities to keep participants from becoming too restless.

SAMPLE EMERGENCY PLAN:

In the event of an accident at the event:

- Nearest adult should stay with & comfort the injured victim(s). First aid should not be performed by anyone other than a certified First Aider, except in a life threatening emergency.
- Another adult should act as a runner to notify the manager and First Aider. (If no adult is available, two girls may be dispatched as runners to locate another staff member or the event manager).
- Once the First Aider arrives at the scene, first aid will be administered and a decision will be made whether to take the victim to the emergency room, to request a doctor or an ambulance, or to request law enforcement personnel.
- Either the First Aider or the Event Manager will place the call for more aid.
- A determination should be made at this point if the accident constitutes an emergency and the steps listed for council emergency management in *Volunteer Essentials* should be followed.

*Note: This is just the part of an emergency plan for accidents.



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AFTER THE EVENT

EVENT BINDER OR SCRAPBOOK::

- ☐ Flyer, other promotional materials
- ☐ Registration form
- ☐ Confirmation packet
- ☐ Handouts/booklets
- ☐ Pictures of how things were set-up
- ☐ Pictures, samples or descriptions of activities
- ☐ Site and vendor information
- ☐ Income and expense information
- ☐ Final attendance numbers
- ☐ Patch
- ☐ Evaluation Summary
- ☐ Anything else that would be helpful to someone running this or a similar event in the future



COMMITTEE, STAFF WRAP UP:

- ☐ Hold wrap-up meeting/celebration with event committee/staff to de-brief and recognize them for their accomplishments.
- ☐ De-brief the event with staff and committee
- ☐ Recognize people for their accomplishments with public praise, a certificate, small gift, thank you note, as appropriate.
- ☐ Write thank you letters, perhaps send a certificate of appreciation to other small token to recognize contributions of time or money (event volunteers, vendors who attended, etc.).
- ☐ Write thank you letters and acknowledge service hours for girls who assisted with event planning or helped at the event.



FINANCIAL:

- ☐ Pay remaining bills and reimburse volunteer expenses
- ☐ Complete Event Financial Report Form

REPORTING:

- ☐ Submit Event Notification & Report Form to service unit within two weeks of the event
- ☐ Submit Financial Form for Events to service unit within two weeks of the event. Include all original receipts and any remaining funds
- ☐ Submit Donation Form to council
- ☐ Compile evaluations and give results to Program Support Manager or report at a service unit team meeting.



MISCELLANEOUS:

- ☐ Follow up with patch distribution, if needed
- ☐ Return borrowed equipment
- ☐ Refurbish consumable resources (e.g. first aid kit)
- ☐ Write thank you letters
- ☐ Celebrate a job well done!

