



HUDSON VALLEY COUNCIL

YOUTH DEVELOPMENT COMMITTEE

EAGLE SCOUT PROCESS

This is a guideline for Districts, Units, and Scouts; it applies Council-wide. Questions may be directed to the Council Youth Development Committee Chair. This guideline defines a multi-part process. Part 1 deals with the creation and approval of Eagle Scout Service Project Proposals. Part 2 deals with Project Development (creating a Project Plan), and related detail approvals. Part 3 deals with Project completion, and creation and approval of the Project Report. Part 4 describes preparation for a District Eagle Board of Review. Lastly, this document has an Appendix, which contains definitions of the major terms used in this guideline.

Each District will develop a calendar or list of dates for three events: 1) Project Proposal submission, 2) District Proposal Reviews, and 3) District Eagle Boards of Review. The Council website's Calendar (an interactive function) will contain each District's Proposal Review and Eagle Board dates. A District can add to or alter its dates in this online calendar as circumstances require. Paper versions of these dates are usually distributed early in the Scout Program Year (usually July to June) but verification online is highly recommended as the year goes by.

1) Eagle Scout Service Project Proposal

- a) Scout develops a project idea and discusses it with his unit leadership, as well as a representative of the organization that would receive the benefit of the project (i.e. the Beneficiary). The Scout should also have his parents read the Eagle Scout Service Project Workbook as National BSA intends.
- b) Guidelines for project ideas are found in the current Eagle Scout Service Project Workbook (<http://www.scouting.org/Home/BoyScouts/AdvancementandAwards/EagleWorkbookProcedures.aspx>), front section pages 4-6 and the Proposal Page A.
- c) The Scout should reach agreement with his unit leaders that he is on the right track, that he has a project idea that falls within the Guidelines. That idea would then be further developed by the Scout, by completing Workbook Proposal pages B through E. Unit leadership should assist the Scout in completing the Project Proposal. General ideas and vagueness are allowed – but the sections of the Proposal should be consistent. For example, the statements in the Project Description should contain some specific facts and captioned pictures. Subsequent workbook sections entitled Giving Leadership, Materials, Supplies and Tools should support the Project Description – and vice-versa.
- d) Meetings with the Project Beneficiary Representative must also take place during the development of the Proposal, to ensure that the beneficiary is in agreement with what the Scout is proposing. The Scout is expected to give the Project Beneficiary Representative a copy of the last two pages of the Workbook - a document called "Navigating the Eagle Scout Service Project". The Scout should also understand what that document says.

- e) When ready, the Scout signs the Candidate's Promise on Proposal Page E. He should note the seriousness of the promise that he is making.
- f) Approval signatures on Proposal Page E must then be obtained from the Project Beneficiary Representative, the Scoutmaster, and the Troop Committee. Each Troop can define in writing its own procedure for Troop Committee approval and the order of signatures. If not, National allows any order, and simply wants the Committee signature to have proper authorization.
- g) The Scout then contacts the District Advancement Chair (DAC) or District Eagle Coordinator (DEC) to submit electronic or paper copy / copies of the proposal for preliminary review. Pre-review looks for completeness and correctness of information, consistency, clarity and conformity to BSA guidelines. While the Project Description section may be brief, it must be sufficient to adequately show that the "Five Tests of an Acceptable Eagle Service Project" (found on Proposal Page A) will be met. Additional information can be appended to the proposal, as needed.
- h) The DAC or DEC may assign a District team member to pre-review the Proposal. This will determine if there is sufficient information provided to move forward and schedule his District Review. If the pre-review is positive, the District team member will provide any feedback there might be from the initial review of the proposal, and provide the Scout with any specific questions that he should be prepared to answer when he attends the District Proposal Review. Other than continued planning, no actual work on the Project may be initiated prior to approval by the District.
- i) If the Proposal is unclear or lacks sufficient information, the Scout and appropriate unit leadership will be contacted, and given instructions on what needs to be done to the Proposal before the District Review will be scheduled. This will help the unit leadership understand what was lacking, in order to better assist other Scouts going forward.
- j) The DAC or DEC will contact the Scout (approximately 1 week ahead of time) and provide the time and place details for the District Proposal Review.
- k) During the Proposal creation, the Scout has identified whether he will need to do fundraising (of approximately how many dollars or what quantity of supplies) and whether the project location is outside the Council boundaries. After a successful District Proposal Review, he will need to get specific approvals for those matters, by completing the Workbook's Fundraising Application and/or a Tour and Activity Plan.
- l) At the end of the District Proposal Review, the DAC, DEC or their designee will sign the Proposal Page E, allowing the Scout to go forward with his project.

2) Post District Approval

- a) The Scout should then complete his Workbook's Project Plan, Pages A through E. This is his best time to gain the advice and wisdom of his Project Coach: refer to the Guide to Advancement section 9.0.2.9.
- b) If the project is located outside the boundaries of the Hudson Valley Council, use the on-line Tour and Activity Plan, which must be filled out by a leader of the unit with input from the Scout and submitted

electronically. (Only unit leaders are authorized to use the online system used to create a Plan.) A printed copy of the approved Tour and Activity Plan should be included with the Project Report.

- c) The Fundraising Application pages follow the Project Plan section. Page A is the form; Page B has the instructions. If a Fundraising Application is required as specified by the instructions on Page B, use the form in the Workbook on Page A – do not use a Unit Money Earning Application. Complete it by following the instructions on Page B. Note: if the box on Page A is too small to identify donors, etc., then a list of donors etc. is to be attached as directed by the asterisk instruction.
- d) If the amount of funds and/or the value of material donations to be raised equals or exceeds \$500, the form can be scanned and sent via email to Advancement@hudsonvalleyscouting.org or mailed or faxed to the council office (attn.: Youth Development Committee Chair). Each Scout will hear back within two weeks. Approval will be sent back via email to the Scout, with copy to his unit leaders and the respective DAC. A printed copy of the approval email should be made part of the Project Report. No fundraising is permitted prior to this approval.

If that amount as noted above is less than \$500, the approval is handled by and granted by your DAC or DEC.

- e) The Scout's Fundraising Application and/or Tour and Activity Plan can be developed and submitted while he completes his Project Plan.

3) Eagle Scout Service Project Completion Considerations

- a) The Scout should review the Project Report section of the Workbook before starting work, to determine areas of required record-keeping during the project.
- b) Minor changes to the project's original plan are to be documented as part of the Project Report. Examples of minor changes would be color changes, or things that do not materially change the expected outcome.
- c) Major changes to a Project raise the question "Does the Project still provide the leadership opportunities that the original Proposal did?" Consequently, the Proposal Approvers must be consulted.

Any major change(s) that the Scout believes must be made, or that are requested by the Project Beneficiary Representative, must be discussed with the unit leadership before the change is made. In most cases, major changes would include adding or removing specific parts of the project that were documented in the original Proposal.

Examples would be: adding or dropping any major component of a construction project that would alter more than 20% of the total project, or changing the overall dimensions of anything being constructed by more than 20%.

The DAC or DEC must also be contacted when any significant portion of the project is changed or removed. The DAC or DEC will then determine if any formal review and approval is required.

- d) When the project is finished, the Scout completes Project Report pages A through C of the Workbook, to document the project.

- e) The Scout should then sign and date the Candidate's Promise on Project Report Page C. The Project Beneficiary Representative and Unit Leader should review the entire Project Workbook, prior to approving the project by signing and dating their Approval on Project Report Page C.

4) Eagle Board of Review (EBOR) Procedures

- a) The Eagle candidate should work with the Unit's Advancement Chair (UAC) in developing the Eagle Scout Rank Application (ESRA) - http://www.scouting.org/filestore/pdf/512-728_wb_fillable.pdf.
- b) The UAC should utilize the BSA's "Internet Advancement" web application to verify the official National BSA advancement record of the Scout. The UAC should ensure that the National records agree with Unit advancement records. If not, then missing rank advancement and/or Merit Badge(s) must be reported via the Internet Advancement tool. After updating it, the UAC will provide a copy of the accurate National record to the Scout. This information will assist the Scout in completing the ESRA.
- c) The remaining parts of the ESRA should be completed. The Scout should prepare his "Statement of Life Purpose and Ambitions" and his list of Honors and Awards, as stated under Requirement 6 of the ESRA, so they can be submitted with the ESRA after his Scoutmaster's Conference.
- d) The Scout should then contact the unit Scoutmaster and schedule a Scoutmaster conference.
- e) The Scout then contacts the Unit Committee Chair in order for the unit to schedule a meeting to review the Scout's ESRA, have an appropriate discussion, and sign the ESRA. Note: this meeting must not be a preliminary or preparatory or practice Eagle Board of Review. The unit should make a copy of the signed ESRA for use in requesting Letters of Recommendation, and the Scout should be given a personal copy.
- f) Eagle rank requirements 1-6, including the Eagle Scout Service Project, must be completed prior to the Scout's 18th birthday. The original completely-signed ESRA and Requirement 6 attachments are taken or sent to the Council Office. The Scout and his leaders should keep in mind that the Scout is allowed only 3 months after his 18th birthday in which to have his Board of Review without special approval. ESRA verification, Board scheduling, and other administrative processes take time. Thus prompt delivery to the Council Service Center is strongly suggested.
- g) Copies of the Project Workbook are not to be delivered to the Council office.
- h) A Council staff member will review the ESRA to determine if all information is accurate and complete. Any issues that require attention will be communicated back to the Scout and his unit leaders. If need be, the Scout will be asked to provide original proof documents, such as merit badge "blue" cards. The Scout should then work with the appropriate unit level person to resolve the issues and resubmit the ESRA.
- i) When all is in order, the Council staff member will then contact the unit Scoutmaster and the DAC and approve the scheduling of the Eagle Board of Review. At this point, the DAC/DEC is permitted to schedule the EBOR.
- j) Following District guidelines, the Scoutmaster, the Committee Chair, or their designated representative will then contact the DAC/DEC to request and schedule the District EBOR. The Scout will be consulted in

selecting this date. There is only one EBOR at the District level – no preliminary meetings, no dialog with the Scout or unit unless there is an issue with the submitted forms.

- k) Copies of sections of the Eagle Scout Service Project Workbook (or the entire Workbook) must be submitted (electronically or in hard copy) in accord with District procedures and timelines.
- l) The DEC or DAC will contact the Scout (approximately 1 week ahead of time) and provide the time and place details for the District EBOR.
- m) The Eagle candidate must be accompanied at the EBOR by a unit committee leader. There are rules governing the staffing of an EBOR. See the “EBOR” definition in the Appendix.
- n) Letters of recommendation will have been requested by unit leadership on behalf of the Scout. EBOR are generally scheduled after the Letters have been received back by the unit leader. They are to be brought unopened to the EBOR by the unit leader. Lack of any letters of recommendation will not preclude the conduct of the EBOR.
- o) Upon successful completion of the EBOR, the ESRA will be signed by a District Advancement representative. An Advancement Form (BSA #34403) will be filled out and signed by at least 3 EBOR members. Both documents will be submitted to the Council office according to District processes. As per BSA policy for BSA confidential documents, reference letters are kept by the District and are not allowed to given to the Scout or unit. When no longer needed, they will be destroyed.
- p) The Scout is declared an Eagle Scout following the successful completion of the EBOR. General planning for his Eagle Court of Honor may begin within the troop leadership and in agreement with the Scout and his parent(s) or guardian(s). However, until the National Office reviews the information submitted by the Council Office and sends the Scout’s Eagle credentials to the Council Office, an Eagle Court of Honor should not be conducted.
- q) The Scout's unit will be informed of the arrival of the Eagle credentials at the Council Office. The unit (and Scout’s family) may then arrange an Eagle Court of Honor at which to present his award.
- r) Purchase of the Eagle badge, medal, and/or the presentation kit is restricted. The Eagle Credentials Packet provided to the unit includes an authorization to purchase any of these restricted items from the Scout Shop. This authorization must be shown to Scout Shop staff when purchases are made.

Appendix

1) Definitions

- a) Eagle Board of Review (EBOR) – a group of no fewer than three and not more than six adults, each at least 21 years of age, from the District Committee and Unit’s Committee or Community, as approved by the DAC or DEC. Unit leaders and assistants (Scoutmaster and Assistant Scoutmasters) may not serve on a Board of Review for a Scout in their own unit. The Scout’s parents, guardians, and relatives also may not serve on a board. The candidate or his parent(s) or guardian(s) shall have no part in selecting any EBOR members.

Hudson Valley Council EBORs are conducted at the “District” level. The DEC or DEC (or a DAC member designated by the DAC or DEC) will be the EBOR chair, as defined in the Guide to Advancement 8.0.3.0.

The purpose of an EBOR is “to determine the quality of his experience, and decide whether he has fulfilled the requirements for the rank”. See the Guide to Advancement sections 8.0.1.0-3 for details.

- b) District Advancement Committee (DAC) – led by the District Advancement Chair, and may contain adults acting as Eagle Coordinators.
- c) District Eagle Coordinator (DEC) – a member (or members) of the DAC whose focus is primarily on the processes for Eagle advancement.
- d) Eagle Scout Rank Application (ESRA) – the latest version of the official National Boy Scouts of America application for the rank of Eagle Scout. This original form (no photo copies) must be used, either completed using a computer and Adobe software, or printed and filled out legibly in ink. There are advantages to using the fillable PDF version; it is recommended. Merit Badges not chosen among the required ones need to be crossed out. Signatures are required from the Eagle Candidate, his Scoutmaster and his Committee Chair
- e) Project Coach (PC) – an adult who mentors the Scout specifically during the planning and execution of the Eagle Scout Service Project. There are two aspects to this role: technical advisor regarding the project’s tasks, and administrative advisor regarding the Eagle rank process.

“Project Coaches must be registered with the BSA (in any adult position) and be current in BSA Youth Protection training” throughout the Project.

While a Scout does not have to have a Project Coach, it is strongly suggested that he has one. They can have this role filled by an adult associated with the unit, including the unit Eagle Advisor.

- f) Unit Advancement Chair (UAC) – a person in the unit primarily responsible for recording Scout advancement and holding unit Boards of Review for rank advancement.
- g) Unit Leadership (UL) – For the purposes of Eagle Service Project approvals, unit leadership generally refers to the Scoutmaster, the Committee Chair, or their designated representatives. For purposes of advice, unit leadership may also include Assistant Scoutmasters, Eagle Advisors, Eagle Project Coaches, etc.