



Annual Program Planning and Budgeting—Do this with your Troop...and *THRIVE!*

I. What is this all about?

Trail Life USA's goal is to transform the lives of boys using the tools of fun and adventure. Families who drop out of Trail Life USA will likely do so because they believe their Troop failed to "keep the promise" of providing a full, fun program with lots of trips and outdoor experiences.

So how do you plan a great program? You (Troop Leaders) begin by gathering all of your "stakeholders"—parents, leaders, and Trailmen— all together— near the end of the summer (this **MUST** be completed before school starts, so anywhere from mid-July to early August is ideal). When all are gathered, the Troopmaster should open the meeting by explaining "why we're here": to *make sure* your Trailmen get a top-quality, adventure-filled program. They will do that by planning the annual program, and then budgeting for the real costs involved. The Troop Master, Committee Chair and Treasurer should work together on this. All "stakeholders" should know that this is a *whole Troop* process and decision.

II. Program Planning

Take out a big flip chart (or a laptop with a projection screen if you wish) and start brainstorming. The presenter asks: "What does everyone really want to do this year, starting this fall?"

Attendees will shout out things they want to do as a Troop—one month at a time, starting with September and working through next summer— as you record their suggestions. They will naturally think of camping trips and activities— parades, banquets, holiday gatherings; then you fill in the necessities—recruiting new families (Join The Trail), completing the re-charter, leader training, fundraisers; and buying stuff—uniforms, equipment, Trail badges, handbooks, etc. Your Troop will soon have a full, year-round calendar of activities listed on one big sheet of paper. Thank everyone for taking part. If you have an activity planned, release the boys to do that at this point, but keep the parents in the room.

III. Budgeting

Now you know what the people in your Troop want to do, and you know they'll attend the activities *because it's their plan*. And you will have added in all of the "required" things as well. Now there's only one issue left to tackle: MONEY! It is time to show the adults them the **SIZE** of the money problem by quickly attaching a cost to each activity. *Estimate* the number of Trailmen and leaders who will participate, and estimate the resulting costs. For example, sending 20 Trailmen plus 10 leaders to a weeklong Summer Adventure at \$200 each (including meals and travel) totals \$6,000!

Estimate a total cost *for each activity* now on the Troop calendar (you won't have time to figure *exact #'s* at this time— "ball park" figures are good enough, and you should be able to get some good estimates based on previous experiences, or some brief discussion). When you are finished with this exercise, total the costs on the chart...the crowd will be shocked!

Many Troops' annual programs will cost \$20,000 or more! See this simplified calendar with budget below—this is what your flip chart might look like at this point.

Troop 1:10	Activity	Budget 2014-2015
September	Troop Standards	560.00
	Trailman Handbooks	400.00
October	Rocket Derby	150.00
	Fall Area Family Campout	650.00
November	Ice Cream Social	175.00
December	Uniforms	1,700.00
	Recognition Banquet	440.00
January	Recharter	195.00
	Re-registration (Trailmen)	520.00
	Adult Re-registration	260.00
February	Soap Box Derby Racers	75.00
March	USS Yorktown Trip	900.00
April	Camping Equipment	1,200.00
	Spring Area Campout	550.00
May	Raingutter Regatta	200.00
June/July	Summer Adventure	5,400.00
	Program fees	400.00
August	Fall Recruiting materials	200.00
Year-round (on-going expenses)	Monthly Campouts	1,600.00
	3 Service Projects	600.00
	Awards & medallions	900.00
	Leaders' Meetings	250.00
	Troop Meeting materials	200.00
	Treasurer Materials	75.00
Total Expenses:		17,600.00
Income:	Candy Sales--Net	13,000.00
	Spring fundraiser	4,650.00
Total Income:		17,650.00
Surplus (or Deficit)		50.00
<p>This Budget represents a Troop's TOTAL costs (meaning all Trail Life-related expenses, whether these are traditionally "Troop" or "per family" costs), <i>after a family has joined.</i></p>		

Now what? Well, here are three ways to fulfill the promise to offer a robust program (but first, decide that *breaking* the promise altogether and providing a scaled-down, not so fun, less-than-quality program should not be an option):

OPTION #1: Parents pay for everything... either charge a huge joining/activity fee (hundreds of dollars), or “nickel-and-dime” them to death every time we want to do something and hope they don’t notice how much this is costing. Ask: “HOW MANY THINK THIS IS A GOOD OPTION?” (Hopefully, no one will like this!)

Paying hundreds of dollars each year, whether all at once or throughout the year, is simply *not an option* for most families. So, ask them: “WOULD **YOU** RATHER PAY FOR YOUR SON’S YEAR OF ADVENTURE, OR LET YOUR **NEIGHBORS** DO IT?” (Most will laugh and respond “NEIGHBORS!”)

So, fundraising is the key to making this affordable for families. In light of this, which of the remaining options is better? Do you...

OPTION #2: Ask parents to spend two weekends *every month* doing car washes, bake sales, holiday fundraisers, or fifty other ineffective ways to get enough cash to cover the events. Ask: “HOW MANY THINK THIS IS A GOOD OPTION?” (This causes burnout. Hopefully, no one will like this plan!)

OPTION #3: Ask families to spend 5-6 total days over a 4-week period focused on one well-executed fundraiser that will cover most of the costs of the program we described. Ask: “NOW, HOW MANY THINK **THIS** IS A GOOD OPTION?” (Everyone should agree!)

Giving Trailmen *one good fundraiser*, keeping them focused on it for a few weeks—then leaving fundraising behind, and concentrating on carrying out the fun outdoor program—is clearly the best method.

FYI—Trail Life USA has already formed a national partnership with Heart and Soul Candies, which has a proven track record of success working Trail Life, and even longer with American Heritage Girls. Bill McGee, their President and CEO, is committed to Trail Life USA’s vision, and his company will help you achieve your goals. Check out www.heartandsoulcandies.com/tlusa.

IV. Follow Up

Once your initial draft calendar and budget are established, take the time to determine accurate costs for each level of the program—Woodlands Trail, Navigators, and Adventurers. We have provided a useable, real life example of this (see attached fillable spreadsheet).

All cells are changeable, so your Troop Treasurer can use this spreadsheet to put in the activities and costs for your Troop. Once you have filled in all of the cells, share the final document with all parents in the Troop, and review the process—how these decisions were made. Continue communications with updates on the Troop website/Troop Track when there are any additions or changes.

V. Fundraising Tips

More help will be offered regarding the “How-to’s” of successful fundraising, such as comparing house-to-house vs. storefront sales, listing potential customers, and the “proper way to ask” (believe it or not, 7 simple words will secure the sale: “Will you help me earn my way...”)!

Use these tips for Planning and Budgeting...and THRIVE all year long!