



ANNUAL Planning & Budgeting

FOR TROOP COMMITTEE MEMBERS

2024/25



Why Plan?

Annual Troop Planning plays an essential role in fulfilling the mission of Trail Life USA. This guide is designed to assist the Troop Committee in that process in a straightforward, easy way. Regardless of your role in the Troop, a well-planned program year yields numerous benefits including:



- Increased retention of current Trailmen who are having fun all year long at activities they helped determine
- Increased recruitment of new boys to the Troop, whether during the traditional “Join the Trail!” season, or any other time of year
- Increased recruitment of leaders who can more easily acclimate to their new role
- Advanced planning gives you the greatest chance of getting reservations at the best events, and avoids your Troop being shut out of events with attendance caps.
- Fundraising goals are easily determined when you know what you want to do and you can take advantage of early registration discounts
- Time to complete basic or advanced leader training or physical conditioning for high adventure activities
- A more relaxed year, because you know exactly what needs to be planned, when to do it, and who’s coordinating each activity
- Increased participation by Trailmen, resulting in more opportunities for building relationships and mentoring (aka “Ministry Minutes”)
- Demonstration of respect for your church’s scheduling

You will find that establishing a plan will create a more productive and exciting year of adventure for your Troop. So block off some time, get the whole Troop together, and organize your best year yet!

Steps to Plan Your Year

STEP ONE:

Research Area, Regional, Charter Organization, Nationwide, and community events for consideration in the schedule. (See pages 4-5)

STEP TWO:

Schedule and hold an Annual Planning "Dream" Session. (See pages 6-7)

STEP THREE:

Finalize the schedule and budget. (See pages 8-9)
Add to your Troop's calendar in Trail Life Conect.

STEP FOUR:

Plan your first event. (See sample event planner on pages 10-11)

NOTE: The timing suggested in these guides is for Troops operating on an August-May school year schedule, with a "kick-off" meeting to start the Fall; however, the same process can be used by Troops that meet year-round, or those that start mid-year. Simply adjust the suggested dates to meet your schedule.



STEP ONE

Research Activities

Consider these Nationwide events for your Troop and add Area, Regional, Charter Organization, and community event possibilities. Include service projects, fundraising events, camping, local attractions, recruiting opportunities, outdoor activities, leader training courses, award ceremonies, etc.



Events



Ribbon Opportunity

July 2024

Date Activities

- Annual Troop "Dream" Session (page 6).....
- _____
- _____
- _____
- _____
- _____

August 2024

Date Activities

- _____ Troop Leaders Attend Area "Program Kickoff"
- _____
- _____
- _____

September 2024

Date Activities

- Join the Trail! Open House
- Sept 8 - Trail Life Sunday
- Sept 25 - See You at the Pole
- _____
- _____
- _____

October 2024

Date Activities

- _____ New Family Onboarding Leader Training
- _____
- _____
- _____
- _____
- _____

November 2024

Date Activities

- November 29 - Black Friday Sale
- Operation Christmas Child
- _____
- _____
- _____
- _____

December 2024

Date Activities

- All-In Membership Inventory
- _____
- _____
- _____
- _____
- _____

January 2025

Date	Activities
<input type="checkbox"/>	Attitude of Gratitude 📖
<input type="checkbox"/>	Respect Life 📖
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

February 2025

Date	Activities
<input type="checkbox"/>	Respect Life 📖
<input type="checkbox"/>	_____ "Bring a Buddy" Recruiting
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

March 2025

Date	Activities
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

April 2025

Date	Activities
<input type="checkbox"/>	April 25-27 - Nationwide Campout 🧑🏻🧑🏻🧑🏻
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

May 2025

Date	Activities
<input type="checkbox"/>	May 1 - National Day of Prayer 🙏 📖
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

June 2025

Date	Activities
<input type="checkbox"/>	Serve in Love 📖
<input type="checkbox"/>	_____ Weeklong Summer Adventure
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____



2025 & Beyond

Use this space to record long range planning ideas like Trail Life Conventions, Summer Adventures, High Adventure treks, mission trips, etc.



Date	Activities
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

STEP TWO

PLAN AND HOLD YOUR "DREAM" SESSION



DETAILS	SUGGESTED TIMELINE												
<p>Schedule your Troop's Annual Planning "Dream" Session for late July, plus follow-up meetings outlined below. Afterward, add all dates to your Troop's calendar in Trail Life Connect.</p>	<p>April/May</p>												
<p>Promote your Troop's Annual "Dream" Session to families through multiple methods:</p> <table border="0" data-bbox="177 1352 971 1915"> <thead> <tr> <th data-bbox="177 1352 651 1407">RESPONSIBLE PERSON</th> <th data-bbox="704 1352 971 1407">ON DATE:</th> </tr> </thead> <tbody> <tr> <td data-bbox="177 1411 651 1507">Announcement in TLC _____</td> <td data-bbox="704 1411 971 1507">_____</td> </tr> <tr> <td data-bbox="177 1512 651 1608">Email all parents _____</td> <td data-bbox="704 1512 971 1608">_____</td> </tr> <tr> <td data-bbox="177 1612 651 1709">Troop Social Media Group _____</td> <td data-bbox="704 1612 971 1709">_____</td> </tr> <tr> <td data-bbox="177 1713 651 1810">Group Text or Chat _____</td> <td data-bbox="704 1713 971 1810">_____</td> </tr> <tr> <td data-bbox="177 1814 651 1911">Other Ways... _____</td> <td data-bbox="704 1814 971 1911">_____</td> </tr> </tbody> </table>	RESPONSIBLE PERSON	ON DATE:	Announcement in TLC _____	_____	Email all parents _____	_____	Troop Social Media Group _____	_____	Group Text or Chat _____	_____	Other Ways... _____	_____	<p>June and July</p>
RESPONSIBLE PERSON	ON DATE:												
Announcement in TLC _____	_____												
Email all parents _____	_____												
Troop Social Media Group _____	_____												
Group Text or Chat _____	_____												
Other Ways... _____	_____												

DETAILS	SUGGESTED TIMELINE	OUR TROOP INFO
<p>Gather your “stakeholders” (<u>a</u>ll leaders, parents, <u>a</u>nd Trailmen) and hold your Annual Planning “Dream” Session.</p> <p>Goals:</p> <ol style="list-style-type: none"> 1) Achieve buy-in from all Troop member families—so it’s <u>their</u> plan; and 2) Help them understand the costs involved to offer a full year of fun and adventure <p>Supplies:</p> <p>A large board to write on and some dry erase markers. Promote special giveaways for each family that participates, like an inexpensive Trail Life bumper sticker, flashlight or other small item.</p> <p>How:</p> <p>A well-spoken, upbeat leader asks everyone: “What do <u>y</u>ou want to do this year?” Another person records the audience’s suggestions as they are yelled out, writing down every idea mentioned. Have other leaders clued in to mention the less-exciting essentials: handbooks, uniforms, equipment, leader training, annual re-registration costs, annual program service fee (\$20/youth), etc. You can get the ball rolling by mentioning the ideas for consideration identified in Step I.</p> <p>Watch a short video depiction of this meeting at http://bit.ly/2Tvqlut</p>  <p>During the meeting, a couple of leaders, including your Troop Treasurer, should quickly estimate the number of attendees for each event recorded and multiply by the estimated cost for each. Add up all the items, and you can roughly estimate the grand total costs for a full year. Whether it’s \$5,000 or \$25,000, the impact when you <u>announce the total cost</u> will create “sticker shock”! Assure attendees that the Troop Committee will take a closer look at the suggestions, agree on realistic numbers of attendees and activities, and recommend the best way to pay for this awesome year of fun and adventure!</p>	<p>Last Week in July</p>	<p style="text-align: center;">Date/Time</p> <hr/> <p style="text-align: center;">Supplies</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <p style="text-align: center;">Facilitator:</p> <hr/> <p style="text-align: center;">Recorder:</p> <hr/> <p style="text-align: center;">Cost Estimator(s):</p> <hr/> <hr/>
<p>Ask your Troopmaster to schedule an Annual Program Planning Meeting with youth and adult program leaders soon after the “Dream” session to determine and schedule their unique advancement activities and high adventure plans.</p>	<p>Early August</p>	



STEP THREE

FINALIZE THE **SCHEDULE & BUDGET**

OUR TROOP INFO	SUGGESTED TIMELINE
Date: _____	Patrol Plans > (1st week in August)
Date: _____	Finalize Whole Troop Plans > (2nd week in August)
Date: _____	Explain the Need and Provide the Solution > (3rd week in August)
Date: _____	Bring in New Trailmen > (Early September)
Date: _____	Raise the \$\$ > (Late September thru October)



DETAILS

Youth and adult program leaders meet to finalize each Patrol's plans for the year so scheduling conflicts can be resolved and additional costs can be included in the budget.

Leaders meet and finalize the annual Troop calendar including:

- Troop and leader meetings
- Outdoor activities/camping trips
- Award ceremonies
- Service projects
- Fundraiser
- New Youth Member Recruiting

Including all the above elements ensures that each Trailman sees his favorite part of Trail Life in the plan.

Add all events to your calendar in Trail Life Connect!

The Troop Treasurer finalizes the budget and sends those actual amounts to all families. Explain what that \$\$ figure means to them specifically:
the cost per Trailman.

Make it clear that there are just two ways to pay for this:

1. Either parents pay out-of-pocket, or
2. Everyone works as a team on one well-run fundraiser to pay for it. This is the better option!

*Review the Annual Program Planning Spreadsheet at <http://bit.ly/2DZoh4C> or scan the QR code.



The Fundraising Chair(s) plan, promote, and execute a comprehensive, focused fundraiser.
See Part 4, Annual Troop Fundraising Guide for details.

Carry out your Open House plan and other Join the Trail! activities.
See Part 5, Join the Trail! Recruiting Guide for details.

STEP FOUR

PLAN YOUR EVENTS

Shared Leadership is the KEY! Here's WHO does WHAT:

Troop Planning Lead for this Event: _____

Troop Planning Assistant Lead: _____

Event Reservations/Registration Needed by _____

Made on _____

Event Payment/Deposit Needed by _____

Made on _____

Event Contact, Email, Phone, Website _____

Supplies Needed by Leaders:

(medical forms/permission slips, cooler/ice, reservation info, first aid kit, etc.)

Troop Health and Safety Lead _____

- Review Health and Safety Guide
- Adequate Youth/Leadership Ratio
- CPR/First Aid Trained Leader Attending

Troop Activity Planning: (see page 19)

More information available in Activities Risk Reference Guide in Trail Life Connect.

SAMPLE EVENT PLANNING TEMPLATE *(Copy as needed)*

EVENT FOR:

- Troop
- Patrol _____
- Woodlands Trail
- Navigators
- Adventurers
- Parents/Siblings

EVENT INFORMATION

Event Name:

Date(s) and Time(s):

Location:

Promotion/Communication Lead _____

Participant RSVP Deadline _____

Participant Departure/Return Meeting Location: _____

Date/Time _____ to Date/Time _____

Uniform: Trail Life T-shirt Travel Polo Troop Uniform

Footwear: Boots Closed-toed Shoes

Participants should bring/wear:

(water, lunch, money, notebook, pen, hat, handbook, gloves, chair, sunscreen, towel/suit, etc.)

Communication plan:

	Dates/Frequency		
Email			
Website Update			
Announcement			
Flyer/Handout			
Facebook			

Including the pertinent information from this page in your communications will ensure that participants are prepared and your event will be more successful.

JULY 2024

Recruiting/ Retention Tip:

Annual Planning and Budgeting is VITAL for a successful program year.



Health & Safety Tip

Leaders are required to wear the official TLUSA ID at every TL activity.



THIS MONTH:

- 2024 Join the Trail!

- Set Your Open House Strategy

- Hold Planning and Promotion Meeting for everyone in the Troop! 

- Hold Annual "Dream" Session

- Consider best fundraising vendors and strategies (see Part 4 Fundraising Guide)

AUGUST 2024

Recruiting/ Retention Tip:

Encourage every Trailman to bring a friend to the Join the Trail! Open House.



Health & Safety Tip

Follow your Charter Organization's approved youth release procedures.



THIS MONTH:

- Finalize all Join the Trail! promotion plans

- Finalize Fundraising Plan

- Attend your Area's Annual "Program Kickoff" event for all Troop Leaders

SEPTEMBER 2024

Recruiting/ Retention Tip:

Troops that hold one quality Fall fundraiser that pays for most of its annual costs always grow and thrive.





Health & Safety Tip

Send Youth Protection Essentials to all parents; those who are not leaders won't have taken the online CSYPT course.



THIS MONTH:

- Join the Trail! Open House  See Join the Trail! resources in Trail Life Connect documents section. Just search keyword "JTT." Additional free resources can be found at <https://www.trailifeusa.com/join-the-trail>
- Plan OCC Shoebox Drive or Packing Party and order supplies 
- Fundraising: Send tips, rewards, and reminders every week!
- Hold Fundraising Kick-Off as soon as new members have joined
- Onboarding Chair should host a new parent orientation meeting at the first Troop meeting following your "Join the Trail!" Open House.

OCTOBER 2024

Recruiting/ Retention Tip:

See the resource called "Get Woodlands Trailmen outdoors & active" for ideas. TrailLife-Connect/resources.





Health & Safety Tip

Gather TLUSA Health and Medical forms for all participants.



THIS MONTH:

- Join the Trail! 2nd Chance Signups - it's not too late to get new Trailmen registered. 
- Have all new parents complete Peak 1 training, and ALL leaders take Peak 2.
- Promote OCC Shoebox Drive or Packing Party. 
- Multi-Troop Camping event (usually hosted by the Area Team).
Get your Woodlands Trailmen camping!
- Get Woodlands Trailmen outside during Patrol Breakouts at EVERY Troop Meeting!

NOVEMBER 2024

Recruiting/ Retention Tip:

Have each parent download the TLC shortcut on their smart phone Home Screen (see TLC/Help). Then send them all Troop Announcements after each Troop Meeting!



Health & Safety Tip

Ensure everyone knows emergency procedures for meeting location.



THIS MONTH:

- Black Friday Trail Life USA Sale
- Operation Christmas Child Shoebox Packing Party! OCC's nationwide collection week is the 3rd week in November, so host yours in EARLY November! 

DECEMBER 2024

Recruiting/ Retention Tip:

Ensure Trailmen are registered so they can continue earning advancements including faith building elements.



Health & Safety Tip

Review TLUSA transportation rules.



THIS MONTH:

- All-In Membership Inventory 
- Check to make sure all registered adults wear their lanyards and are current with CSYPT.

JANUARY 2025

Recruiting/ Retention Tip:

Plan, promote, and prepare an exciting Summer Adventure opportunity for all levels. Warmer weather is coming.





Health & Safety Tip

Know TLUSA Incident Report filing requirements.



THIS MONTH:

- Attitude of Gratitude 
- Respect Life Begins 
- Prepare for next month's "Bring-a-Buddy" effort.

FEBRUARY 2025

Recruiting/ Retention Tip:




Try some peer-to-peer and Mom-to-Mom recruiting. See the "Bring a Buddy" post in the Leaders Digest section of Trail Life Connect for more information.

Health & Safety Tip

Review Activities Risk Reference Guide in Trail Life Connect.



THIS MONTH:

- Respect Life
Visit a Nursing Home, Crisis Pregnancy Center, or help those with Special Needs.
- A Trailman Values Life! 
- Emphasize "Bring-a-Buddy" each week.
Provide Prizes!
- Keep a lookout for the 2025-2026 Planning Guides in Trail Life
Connect and begin program planning for next year.

MARCH 2025

Recruiting/ Retention Tip:

Use the Patrol Method of youth leadership to provide real examples of growing godly young men.



Health & Safety Tip

Ensure required Youth/Leader ratios are followed.



THIS MONTH:

- Area Camporee (multi-Troop event); colder states may wait until April ... check your Area Events in Trail Life Connect.
 - Begin Planning for the next Program Year (Fall - Summer)
- Need help planning? Your local Area Team will lead a planning help session this month!

APRIL 2025

Recruiting/ Retention Tip:

Engage non-leader parents in conversations and involve them in Troop activities.



Health & Safety Tip

Arrange for leader First Aid and CPR training.



THIS MONTH:

- Multi-Troop Activity (such as an Area Camporee)
- Talk with Troop chaplain about how best he and others can carry out this month's Recruiting/Retention Tip.

MAY 2025

Recruiting/ Retention Tip:

Plan a year-round program full of all the TL essential elements.




Health & Safety Tip

Review 1-2-3 basics of youth protection on back cover. "No One-On-One" includes online communications.



THIS MONTH:

- National Day of Prayer 
- Review 2025 Join the Trail! Materials on the Trail Life Connect Help menu "JTT Recruiting Materials" and at trailifeusa.com/join-the-trail.

JUNE 2025

Recruiting/ Retention Tip:

Hold a fun non-Trail Life activity for Troop families (baseball game, picnic, cookout at a pool).




Health & Safety Tip

Share the current TLUSA Social Media Policy with leaders.



THIS MONTH:

- Finalize plans for 2025 Join the Trail! Activities and Events
- Hold your weeklong Summer Adventure
- Serve in Love 
- Schedule, Plan & Promote your Annual Planning "Dream" Session
- Officers' Annual Program Planning (Nav/Adv)



ACTIVITY PERMISSION **CHECKLIST**



For any activity in which your Troop would want to participate, first ask these four key questions:

- 1.** Is this activity legal/lawful in my area?
- 2.** Does my Charter Organization approve of this activity?
- 3.** Have we secured qualified supervision?
- 4.** Have we fully assessed the risks?

For further details and questions regarding particular activities, review the Health & Safety Guide and the Activities Risk Reference Guide located in Trail Life Connect.

POSITION & DESCRIPTION OVERVIEW



TROOP COMMITTEE: CORE LEADERSHIP TEAM

Troop Ministry Liaison is the Charter Organization's (church's) appointed official. The Troop Ministry Liaison selects and approves all Troop leaders, providing the spiritual authority, pastoral recommendation, and final oversight of its Troop's members.

Troop Chaplain ensures that the Troop emphasizes and stays true to its Christian mission. He leads by example, is qualified to give biblical advice, has a passion for discipleship, and involves and empowers other members (youth and adults alike) by providing opportunities for spiritual growth.

Committee Chair presides over Troop Committee Meetings and follows up with Committee members. He/She may appoint Committee members as needed to maintain an effective Troop. See typical positions listed below in "Other Leadership Roles".

Treasurer is a record-keeper, maintaining accounts for all financial transactions. He/she regularly reports the financial status of the Troop, coordinates and communicates to parents the process of Troop Budgeting, understands, coordinates, communicates, and supervises approved Trail Life USA fundraising guidelines, and handles Troop funds and pays bills.

Troopmaster Oversees all "direct contact" leaders (those volunteers who work directly with the boys each week), understands all programmatic operations of the Troop, and reports successes and systemic challenges faced by leaders and youth. He is the coach of, and Troop Committee representative for, the Ranger, Trailmaster, Advisor, and their Trail Guides.

SUGGESTION BOX:

"Volunteer-Driven" and "Shared Leadership" are among our most highly-regarded Core Values!

Look for the "Suggestion" icon throughout our Troop Resources and make sure you send us your ideas on how the resource can be improved.

The best ideas come from the field!



DIRECT CONTACT LEADERS

Ranger, Trailmaster, and Advisor Adults (age 21 or over) who oversee the operation of their specific age-levels within the Troop by providing direction, coaching, and support.

Trail Guides Adults (age 18 or over) who assist the Ranger, Trailmaster, or Advisor in delivering the program.

NOTE: 18-20 year olds can count as one of the required 2-deep leadership positions. The second leader must be age 21 or above – except for overnight activities, during which the second leader must be age 25 or above.

OTHER LEADERSHIP ROLES

(appointed as needed; may be added to Troop Committee)

Troop Advancement Chair ensures that the Troop holds regular Boards of Review (at least monthly), regular Courts of Honor, and provides opportunities for timely advancement within the Trail Life USA model. Also responsible for record keeping and submitting advancement reports.

Troop Outdoor/Activities Chair researches and secures permission to use camping sites or other outdoor locations for planned activities. Serves as transportation coordinator and ensures a monthly robust outdoor program for all levels.

Troop Membership Chairman ensures the Troop holds a “Join the Trail!” Open House event soon after school starts. Helps families navigate renewing their membership each year.

Troop Training Chair educates members about TLUSA training opportunities and maintains training records and printed materials. Assists leaders in obtaining First Aid, CPR, and other training as required.

Troop Onboarding Chairman contacts all new families immediately after the Open House to invite parents to the Parents’ Orientation (at the next Troop meeting). Plans the Parents’ Orientation meeting using the agenda in TLC documents. While this role is particularly active in the fall, it is important to welcome and assimilate new families who join throughout the year.

Troop Community Service Chair coordinates community service efforts which should include four Troop service projects per year.

Troop Secretary keeps Committee Meeting minutes and records, sends notices to members, etc.

Troop Equipment Coordinator works with the youth Quartermaster. Responsible for inventory, storage, and maintenance of equipment.

Troop Public Relations Chair provides news and announcements about the Troop to newspapers, websites, etc. May also be the Troop’s Webmaster and internal social media coordinator, and may manage other forms of internal communication. Promotes service projects and new membership drives and lets people in the area know that Trail Life USA is available.

Troop Fundraising Chair organizes and supervises fundraising events and ensures that every youth member has the opportunity and tools necessary to participate. Coordinates exciting kickoffs of your one or two focused fundraisers each year. Works closely with Troop Treasurer on details.

Troop Health and Safety Chair keeps everyone up to date on Trail Life USA’s policies and procedures. Maintains current and comprehensive knowledge of the Health and Safety Guide and related documents. Ensures activity permissions and notifications are filed with the Charter Organization and with the Trail Life USA Home Office as required.

Troop Committee Member may have various other responsibilities as defined by the Committee Chair.

My Troop Contacts AT A GLANCE



Name _____ Phone _____

Position _____ Email _____

Name _____ Phone _____

Position _____ Email _____

Name _____ Phone _____

Position _____ Email _____

Name _____ Phone _____

Position _____ Email _____

Name _____ Phone _____

Position _____ Email _____

Name _____ Phone _____

Position _____ Email _____

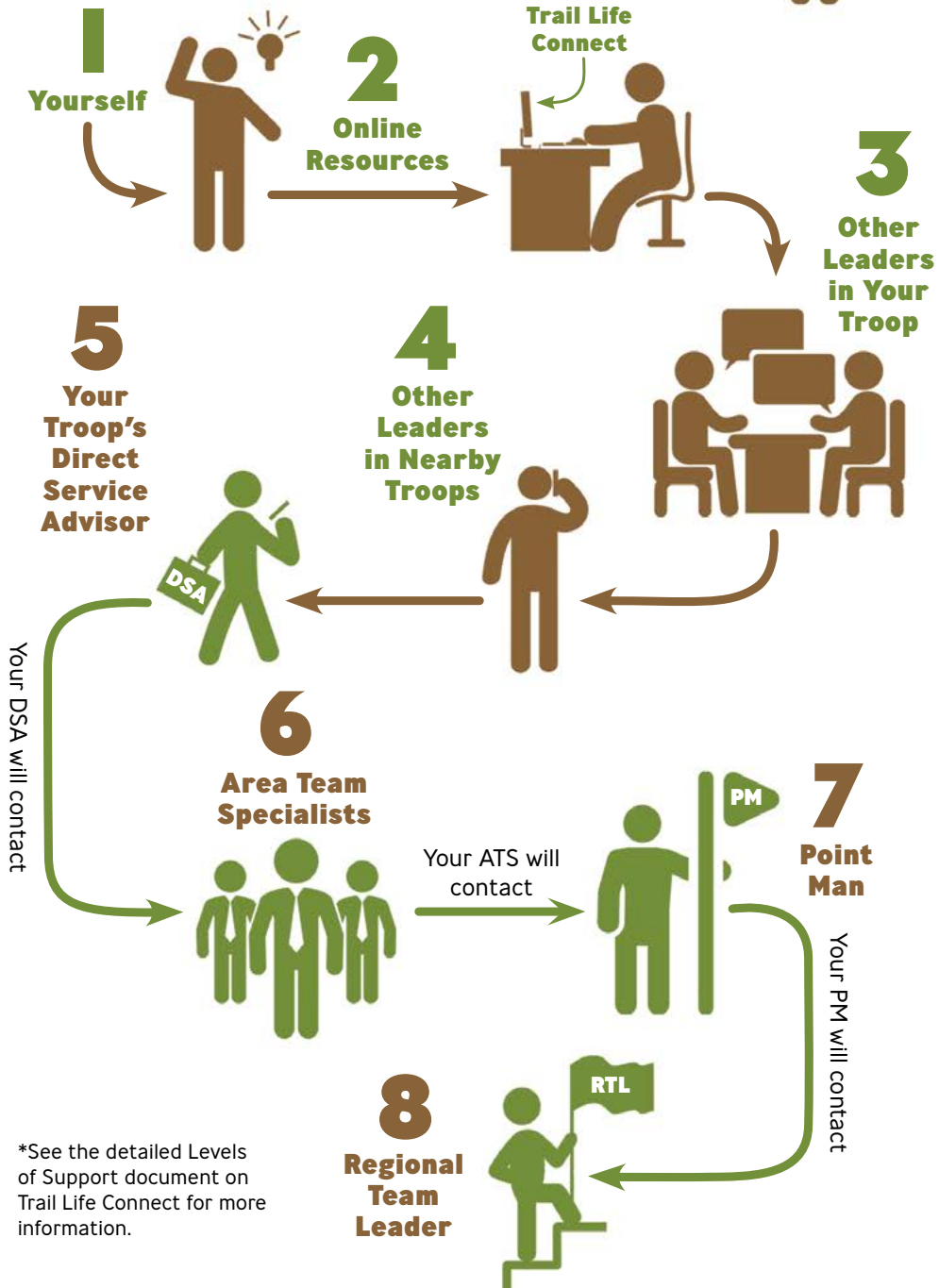
Name _____ Phone _____

Position _____ Email _____

Levels of Support

GOT A QUESTION? NEED HELP?

Remember, Trail Life USA is Volunteer-Driven!
Here is a visual reminder of our volunteer support structure.* **ASK:**



*See the detailed Levels of Support document on Trail Life Connect for more information.

If none of the resources listed in the steps above can provide the needed help, your Regional Team Leader will connect with the Home Office and get the information back to you right away.

The Picture Is Not Complete Until You Have All Five!



The Trail Life Planning, Budgeting, Fundraising and Recruiting Guide Series is composed of five parts that will help you plan a great program year.

- 1. The Annual Planning & Budgeting Guide for Troop Committee Members**
- 2. The Patrol Planner for Adult Leaders**
- 3. Officers' Conference Planner**
- 4. The Annual Troop Fundraising Guide**
- 5. The "Join the Trail!" Recruiting Guide**

Look for next years' Planning Guides
in Trail Life Connect.