

THE TRAIL LIFE PLANNING, BUDGETING, FUNDRAISING, AND RECRUITING GUIDE SERIES •

**PART 4**  
**OF 5**



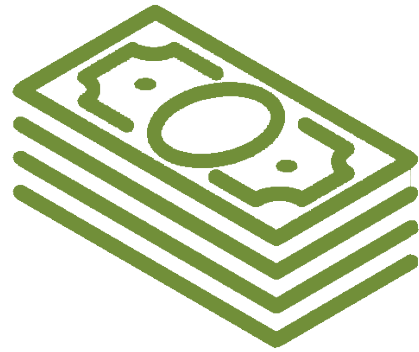
**Trail Life**<sup>®</sup>

ANNUAL  
**Troop**  
**Fundraising**  
**GUIDE**



# WHY FUNDRAISE?

Annual Troop Planning is an essential part of fulfilling the mission of Trail Life USA, and funding it is a vital part of the process. Some Troops are blessed with a Charter Organization that helps them fund their year, but most Troops need to do at least some fundraising. There are many benefits of fundraising, including:



- Increased retention by keeping your promise to new families who expect fun, adventure, and character-building experiences. When people get what they joined for, they stay, they help, they have a great time, and they tell their friends.

**Watch a short story about how the right fundraising strategy transformed a Troop at <http://bit.ly/2NYujWj> or scan the QR code.**



- Trailmen learn responsibility by participating in the planning of their program and then assisting in paying for it through fundraising.
- Setting a goal and reaching it builds perseverance, teamwork, and a sense of accomplishment.
- It gives each Trailman's friends and family a way to easily support him and his Troop.
- It promotes your Troop and Charter Organization's activities in your community.
- It teaches Trailmen good communication and customer service skills.
- It builds self-confidence.

You may have heard the old adage, "Failing to plan is planning to fail." It's true! Unproven fundraising techniques with no plan will not work. The following method of product-selling is simple, straightforward, and proven. Implementing this step-by-step process will yield the results your Troop needs. However, you cannot carry out the plan until Parts 1 and 2 of "Annual Troop Planning" have been completed. This includes the Annual Planning "Dream" session and Patrol Planning. Fundraising is connected to those key parts of the process.

# Steps to Fund Your Year

## STEP ONE:

Select your two Fundraising Chairmen, and determine your fundraising plan.  
(See pages 6-8)

## STEP TWO:

Promote, prepare, and hold your "Sales Kickoff Extravaganza!"  
(See pages 9-11)

## STEP THREE:

Coordinate your High-Energy Sales Campaign.  
(See page 12)

## STEP FOUR:

Order and Deliver your product and wrap up the sale.  
(See page 13)

**The more of these recommendations you follow, the better you'll do.**






For example, if you decide "Since our families are really busy, we'll combine the Sales Kickoff with a regular Troop Meeting," this will significantly reduce your sales.





## Keeping Trailmen focused with weekly updates is key!

### The most successful pilot Troops had these things in common:

-  **They followed the best practices** outlined in this fundraising guide. Not all pilot Troops followed all the steps, but the more they stuck to the proven plan, the better they did.
-  **They kept morale and encouragement high during their sale** by posting sales progress totals at Troop meetings and recognizing the week's top sellers. They also sent additional sales tips mid-stream.
-  **They created special fun incentives** like throwing water balloons (or a pie-in-the-face) at the Troopmaster for all boys who sold any items the first week.
-  **They offered weekly prizes that anyone could achieve** including snacks, cupcakes, and a variety of trinkets for all who sold anything that week; plus gift cards and larger prizes for weekly high-achievers (a flashlight, a survival kit, RC cars, a camera).
-  **They sent weekly communications** emails recognizing individual Trailmen's efforts and reminders of upcoming key dates.

For additional tips, go to the video at  
<http://bit.ly/2EYF9aG>  
or scan the QR code.



# FUNDRAISING FEEDBACK



Here are some tips from Troops across the country. By following a few basic strategies, Troops raised more money than they ever had before. Here's what a few of the "Best Fundraising Practices" pilot Troops said about their product sale:

"Start earlier, keep the sale short (like 4 weeks rather than 6), and offer a variety of small prizes every week. We sold over \$12,000."

**-Idaho Troop**

"Preparation and organization makes a huge difference. Our fundraiser was too rushed—we can definitely do better next year. We should have sent more reminders throughout the sale! Only 22 Trailmen (about a third of our Troop families) sold. But we still sold \$28,510!"

**-Texas Troop**

"Only 8 youth sold, but we achieved over \$7,400 in sales!"

**-California Troop**

"We didn't achieve our "dream session" goal, but selling the amount we did with just 13 Trailmen was an answer to prayer. The previous year, our Troop held 3 fundraisers AND asked for dues—to bring in 20% less income!"

**-Ohio Troop**

"Get some of the product you intend to sell beforehand—let the boys and parents see it, feel it, and understand how it works—that helped us so much. We sold more than \$50,000 and kept well over \$20,000 in profit. We would love to help other Troops be successful, too."

**-New Mexico Troop**

## SUMMARY

On average, pilot Troops sold for 5.5 weeks, grossing about \$14,000 in sales (keeping 40-50% of that as net profit)—totaling about \$600 per Trailman selling.

# STEP ONE



## Determine Fundraising Chairmen and Fundraising Plan

### I. SELECT FUNDRAISING CO-CHAIRS

Select two fundraising co-chairs: one for promotion (a high-energy, up-front, fun, sales type personality) and another for record-keeping (a detailed/accountant type – possibly your current Troop Treasurer). These people have opposite skill sets and personality traits, but both are important. Clearly understand and prepare for who will do what based on the rest of this guide.

**Fundraising Promotion Chair**

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**Fundraising Record-Keeping Chair**

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### 2. KNOW YOUR SALES GOAL

Know the Troop Sales Goal based on the budget prepared in Part I of Annual Troop Planning. Determine each family's goal by dividing by the number of active Trailmen in the Troop.

**Troop Sales Goal**

\$ \_\_\_\_\_

**Each Trailman's Sales Goal**

\$ \_\_\_\_\_

### 3. DETERMINE PRODUCT TO BE SOLD

Determine what product you will sell. Look online and on dedicated Trail Life USA pages or the TLUSA Official Facebook Forum for vendors.

**Consider the following:**

- a. Profit Margin (how much you will make on the sale of each product) ... it should be around 50%.
- b. Price Point (how much you have to sell the item for; a \$15-30 item or package is recommended because people generally buy one item when asked)
- c. Is the product something Trailmen will be motivated to sell?
- d. Does the vendor offer additional prizes for achieving a sales level?
- e. Do you have to pay before the sale starts for product inventory?

### 4. DETERMINE PAYMENT METHODS

Determine what payment methods you will accept:

- Cash     Check
- Credit cards - Square or Paypal
- Transfer programs - Zelle or Venmo.

Prepare as needed. See instructions on setting up a Square account in Trail Life Connect "Resources" section using keyword: "square".

## 5. DETERMINE YOUR DONATION POLICY

Determine a Fundraising donation policy. Donations are often offered in lieu of an order during a fundraiser. You should check with your Charter Organization about their policy and procedures. TLUSA's policy is you cannot solicit (ask for) cash donations during your fundraiser; however, you can accept donations offered freely. If allowed, determine how this should be tracked on the order form or otherwise and when these should be turned in (i.e. immediately, with order, or with money). Donations belong to the Troop, not to individual Trailmen.

## 6. DETERMINE DATE OF KICKOFF "EXTRAVAGANZA"

Determine the date of your Sales Kickoff "Extravaganza" - this is the date the sale starts. This must be a standalone event, not an "add-on" to a Troop meeting.

**Kickoff Date** \_\_\_\_\_

## 7. DETERMINE LENGTH OF SALE

Determine how long your Troop will sell. Five to six weeks is recommended.

**Last Sale Date** \_\_\_\_\_

**Orders Due On** \_\_\_\_\_

## 8. ESTIMATE DELIVERY WEEK

Estimate order delivery week (when the ordered products will arrive) so Trailmen can communicate that to buyers, and families can prepare to deliver orders right away.

**Estimated Order Delivery Week:**

\_\_\_\_\_

## 9. DETERMINE INCENTIVES

Determine and purchase lots of small -- and a few BIG -- sales prizes. Consider vendor incentives (offered by some) and Trailmen preferences. This should include weekly top seller incentives to provide promotion opportunities and competition during the sale. It may also

include cumulative sales incentives or prizes for "best sales tip of the week." Make sure it is very clear and easy to explain and understand. Consider creating a flyer with the incentives.

**(Use the Incentives Chart on page 7 to record your plan.)**

**NOTE:** You cannot create "individual accounts" where a Trailman keeps a percentage of his sales. "Reach a sales level and earn a prize" is fine, but "earn commission" is not! This fundraiser is for the benefit of the TEAM, the Troop as a whole.

## 10. DETERMINE WRAP-UP INCENTIVE

Determine the wrap-up incentive (for example, an ice cream or pizza party) and date if Troop Sales Goal is met.

**"We Hit Our Goal!" Party Date** \_\_\_\_\_

## II. PREPARE A SALES GOAL THERMOMETER

Prepare a large thermometer drawn on a poster with intermittent sales goals marked along the side. Post it where your Troop assembles each week. Every week you will color up to the total amount Trailmen have sold toward reaching the Troop Sales Goal at the top. Boys and their families respond to an easy-to-understand visual like this.



# INCENTIVES CHART

**Week**

**Do This:**

**Earn:**

1	Sell 1 Item	Cupcake
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EXAMPLE

1	_____	_____
	_____	_____
	_____	_____

2	_____	_____
	_____	_____
	_____	_____

3	_____	_____
	_____	_____
	_____	_____

4	_____	_____
	_____	_____
	_____	_____

5	_____	_____
	_____	_____
	_____	_____

6	_____	_____
	_____	_____
	_____	_____

## **Cumulative:**

**Top Seller** \_\_\_\_\_

**2nd Highest** \_\_\_\_\_

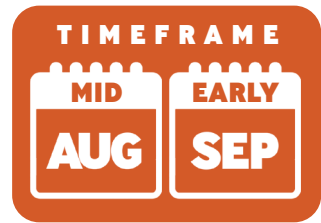
**3rd Highest** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



# STEP TWO



## Promote, Prepare, and Hold Your Sales Kickoff Extravaganza!

### I. PROMOTE YOUR KICKOFF EXTRAVAGANZA

Promote your upcoming Fundraising Kickoff Extravaganza! through Troop newsletters, emails, Trail Life Connect Announcement, Troop Facebook page, and at every Troop meeting or gathering.

Who \_\_\_\_\_

### 2. PREPARE FOR THE EXTRAVAGANZA

a. Determine decorations needed. Make it fun!

Who \_\_\_\_\_

b. Determine snacks to provide.

Who \_\_\_\_\_

c. Determine music needed. Make it high energy!

Who \_\_\_\_\_

d. Finalize Agenda. Keep it as short as possible; 30 minutes is recommended.

Who \_\_\_\_\_

e. Determine # of small prizes to buy (see suggestions provided).

Who \_\_\_\_\_

f. Print Parent Info Flyers and obtain pens.

Who \_\_\_\_\_

### 3. HOLD YOUR FUNDRAISING KICKOFF EXTRAVAGANZA!

- Decorate to set the mood—use colorful wall hangings, streamers, balloons, popcorn, and upbeat music. It needs to be a big party! Boys will start selling the next day—or even tonight. They need to be excited!

- Hand out a Parent Info Flyer and a pen as families arrive. This can be found at TrailLife-Connect.com, or you can use your smart phone to **scan the QR code to the right.**



Parents will follow along and fill in the blanks during the meeting.

# KICKOFF AGENDA



## I. MAKE IT FUN!

Provide fun and energy from the start!

Your Promotions Chairman bursts into the room with cool prizes in hand, tossing out noisemakers (seriously, go to the Dollar Store—you'll earn it all back). This has to be much different than your normal Troop meeting!

He tells everyone the reason for this gathering: "Tonight, we are going to learn how to sell so much \_\_\_\_\_ (product name) that we'll be able to do ALL of the amazing activities we have planned this year—and your parents won't have to PAY for it! Pay close attention: we'll be giving away fun prizes for answering questions correctly at the end!"

This will keep people involved and listening. Have 10 or 12 small (\$!) prizes ready (candy bars, Matchbox cars, etc.).

## 2. ANNOUNCE SALES INCENTIVES

Announce sales incentives that anyone can achieve.

For example: "At next week's Troop meeting, anyone who has sold even ONE item gets to toss a pie in the Troopmaster's face!"

## 3. ANNOUNCE CUMULATIVE INCENTIVES

Announce other weekly and cumulative incentives Trailmen may earn for reaching higher sales levels.

## 4. ANNOUNCE TROOP GOAL INCENTIVES

Announce a planned pizza or ice cream party if the Troop Sales Goal is achieved! Reveal your big thermometer Troop Sales Goal poster and announce how every week you will color up to the total amount they have sold—"We have to hit the top to get this party!"

## 5. SALES TRAINING

Do the following during this Kickoff meeting—later, train any new Trailmen as they join through your recruiting efforts.

### Recordkeeping Chair talks about: **The Basics**

#### Reinforce Why We Sell!

- "Doing this faithfully for the next 5-6 weeks will pay for your entire year of fun and adventure, benefit the whole Troop, and avoid extra fees or out-of-pocket expenses for parents! There are side benefits, too. Your son will learn to develop a plan, persevere, overcome objections, achieve a goal, learn teamwork, earn his own way, and become self-confident."
- Pass out sales forms to Trailmen and parents, too.
- Describe how the sales form is laid out and what info has to be filled in.
- Explain processes of handling cash, accepting checks, and, if applicable, credit cards or transfer programs (using Square, Paypal, Venmo, Zelle, etc.)
- Describe your policy regarding donations offered in lieu of an order.
- Discuss Troop's procedures for taking and reporting orders.
- Sales tracking and any weekly reporting requirements for families
- Ordering product: Troop will place one order for the whole Troop; the Recordkeeping Chair will be the only person communicating with the product vendor.
- Review key dates.
- Communicate that parents will pay for the difference between the Trailman Sales Goal and what he actually sells. Families who don't sell are responsible to pay for the full amount per Trailman.

Promotions Chair talks about:  
**Sales goals per Trailman and how they can achieve them.**

**How to Sell:**

- DO: Go door-to-door. Wear your uniform. Practice your approach. Smile. Hand customer the product sheet and a pen. Say the 7 key words:

**“Will you help me earn my way?”**

- DO: Be prepared for questions. Know your products. Know what the money you raise will be used for.
- DO: Say “Thank you.” Always! Even if someone doesn’t make a purchase.
- DO: Seek online orders, too!  
 Here’s how: Make a list of ALL of your relatives and friends and send each of them a list of products or send them to the online “store” (if using Square, see instructions in resources on TrailLifeConnect.com).
- DON’T: Forget to sell at Mom’s or Dad’s workplace!
- DON’T: Sell alone! It’s fun going door-to-door with a buddy system of three.

**6. PROMOTIONS CHAIR FINISHES OUT THE MEETING**

“EVERYONE GOT IT?” Allow two minutes for questions.

**7. REWARD LISTENERS**

Now reward those who were listening with prizes! Think of (beforehand) 10 or more easy questions and start throwing out candy and prizes. Sample Question: “How many items do you need to sell this week to pie Mr. \_\_\_\_\_ in the face at next week’s Troop meeting?”

Answer: “ONE!” Yes – toss that kid a prize! Repeat, with easy questions.

**Send them out:** “Now go start selling!”

**FOOT NOTES:**




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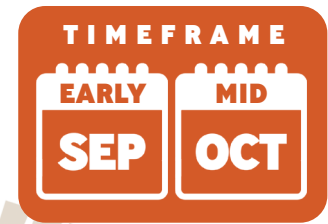
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# STEP THREE



## Execute Your High-Energy Sales Campaign

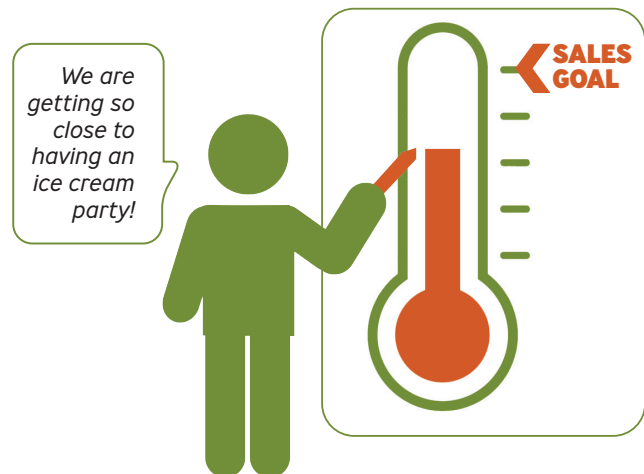
Keep the intensity high! You can encourage and inspire them TWICE each week during the sale via your preferred digital delivery method (i.e. email or Facebook); just make sure it gets to EVERYBODY.

### 1. Weekly announcements should include:

- Promoting participation, sales training tips and reminders, and success stories.
- Reminders for parents of key dates throughout the campaign including the date orders are due.
- Reminders to parents of the difference their son's sales will make in the life of the Troop; for instance, how it pays for upcoming trips, equipment, adventures, and how it helps parents pay little or nothing out-of-pocket.
- Sales updates (provide prize rewards at Troop meetings each week).
- Recognition of top achievers in your email, AND announce their names at the Troop meeting — not just who has sold the most total so far, but also who has sold the most this week. Think of categories at which multiple Trailmen can "win" — reward them (by simply mentioning their names) for effort: most hours spent, most contacts made online, most houses visited, etc.
- Communicate that time is short: "Only \_\_\_ weeks to go!"
- Share sales success stories you have heard, or choose one Trailman or his parent to share something he tried that led to more sales.

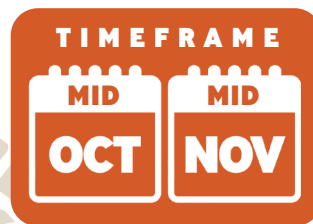
**2. At the Troop meeting:** Color in your "sales thermometer"—make it dramatic, slowly coloring upward with your marker while the Trailmen provide the drumroll! Challenge them to achieve the next % or \$ level by next week. Add some special incentive to make them want to reach it by next week's meeting.

Make it dramatic...everyone can provide the "drumroll" as you are coloring...do it every week.



All of the above should be done both in the weekly written communication AND at the Troop meeting. Why TWICE? Because different people will read an email or a post (mostly parents), while others (youth) will listen better in the meeting (and those who sold will be excited to impress their peers)! These are guaranteed sales-enhancers. Get the word out TWICE a week!

# STEP FOUR



## Order Then Deliver Your Product and Wrap Up the Sale

### 1. COLLECT ORDER FORMS

Recordkeeping Chairman collects all order forms on the designated date from all Trailmen, organizes the information, totals it all up, and places the order with the vendor.

### 2. ANNOUNCE SALES TOTAL

Promotion Chairman announces sales total at next meeting and if the Troop Sales Goal was met – also, when and where the order will be available for pick-up.

### 3. ANNOUNCE CELEBRATION PARTY

If you hit your Troop Sales Goal, arrange for and announce the celebration party. Way to go, TEAM!!!

### 4. ORGANIZE THE ORDERS

When your product arrives, the Recordkeeping Chairman and other volunteers organize the orders and distribute product to Trailmen based on order sheets. Give Trailmen a copy of their order form and keep one for the Troop's records.

### 5. DOUBLE-CHECK ORDER

Double-check each order for accuracy as the product is transferred to Trailmen. Consider having a "packing list" showing the quantity of each product the Trailman receives, and have the Trailman's parent check it and sign your copy.

### 6. DELIVER ORDERS (SAME DAY!)

Trailmen immediately go out and deliver the product and collect all money. Remind them that the same rules for selling apply to de-

livering the product: Smile, say "Thank you," and don't go alone.

### 7. COMMUNICATE MONEY TURN-IN PROCESS

Communicate when and where collected money is to be turned in, and how (usually one check per family, made out to the Troop, works best).

### 8. TURN IN COLLECTED MONEY

Trailmen turn in all money (including donations) to the Recordkeeping Chairman.

### 9. SEND MONEY TO PRODUCT VENDOR

Recordkeeping Chairman remits the amount due to product vendor.

## ADDITIONAL RESOURCES:

Additional RESOURCES are available – in Trail Life Connect and at the link below. Tip: Ask for other Troop's fundraising tips and success stories in The Campfire on Trail Life Connect!

Short video tutorials can be found at <http://bit.ly/390UoOr> or scan the QR code with your phone.



Watching the videos, picking up additional tips, and learning from others' success stories WILL increase your sales.

# FOOT NOTES:

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**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!***

# 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 Adventure!" Recruiting Guide**

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

# Youth Protection Essentials

It's as Simple as 1-2-3

## No 1-on-One

The no one-on-one rule is in place for youth protection so no boy is ever alone with an adult. This is for both the protection of the boy and the adult.



## 2-Deep Leadership

The two-deep rule is in place for safety so there is always a minimum of two Registered Adults in proximity to provide backup and oversight.



## Buddy System of 3

The buddy system of three helps keep youth safe from abusive youth when out of sight of adult leadership. Buddies must be of the same program level.



Complete Child Safety Youth Protection policies and additional guidelines are found in the current version of the Health and Safety Guide.



**Trail Life**

Adventure › Character › Leadership

[TrailLifeUSA.com](http://TrailLifeUSA.com)