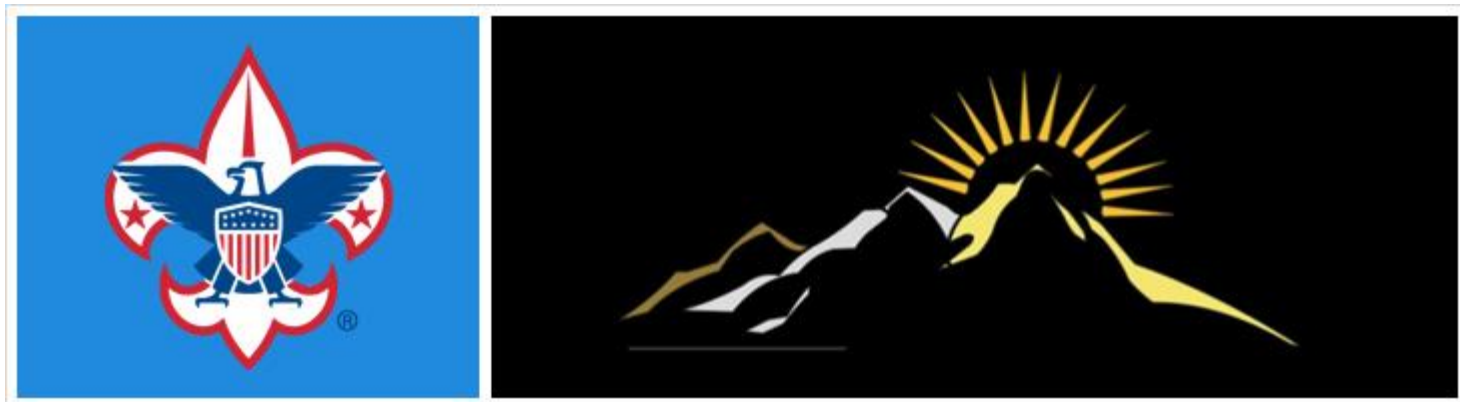


Journey to Excellence

"The BSA method for annual planning and continuous improvement"



JTE Guidebook for Scout, BSA Troops A Tool to Help Your Troop and You Thrive

2022 Program Year

This guidebook was prepared as an assist to Scout, BSA troop leaders and others in using Journey to Excellence tools to plan and deliver excellent Scouting through their Scout troops. More material is available on the National Council JTE Resources webpage.

Strategic Development Office-National Council-Boy Scouts of America
Questions? Contact Your Local Council

Revised 10-12-2022

JTE Guidebook for Scout, BSA Troops-A Tool to Help your Troop and You Thrive

How to use this Guidebook

This guidebook was created with busy troop leadership in mind. It is intended to help the troop key 3, the committee chair, the Scoutmaster and the chartered organization representative in using the **Journey to Excellence (JTE)** concept as a unit planning tool and year-round checklist of meaningful activities for the scouts. This guidebook was made from various publications and documents available from the National Council website and then instructions on how to use them. Journey to Excellence uses and blends many existing BSA programs, some of which the unit leadership may not be familiar with. The material in this guidebook should answer what these programs are. The information in the guidebook should enable the troop committee to conduct a troop planning session that prepares the pack for a very successful year of fun.

This Guidebook consists of (in order)

- A summary sheet used to show responsible adults for each of the 11 JTE objectives
- The 2022 JTE Scorecard that show JTE measures and levels
- The 2022 JTE Tracking Workbook/Spreadsheet to use as a planning checklist
- Text describing a suggested order of objectives to follow in building your troop calendar
 - Planning the program year
 - Patrol method
 - Campouts
 - Camp
 - Leadership and family engagement
 - Trained leadership
- Scouts BSA Troop Leader Position Trained Requirements-latest revision
 - Service projects
 - Membership
 - Webelos to Scouts
 - Budget
 - Advancement
 - Retention
- Progress Record Sheets for:
 - Scouter's Training Award for Scouts, BSA-latest revision
 - Scoutmaster's Key-latest revision
- Instructions for the Unit Leader Award of Merit
 - Troop budgeting information

Leader Training

Leader training and recognition is extensively discussed in this guidebook and mentioned here. Providing leadership for Journey to Excellence objectives is an important part of earning adult recognitions. Please use the following summary sheet as a tool to guide the troop adults in helping the troop be the best troop it can be.

Scout, BSA Troop Journey to Excellence Planning 2022-Summary Sheet

Troop _____

District _____

JTE Overall Goal

- Bronze
- Silver
- Gold

This table lists all 11 JTE objectives in the order presented in the guidebook. For each objective list the responsible adult, the date they started working on their **Scouter's Training Award for Scouts, BSA** and circle the JTE goal the Scouter is helping the troop achieve

Troop Scoresheet Objective	#	Responsible Adult	Scouter's Training Award for Scout, BSA-Start date	Goal
Planning and budget (*planning)	1			B S G
Patrol method	9			B S G
Campouts	6			B S G
Camp	7			B S G
Leadership and family engagement	11			B S G
Trained leadership	10			B S G
Service projects	8			B S G
Membership	2			B S G
Webelos to Scouts	4			B S G
Planning and budget (*budget)	1			B S G
Advancement	5			B S G
Retention	3			B S G

Reviewed by the Troop Committee on _____

Committee Chair

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Troop _____ of _____ District
2022 Scouting's Journey to Excellence
"The BSA method for annual planning and continuous improvement"

Item	Objective	Bronze Level	Silver Level	Gold Level	Bronze Points	Silver Points	Gold Points
Planning and Budget					Total Points:		200
#1	Planning and budget: Will have a program plan and budget that is regularly reviewed by the committee, following BSA policies related to fundraising. (Virtual/remote meetings are acceptable.)	Will have an annual program plan and budget adopted by the troop committee.	Will achieve Bronze, plus troop will conduct planning meeting involving youth leaders for following program year.	Will achieve Silver, plus troop committee will meet at least six times during the year to review program plans and finances.	50	100	200
Membership					Total Points:		500
#2	Building Scouting: Will recruit new youth into the troop in order to grow membership.	Will have membership growth plan that includes a recruitment activity or will use a personalized invitation method and have current pin on beascout.org.	Will achieve Bronze, and either will increase youth members or will have at least 25 members.	Will achieve Silver, and either will increase youth members by 5% or will have at least 35 members.	50	100	200
#3	Retention: Will retain a significant percentage of youth members.	Will reregister 75% of eligible members.	Will reregister 80% of eligible members.	Will reregister 85% of eligible members.	50	100	200
#4	Webelos-to-Scout transition: Will have an effective plan to recruit Webelos Scouts into the troop.	With a pack or Webelos den, will hold two joint activities (live or virtual).	Will achieve Bronze, plus will recruit two Webelos Scouts.	Will achieve Bronze, plus will provide at least one den chief to a pack and will recruit five Webelos Scouts.	25	50	100
Program					Total Points:		900
#5	Advancement: Will achieve a high percentage of Scouts earning rank advancements.	40% of Scouts will advance one rank during the year.	50% of Scouts will advance one rank during the year.	60% of Scouts will advance one rank during the year.	50	100	200
#6	Short-term camping: Will conduct short-term or weekend campouts throughout the year. (Alternative home-centered approaches may be used.)	Will conduct four short-term overnight campouts.	Will conduct seven short-term overnight campouts.	Will conduct nine short-term overnight campouts.	50	100	200
#7	Long-term camping: Will participate in long-term camp with a majority of troop in attendance. (includes council-offered alternatives)	Troop will participate in a long-term camp.	60% of Scouts will attend a long-term camp.	70% of Scouts will attend a long-term camp.	50	100	200
#8	Service projects: Will participate in service projects, with at least one benefiting the chartered organization. (includes home engagements serving others). Will record service hours	Will participate in three service projects and enter hours on Scoutbook/Internet Advancement.	Will participate in four service projects and enter hours on Scoutbook/Internet Advancement.	Will participate in five service projects and enter hours on the Scoutbook/Internet Advancement.	25	50	100
#9	Patrol method: Will use the patrol method to develop youth leaders. (Virtual/remote meetings are acceptable.)	The troop will have patrols, and each will have a patrol leader. There will be an SPL, if more than one patrol. The PLC will meet at least four times a year.	Will achieve Bronze, plus PLC will meet at least six times. The troop will conduct patrol leader training.	Will achieve Silver, plus PLC will meet at least ten times. At least one Scout will have attended an advanced training course, like NYLT or Order of the Arrow Conference.	50	100	200
Volunteer Leadership					Total Points:		400
#10	Leadership and family engagement: The troop will be proactive in recruiting sufficient leaders and will communicate regularly with parents. (Virtual/remote parents' meetings are acceptable.)	Will have at least one registered assistant Scoutmaster.	Will achieve Bronze, plus the troop will hold two courts of honor, where troop plans are reviewed with parents.	Will achieve Bronze, plus troop will hold three courts of honor, where troop plans are reviewed with parents. Will recruit at least one new leader	50	100	200
#11	Trained leadership: Will have trained and engaged leaders at all levels. All leaders are required to have youth protection training. (Online/remote training is acceptable except for Introduction to Outdoor Leader Skills.)	Scoutmaster or an assistant Scoutmaster will have completed position-specific training.	Will achieve Bronze, plus the Scoutmaster and 60% of assistants will have completed position-specific training or, if new, will complete within three months of joining.	Will achieve Silver, plus two-thirds of active committee members will have completed position-specific training and at least one person will have attended an advanced training course involving a total of at least five days.	50	100	200

- Bronze:** Earn at least 525 points by earning points in at least 7 objectives. **Total points earned:** _____
- Silver:** Earn at least 750 points by earning points in at least 8 objectives.
- Gold:** Earn at least 1,000 points by earning points in at least 8 objective and at least Bronze in #6 or #7. **No. of objectives with points:** _____
- Our troop has completed online rechartering by the deadline in order to maintain continuity of our program.
- We certify that these requirements have been completed:
- Scoutmaster _____ Date _____
- Committee chair _____ Date _____
- Commissioner _____ Date _____

This form should be submitted to the Scout service center or your unit commissioner, as directed by your council.

Scouting's Journey to Excellence

2022 Troop Planning, Performance, and Recognition

Journey to Excellence uses a balanced approach to measure performance. It guides program planning before the year begins, monitors activities for continuous improvement during the year, and recognizes performance at the end of the year. In planning your strategy, use actual numbers from the previous year to guide your performance improvement goal planning. The period for measuring performance will be the calendar year.

Planning and Budget Measures	
1	The troop will have program plan and budget reviewed at all troop committee meetings. Troop will follow BSA policies relating to fundraising and fiscal management as found on Unit Money-Earning Application form and any other publication that the council has developed for fundraising and fiscal management. A meeting will be held with youth leaders where they are involved in developing plan for next program year. The troop's program plan should be shared with unit commissioner. Separate troops for males and females under the same chartered organization may have a shared unit committee. Committee meetings may be held remotely.
Membership Measures	
2	The troop will have growth plan to serve diversity of our community and will conduct formal recruiting event. On December 31, 2022, the troop will have an increase in number of youth members as compared to the number registered on December 31, 2021. A membership growth plan template can be found at www.scouting.org/membership . The troop has an up-to-date pin on the "Be a Scout" website. Given current challenges, holding formal recruiting events may not be possible. Bronze may be achieved by developing and implementing a recruiting plan involving direct personal invitations for youth to join.
3	Number of youth members on most recent charter renewal (A) divided by number of youth registered at end of prior charter year (B) plus all new youth joining (C) minus any ageouts (D). Total = $(A) / (B+C-D)$. Age-outs are youth too old to reregister as Scouts. Compare membership at 2022 reregistration with membership at 2021 reregistration. For December charter expiration, use Jan, 2023 and Jan, 2022 recharter.
4	Will hold at least two activities with a pack or Webelos den, and will recruit new Webelos Scouts into the troop. Den chiefs will be provided to one or more Cub Scout dens. Virtual gatherings are acceptable.
Program Measures	
5	Total number of Scouts advancing at least one rank (Scout, Tenderfoot, Second Class, First Class, Star, Life, Eagle) during the calendar year (A), divided by the number of youth registered at the end of the year (B). Advancement = $(A) / (B)$. The troop is strongly encouraged to use Scoutbook to track each individual's advancements.
6	Will conduct short-term (at least one overnight) campouts throughout the year.
7	Number of Scouts who attend any in-council or out-of-council long-term summer camp (of at least five nights), high-adventure experience, or jamboree, or serve on camp staff within the past year, divided by the Scout membership on June 30, 2022. Youth attending long-term specialty camps such as NYLT or STEM are also counted. Alternatives that spread the camping nights over multiple experiences may be included. Virtual alternatives are acceptable. These include virtual camping programs and other remote activities.
8	The troop will participate in service projects during the year and enter them on the internet advancement website or through Scoutbook. The projects may be completed as joint projects with other organizations. At least one project must benefit the chartered organization. Service projects may include home-centered efforts providing they serve others outside the home.
9	The troop is separated into patrols and each patrol has an elected patrol leader. If the troop has more than one patrol, there is an elected senior patrol leader. If the troop has more than one patrol, the PLC will meet at least four times each year. The troop will hold patrol leader training each year, and youth will have the opportunity to participate in advanced training. PLC meetings may be held remotely.
Volunteer Leadership Measures	
10	The troop will have Scoutmaster, ASM, and committee of at least three members. Ideally, chartered organization representative should not be dual registered as one of the committee members. Separate troops for males and females with same chartered organization may have shared unit committee. Troop will conduct courts of honor where youth are recognized and program plans shared with parents. Courts of honor may be done remotely. Ideally, "new" leader has never been registered before, but at least must not have been registered within past three years.
11	All leaders have completed youth protection training. Scoutmaster and 60% of the assistants will have completed position-specific training or, if new, will complete within three months of joining. Two-thirds of active committee members (including chartered organization representative) will have completed position-specific training. For Gold, one leader must have attended an advanced training course involving a total of 5 days or more, such as Wood Badge, Summit or Philmont Training Center, at some point in their Scouting tenure.

Scoring the troop's performance: To determine the troop's performance level, you will use the above information to determine the points earned for each of the 11 criteria and then add those individual point scores to determine a composite score. Count only the highest point total achieved in any one criterion. Bronze level requires earning at least 525 points in at least 7 criteria, Silver level requires earning points in at least 8 criteria and 750 points, and Gold level requires earning points in at least 8 criteria, meeting at least bronze standards in either short-term or long-term camping, and earning at least 1,000 total points.

For more resources including workbooks and planning guides: www.Scouting.org/jte



2022 Scouts BSA Troop Journey to Excellence Tracking Workbook/Spreadsheet

https://www.scouting.org/wp-content/uploads/2022/09/2022-JTE-Troop-Spreadsheet-Protected-Rev-2022-08-14.xlsx

Item No.	Objective	Parameter	User Input	Calculated Values	Bronze Points	Silver Points	Gold Points
Planning and Budget							
1	Planning and budget: Will have a program plan and budget that is regularly reviewed by the committee, and it follows BSA policies related to fundraising. (Virtual/remote meetings are acceptable.)	Date: Troop committee adopted annual program plan & budget _____ Date: Planning meeting involving youth leaders _____ Date: Committee meeting #1 _____ Date: Committee meeting #2 _____ Date: Committee meeting #3 _____ Date: Committee meeting #4 _____ Date: Committee meeting #5 _____ Date: Committee meeting #6 _____ Count: Total number of committee meetings _____	_____	0			
Membership							
2	Building Scouting: Will recruit new youth into the troop in order to grow membership.	Check if any formal transfers in or out of your Unit (Except Webelos Scouts coming in) <input type="checkbox"/> Date: Troop recruitment activity or personalized invitation _____ Count: Number of Scouts registered at start of this year's charter (1/1/1899) _____ Less: Youth 18 years or older by end of charter year (age-outs) _____ Plus: New Scouts joining during the charter year (not AoLs) _____ Plus: Webelos/AoLs transfers from packs during the year _____ Count: Number of Scouts registered at end of this year's charter (1/0/1900) _____ Count: Number of Scouts to be registered at the start of next year's charter (1/1/1900) including new applications submitted with charter renewal _____ Percent: Growth over end of prior year _____ BeAScout Pin Current <input type="checkbox"/> Yes	<input type="checkbox"/> A _____ C _____ D _____ E _____ G 0 H _____	0.0%			
3	Retention: Will retain a significant percentage of youth members.	Count: Number of Scouts to be registered at start of next year's charter (1/1/1900) _____ Count: Number of NEW applications submitted with next year's charter _____ Count: Youth eligible to reregister _____ Percent: Retention rate _____	H _____ J _____ K _____	0.0%			
4	Webelos-to-Scout transition: Will have an effective plan to recruit Webelos Scouts into the troop.	Date: Joint activity with a pack or Webelos den #1 (Live or virtual) _____ Date: Joint activity with a pack or Webelos den #2 (Live or virtual) _____ Count: Webelos/AoLs joining the troop during the year _____ Count: Number of Scouts from the troop serving as den chiefs _____	_____	0			
Program							
5	Advancement: Will achieve a high percentage of Scouts earning rank advancements.	Count: Current membership as of 12/31/2022 _____ Count: Scouts advancing one or more ranks during the year _____ Percent: Advancement rate _____	_____	0.0%			
6	Short-term camping: Will conduct short-term or weekend campouts throughout the year. (Alternative home-centered approaches may be used.)	Date: Overnight campout #1 _____ Date: Overnight campout #2 _____ Date: Overnight campout #3 _____ Date: Overnight campout #4 _____ Date: Overnight campout #5 _____ Date: Overnight campout #6 _____ Date: Overnight campout #7 _____ Date: Overnight campout #8 _____ Date: Overnight campout #9 _____ Count: Total number of overnight campouts _____	_____	0			
7	Long-term camping: Will participate in long-term camp with a majority of the troop in attendance. (Includes council-offered alternatives.)	Count: Number of Scouts registered on June 30 _____ Count: Number of Scouts attending any long-term camp _____ Percent: Camping rate _____	_____	0.0%			
8	Service projects: Will participate in service projects, with at least one benefiting the chartered organization. (Includes home engagements serving others.) Will record service hours.	Yes/No: Troop records service projects and hours in Internet Advancement <input type="checkbox"/> Yes Yes/No: At least one project benefits the chartered organization <input type="checkbox"/> Yes Date: Service project #1 _____ Date: Service project #2 _____ Date: Service project #3 _____ Date: Service project #4 _____ Date: Service project #5 _____ Count: Total number of service projects _____	_____	0			
9	Patrol method: Will use the patrol method to develop youth leaders. (Virtual/remote meetings are acceptable.)	Yes/No: Troop has a senior patrol leader <input type="checkbox"/> Yes Yes/No: Troop conducts patrol leader training <input type="checkbox"/> Yes Yes/No: At least 1 Scout attended an advanced training course <input type="checkbox"/> Yes Count: Number of patrols _____ Count: Number of patrols with patrol leaders _____ Date: Patrol leaders' council meeting #1 _____ Date: Patrol leaders' council meeting #2 _____ Date: Patrol leaders' council meeting #3 _____ Date: Patrol leaders' council meeting #4 _____ Date: Patrol leaders' council meeting #5 _____ Date: Patrol leaders' council meeting #6 _____ Date: Patrol leaders' council meeting #7 _____ Date: Patrol leaders' council meeting #8 _____	_____				

2022 Scouts BSA Troop Journey to Excellence Tracking Workbook/Spreadsheet
<https://www.scouting.org/wp-content/uploads/2022/09/2022-JTE-Troop-Spreadsheet-Protected-Rev-2022-08-14.xlsx>

Item No.	Objective	Parameter	User Input	Calculated Values	Bronze Points	Silver Points	Gold Points
		<i>Date:</i> Patrol leaders' council meeting #9 <i>Date:</i> Patrol leaders' council meeting #10 <i>Count:</i> Total number of patrol leaders' council meetings	_____ _____	0			
Volunteer Leadership							
10	Leadership and family engagement: The troop will be proactive in recruiting sufficient leaders and will communicate regularly with parents. (Virtual/remote parents' meetings are acceptable.)	<i>Yes/No:</i> Registered Scoutmaster <i>Yes/No:</i> Recruited at least one new leader <i>Count:</i> Number assistant Scoutmasters <i>Count:</i> Number of committee members <i>Date:</i> Court of Honor #1 <i>Date:</i> Court of Honor #2 <i>Date:</i> Court of Honor #3 <i>Count:</i> Number of courts of honor	<input type="checkbox"/> Yes <input type="checkbox"/> Yes _____ _____ _____ _____	0			
11	Trained leadership: Will have trained and engaged leaders at all levels. All leaders are required to have youth protection training. (Online/remote training is acceptable, except for Introduction to Outdoor Leader Skills.)	<i>Yes/No:</i> Scoutmaster has completed position-specific training <i>Yes/No:</i> At least one person has attended advanced training <i>Count:</i> Number assistant Scoutmasters <i>Count:</i> Number with position-specific training <i>Percent:</i> Assistant Scoutmasters completing training <i>Count:</i> Number of committee members <i>Count:</i> Number with position-specific training <i>Percent:</i> Committee members completing training	<input type="checkbox"/> Yes <input type="checkbox"/> Yes _____ _____ _____	0 0.0% 0 0.0%			

Bronze: Earn at least 525 points by earning points in at least 7 objectives.

Silver: Earn at least 750 points by earning points in at least 8 objectives.

Gold: Earn at least 1,000 points by earning points in at least 8 objectives and at least bronze in #6 or #7.

Total points earned: 0

No. of objectives with points: 0

Journey to Excellence

A Tool to Help Your Troop and You Thrive!

What is *Journey to Excellence*?

Would you like a tool to help you figure out what activities your troop, your troop committee and you can do to give the best scouting experience to your registered youth?

If so, then reviewing and then using BSA's **Journey to Excellence** is just the tool for you! Journey to Excellence, abbreviated as **JTE**, is a roadmap or a guide or benchmark to show and indicate what a troop should and can do to have a strong scouting program. JTE can help answer questions like how many and what type of meetings should the troop have? How trained should the adults be? What outdoor activities should the troop do? How does a troop budget?

Read on and discover how JTE can HELP!

First of all, any scout unit should have a regular **planning process**. There must be a way for your troop to make future plans for meetings, activities and fundraisers. There are many ways to do this. You can use a big calendar that you provide or download one from the National Council BSA Scouting.org website. You can use a big sheet of paper showing the entire program year or a single sheet per month. It is up to you. The important troop leadership adults must be involved, certainly the unit key 3, the Scoutmaster, the troop committee chair and the chartered organization representative. The troop treasurer as well as the parents responsible for advancement, membership, popcorn sales, summer camp, service projects and the others that provide time and resources for the troop and the youth leaders, the patrol leaders' council (PLC) should be involved. It is up to you how to do a yearly plan; however every unit needs a way to do so. National Council BSA provides many suggestions. they can be found on-line at <https://troopleader.scouting.org/annual-planning-conference/>.

You should also involve your **unit commissioner**, an experienced Scouter dedicated to helping your troop succeed. Let the unit commissioner know when you are going to have your planning session and invite him or her to participate. Helping is their job! Every commissioner should be in contact with unit leadership and ask what they can do to help. Ask at the next roundtable (a district-wide monthly adult leader meeting) if you do not know who your unit commissioner is and get the correct contact information on where to send an invitation to attend the troop's annual planning session. Remember, the Detailed Assessment done by the Unit Commissioner is a great tool to help you plan next year.

You will need a **My.Scouting account** to have full access to the information available to you as a troop leader and resource. Gaining access is simple. Most importantly you need your official National Scouting ID number. It can be found on your annual membership card or from your unit roster provided with your charter kit. Most information is available without an account however there are additional planning benefits if you do.

Some Scouters might have ended up with two or more ID numbers over time. Your district executive can help you combine your IDs if that is the case. Take a few moments, write down the numbers, if you know them, and provide them to your district executive or unit commissioner.

Planning Guidance from JTE

With just a few minutes of reading you can learn about the planning assistance JTE can provide. However, first you need the appropriate **JTE Scorecard**. There is one for every program, Cub Scout **packs**, Scout, BSA **troops**, Varsity Scout **teams**, Venturing **crews** and Sea Scout **ships**. You will find all the scorecards on the Journey to Excellence Resources web page which you can access from My.Scouting.org (*Menu-BSA Web Links-Journey to Excellence Resources*). Scroll to the bottom and you will find the scorecards in a section titled "**Scorecards**" then "**Unit-Updated**". Select the appropriate year, **2022**, and a list of available scorecards will appear. Select the one you want, the **Troop Scorecard**. The scorecard will appear and can be downloaded as a PDF. One is on pages 3 and 4 of this guidebook. You should be able to get additional copies from your unit commissioner, pick one up at roundtable, at the council office or from your district executive. One is included in the unit recharter package. The troop will need one long before recharter time if it is going to be used to help create the troop annual plan.

To begin preparing for the troop planning session review the **JTE Troop Scorecard** included in the guidebook. It is two sided and page one lists 11 areas, called **objectives**, where three measurement levels, Bronze, Silver and Gold, are identified. These three levels can assist you and the troop planning team determining the importance of each individual objective to the troop. Your troop might find that the activities associated with a particular objective are more important than others to you, your sponsoring partner and your troop's youth and so you will make plans accordingly. Ultimately, as the unit grows, you will be able to make plans to accomplish a level in all 11 objectives. Points are assigned for each level obtained and unit point totals provide an overall unit measure of **Bronze**, **Silver** or **Gold**. Every Scout troop should strive to be **Gold**.

Each objective is explained in a short summary on the first page and further information is on the back side or second page. There are objectives for youth membership, advancement, outdoor activities, adult leaders, number of meetings, service projects and unit activities and are further explained in this guidebook.

Read through all the objectives and get a feel for the intent and the difference among the three quality levels where **Bronze** means a unit is *effective*, **Silver** means *excellent* and Gold is the standard for an *exceptional* unit. Please note that each objective has a high-end ceiling or target instead of a more traditional yearly goal consisting of a percentage improvement regardless of the measure. This allows for being at the top, **Gold**, and not needing to improve every year to stay **Gold**. This way you can focus on working on other objectives. There is also a minimum standard a Troop must meet to be **Bronze**. The fixed **Bronze**, **Silver** and **Gold** criteria are known as **Determined Standards**.

Additionally, yearly improvement of a fixed percentage (generally 2%) of an objective not yet Gold and being above the **Bronze** or **Silver** measure qualifies the troop at the next level, the **Silver** or **Gold** measure. This improvement method establishes the **Performance Standard**. None of these 11 objectives will surprise any Scouter with any experience. All the objectives are woven into the operation and program of a Scout troop.

Before the Planning Session Starts

There are a few items to know, collect or do before the troop planning session. Know where the troop is going to meet, obtain school vacation schedules, know the federal and state holiday schedule, find the council and district schedules, discuss with the troop key 3 who to invite, peruse the resource web pages for useful documents (some listed in this guidebook), determine how the troop schedule is going to be shown while it is being planned and have a room big enough for the session itself.

Where to Start? With a Plan of course—Objective # 1

A written plan is an excellent tool to have an active and fun Troop. **Objective # 1, Planning and budget: Have a program plan and budget that is regularly reviewed by the committee, and it follows BSA policies relating to fundraising** provides a road map on what to do. Let's do the program plan first and then the budget once the full plan is put together.

Many planning resources exist on the various BSA National websites and should be reviewed as suggested above. These tools are well thought out and will greatly assist the program plan. Having an annual program plan (and budget) adopted by the troop committee is required for the **Bronze** measure. **Silver** is the measure if the troop involves youth leaders in the planning meeting. If the troop committee meets at least six times during the year and reviews program plans (and the budget) the troop qualifies as **Gold**. Start filling in the troop planning calendar by scheduling and showing these six committee meetings. Put the date of the meeting(s) on the planning calendar.

Download and use the JTE troop tracking workbook/spreadsheet, pages 5 and 6 of this guidebook, as a method to plan and guide the troop to the desired JTE goal. As a start enter the committee meeting dates and learn how this spreadsheet calculates the year end JTE measure, Bronze, Silver, or Gold.

Next continue with the Patrol method - Objective # 9

The next best question to ask in planning a yearly calendar for a Scout troop is "How involved will the Scouts themselves be?" Will the senior patrol leader (SPL), assistant senior patrol leaders (ASPL) and the patrol leaders (PL) be a part of the planning? The recommendation is to have them heavily involved however this may vary from unit to unit. The SPL certainly needs to be a part of any planning event. The next JTE objective to make plans for must be **Objective # 9, Use the Patrol method to develop youth leaders**. Your troop will measure out **Bronze** if you have patrols with patrol leaders and, if more than one patrol, there is senior patrol leader. You also need to have 4 patrol leaders' council (PLC) meeting in the year and hold patrol leader training. The troop will be **Silver** if it has 6 PLC meetings and **Gold** if it has 10 PLC meetings, including the annual planning meeting and one scout attends a National Youth Leadership training (NYLT) session or Order of the Arrow conference.

Place the dates of the PLC meetings, the next troop annual planning meeting, the troop patrol leader training session, the council NYLT session and Order of the Arrow conference on your planning calendar and tracking workbook. You are off to a great start.

The Outdoor Program is Next- Objectives # 6 & # 7 - Camping

The outdoor camping program is what makes Scouting fun and different! Camping is what Scouting does so let's schedule these objectives next. The troop camping program will require a large amount of parental help plus will be a significant part of the yearly troop budget. A good plan will help camping happen on schedule. First do **Objective # 6, Short-term camping: Conducts short-term or weekend camping through out the year**. A short-term campout contains at least one overnight stay. The troop planning session is the right time to indicate which months the troop is going camping. Other options include attending the district camporee, going to the large council Scout expo (if being conducted), going to a klondike derby or possibly camping with other units. These are all fun activities that need to be scheduled and planned. Going on 4 short term campouts qualify the troop at the **Bronze level**, 7 qualifies at **Silver** and 9 at **Gold**. One campout a month except the month going to summer camp will qualify as Gold. Show on the troop planning calendar which months have a campout and check off the number of months on the tracking workbook.

Next the troop planning team needs to consider **Objective # 7, Long-term camping: Participates in a long-term camp with a majority of the troop in attendance.** There are many possibilities to consider for a long-term camp which is identified as a summer camp consisting of at least 5 nights or a high adventure experience or jamboree or having a troop scout working on a summer camp's staff. Consider your council's camps first. Attending a long-term summer camp qualifies as **Bronze** level, if 60% of the Scouts registered on June 30 attend the troop qualifies at **Silver** level and 70% qualifies as **Gold** level. Obtain information about the council summer camps at the scout office, at roundtable, council training events, the district OA chapter or district outdoor program chair.

Have an assistant Scoutmaster or troop committee member be responsible for the troop camping program and encourage that Scouter to earn the Scouter's Training Award for accepting responsibility for this JTE objective.

Leadership and family engagement—Objective # 10

A Scout troop must have adult leadership and the unit should look to the parents or guardians of youth members for those leaders. Also, Scouts at all levels enjoy working towards and receiving their hard-earned badges. Next look at **Objective #10, Leadership and family engagement: The Troop is proactive in recruiting sufficient leaders and communicates regularly with parents.** A troop having at least one assistant Scoutmaster is at the **Bronze** level. A court of honor (COH) is when earned badges are presented, in front of the entire troop community, and offers an opportunity to talk to all the parents and reinforce the values of Scouting. Schedule 2 COH where troop plans are reviewed with parents and the troop is **Silver**, hold 3 and review troop plans with parents in each plus recruit one new adult leader for **Gold**. Having one quarterly (skip the summer) is a good plan. Certainly, have one in the spring to welcome new Scout families to the Unit, one after summer camp and one in the Fall to, again, welcome new Scout families. Place the dates for the courts of honor on the planning calendar.

Get the Troop Adult Leaders Trained-Objective # 11 - Trained leadership

The troop needs **Trained and engaged leaders at all levels.** What is the troop committee and what do they do? The answer lies in training. A significant amount of troop leader and troop committee training can be accomplished on-line using courses found at Scouting U. However, first and extremely important is that all adults interacting with the youth of your Troop must have **Youth Protection training or YPT.** This is a must and a rock-solid requirement and **non-negotiable.** This can be done on MyScouting and must be the first training done by any adult registered and associated with the troop.

Having the Scoutmaster **or** an assistant complete position-specific training and youth protection is required for the **Bronze level.** Having that Scoutmaster and 60% of the assistant Scoutmasters complete leader position specific training within three months of joining, if new, qualifies as the **Silver level.** **Gold** is obtained when 2/3 of the active troop committee members complete position specific training plus at least one adult registered in the troop, at some time this year or in years past, attended Wood Badge or another leadership training course of at least 5 days.

The on-line modules cover all necessary topics and is equivalent to classroom training. Leader registered positions, Scoutmaster and assistant, committee chair and member and Merit Badge Counselor have a set of appropriate modules that **must** be taken to be considered **TRAINED**. The modules are accessed from My.Scouting.org via *My Training* then *Requirements*. Training courses for whatever positions you are registered for will be shown. However, if you wish to take courses not shown, back up to *My Training* and select *YPT and Training Center*. This brings up a webpage showing various scout programs. Select **Scouts BSA** and then the title that best fits your registered position, either “Scoutmaster”, “Merit Badge Counselor”, “Troop Committee Chair” or “Troop Committee”. This takes you to the Learning Plans for that position. Each registered position has two to four module groupings and a suggested order for them to be taken. Select **Enroll** (or visit) and begin the training. **All** modules in the two to four groups, the entire Learning Plan, are required to be completed before a Scouter is considered completely **TRAINED** with the exception of Scoutmasters and Assistants, those positions also require an in-person “Introduction to Outdoor Leader Skills” session. See the attached chart titled **Scouts BSA Position Trained Requirements** for more information.

The BSA Learn Center/Scouting U website is improved constantly which means the steps described above might be slightly different over time.

Put the dates on the planning calendar when any new leaders need to complete their training. All new leaders registered in September must complete their training by the end of December. Put the district and council training dates for instructor led courses, particularly IOLS, on the calendar.

Below is a table of classroom delivered Scouts BSA position-specific training required to be considered **TRAINED** to the basic level and JTE qualified. The online equivalent for **S24** is shown in the included chart titled **Scouts BSA Position Trained Requirement**. There is no on-line equivalent for **S11**, Introduction to Outdoor Leader Skills, which must be taken in a classroom and in-the-field environment.

Troop Adult Leader Position and Code	Leader Position-Specific Training Course Title and Number
(SM) – Scoutmaster	Leader Position-Specific-Scoutmaster- Bronze or Silver (S24) IOLS-Introduction to Outdoor Leader Skills - Bz/Silver (S11)
(SA) – Assistant Scoutmaster	Leader Position-Specific-Scoutmaster- Bronze or Silver (S24) IOLS-Introduction to Outdoor Leader Skills - Bz/Silver (S11)
(CC) – Troop Chairman	Leader Position-Specific-Troop Committee Challenge - For Gold (WS10)
(MC) – Troop Committee Member	Leader Position-Specific-Troop Committee Challenge - For Gold (WS10)

Leader Position Specific-Scoutmaster training, Course **S24**, can be completed by taking a traditional classroom session or by using the **Scouting U** website on-line training. However, IOLS-Introduction to Outdoor Leader Skills, Course **S11**, as mentioned above, must be taken through a course conducted by district or council trainers.



SCOUTS BSA POSITION TRAINED REQUIREMENTS

SCOUTMASTER & ASSISTANT SCOUTMASTER	
BEFORE FIRST MEETING	
SCO_481 SCOUTING ORGANIZATION	12:20
SCO_472 AIMS & METHODS OF SCOUTS BSA	8:30
SCO_479 ROLE OF THE UNIT KEY 3	7:00
SCO_480 ROLES OF SCOUTMASTER & SP LEADERS	13:00
SCO_484 TROOP MEETING	10:10
TOTAL TIME: 50:30 MIN	
FIRST 30 DAYS	
SCO_478 PATROL METHOD	10:00
SCO_471 ADVANCEMENT	10:00
SCO_477 PATROL LEADERS COUNCIL MEETING	11:00
TOTAL TIME: 31 MIN	
FIRST 60 DAYS	
SCO_476 OUTDOOR PROGRAMS	10:00
SCO_482 TROOP COMMITTEE	14:00
SCO_485 SCOUTS BSA UNIFORMS	11:30
TOTAL TIME: 35:30 MIN	
POSITION TRAINED	
SCO_473 ANNUAL TROOP PROGRAM PLANNING	14:00
SCO_474 INTRODUCTION TO MERIT BADGES	8:00
SCO_475 OUTDOOR ETHICS	7:30
SCO_800 HAZARDOUS WEATHER TRAINING	31:00
SCO_530 JOURNEY TO EXCELLENCE	13:00
TOTAL TIME: 1 HOUR 13:30 MIN	
MERIT BADGE COUNSELORS	
BEFORE FIRST MEETING	
SCO_472 AIMS & METHODS OF SCOUTS BSA	8:30
SCO_474 INTRODUCTION TO MERIT BADGES	8:00
SCO_486 WHAT IS A MERIT BADGE COUNSELOR	7:00
TOTAL TIME: 23:30 MIN	
POSITION TRAINED	
SCO_471 ADVANCEMENT	10:00
TOTAL TIME: 10 MIN	

TROOP COMMITTEE MEMBERS	
BEFORE FIRST MEETING	
SCO_481 SCOUTING ORGANIZATION	12:00
SCO_472 AIMS & METHODS OF SCOUTS BSA	8:30
SCO_482 TROOP COMMITTEE	14:00
TOTAL TIME: 34:30 MIN	
POSITION TRAINED	
SCO_476 OUTDOOR PROGRAMS	10:00
SCO_471 ADVANCEMENT	10:00
SCO_485 SCOUTS BSA UNIFORMS	11:30
SCO_473 ANNUAL TROOP PROGRAM PLANNING	14:00
SCO_474 INTRODUCTION TO MERIT BADGES	8:00
SCO_530 JOURNEY TO EXCELLENCE	13:00
TOTAL TIME: 1 HOUR 6:30 MIN	
TROOP COMMITTEE CHAIR	
BEFORE FIRST MEETING	
SCO_481 SCOUTING ORGANIZATION	12:00
SCO_472 AIMS & METHODS OF SCOUTS BSA	8:30
SCO_479 ROLE OF THE UNIT KEY 3	7:00
SCO_482 TROOP COMMITTEE	14:00
SCO_483 TROOP COMMITTEE MEETINGS	6:00
TOTAL TIME: 47:30 MIN	
POSITION TRAINED	
SCO_476 OUTDOOR PROGRAMS	10:00
SCO_471 ADVANCEMENT	10:00
SCO_485 SCOUTS BSA UNIFORMS	11:30
SCO_473 ANNUAL TROOP PROGRAM PLANNING	14:00
SCO_474 INTRODUCTION TO MERIT BADGES	8:00
SCO_530 JOURNEY TO EXCELLENCE	13:00
TOTAL TIME: 1 HOUR 6:30 MIN	

THE ONLINE TRAINING PLANS LISTED ABOVE ARE ALSO AVAILABLE IN A CLASSROOM FORMAT:

Scoutmaster & Assistant Scoutmaster: S24 Scoutmaster Specific Training
 Merit Badge Counselor: D76 Merit Badge Counselor Orientation Training
 Troop Committee Chair & Committee: WS10 Troop Committee Challenge

S11 - Introduction to Outdoor Leader Skills (IOLS) is an outdoor classroom training required for Scoutmaster and Assistant Scoutmasters to be classified as position trained.

Scouter's Training Award for Scouts BSA Leaders

Progress Record & Application



Candidate's Information

Name: _____

Address: _____

City, State, Zip: _____

Email: _____ Phone: _____

Troop#: _____ District: _____ Council Name: _____

Tenure

Complete at least two years of tenure as a registered adult leader in a Scouts BSA troop.

From _____ To _____

From _____ To _____
(Month/Year) (Month/Year)

Training

Complete Scouts BSA Leader Position Specific Training for your registered position(s)

Online Or Facilitated Training

Participate in at least one additional supplemental* or advanced training event at the council, area, region, or national level during the two years.

**Contact your local council for supplemental training availability.*

Attend a university of Scouting, or attend at least four roundtables during each year of the tenure used for this award.

Performance

Do the following during the tenure used for this award:

Participate in an annual troop planning meeting in each year.

Serve as a registered adult leader in a troop that achieves at least the Bronze level of Journey to Excellence in each year.

Give primary leadership in meeting at least one troop Journey to Excellence objective in each year.

Approved by:

Troop Committee Chair

Date

District/Council Training Committee Action

The applicant has met all the requirements for the Scouter's Training Award for Scouts BSA.

Approved by:

District or Council Training Committee Chair

Date

Next steps:

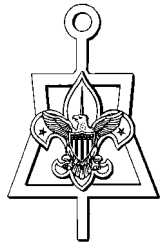
- Submit this original document to your local District/ Council Service Center to be processed.
- Return a copy of this approved document to the troop so they can purchase the award at the local Scout Shop.



BOY SCOUTS OF AMERICA®

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Scoutmaster's Key Progress Record



Candidate's Personal Information

Name: _____

Address: _____
City State Zip

Email: _____

Troop No. _____ District: _____

Council Name: _____

Tenure

Complete at least three years of registered tenure as a Scoutmaster within a five-year period. (This can include the tenure used to earn the Scouter's Training Award.)

From _____ to _____

From _____ to _____

From _____ to _____

Training

Complete basic training for Scoutmasters.

Attend a university of Scouting (or equivalent), or attend at least four roundtables (or equivalent) during each year of the tenure used for this award.

Approved by:

Troop Committee Chair

Date

Performance

Do the following during the tenure used for this award:

Achieve at least the Silver level of Journey to Excellence for at least two years. The Quality Unit Award is acceptable if the tenure used is prior to 2011.

Conduct an annual troop planning session and have a published troop meeting/activity schedule for the troop's parents in each year.

Earn the National Outdoor Challenge Award at least once.

Participate in at least one additional supplemental or advanced training event at the council, area, region, or national level.

Approved by:

Troop Committee Chair

Date

Training Committee Action

The leadership training committee has reviewed this application and accepts the certification that the candidate meets the required standards. The Scoutmaster's Key is approved.

Approved by:

District or Council Training Committee Chair

Date



Unit Leader Award of Merit

Background

Quality unit leadership is the key to a quality unit program—and it leads to better Scout retention. Statistics show that if young people stay engaged in the program for at least five years, the BSA's influence likely will stay with them for the rest of their lives. A quality Scouting experience will help keep Scouts in the program, and the Boy Scouts of America created the Unit Leader Award of Merit to recognize the quality unit leaders who make that happen.

The Unit Leader Award of Merit replaces the Scoutmaster and Venturing Crew Advisor award of merit programs. This new recognition has revised requirements, and Cubmasters and Skippers are also eligible for this recognition.

Requirements

The nominee must

1. Be a currently registered Cubmaster, Scoutmaster, Advisor, or Skipper who has served in that position at least 18 continuous months.
2. Meet the training requirements for the registered position.
3. Distribute a printed or electronic annual unit program plan and calendar to each family in the unit.
4. Have a leader succession plan in place.
5. Effectively use the advancement method so that at least 60 percent of the unit's youth have advanced at least once during the last 12 months.
6. Cultivate a positive relationship with the chartered organization.
7. Project a positive image of Scouting in the community.

Nomination Procedure

1. The unit committee chair completes the Unit Leader Award of Merit Nomination Form on behalf of the unit committee. For Boy Scout troops, Venturing crews, and Sea Scout ships, the nomination must include endorsement by the senior patrol leader, crew president, or ship's boatswain, respectively.
2. The unit or district commissioner certifies that the form is complete.
3. The unit submits the nomination form to the council for approval by the Scout executive and council commissioner or president. **The council is responsible for processing the award.**

The Award

Upon receipt of the approved nomination form, the council may present the Unit Leader Award of Merit, which includes a certificate, square knot with the appropriate device, and a special unit leader emblem. Recognition of this achievement may be presented at appropriate district or council events, such as district or council leader recognition dinners, training events, and board meetings.

The award may be presented to the unit leader for each program, Cub Scouts, Boy Scouts, Venturers, and Sea Scouts, if the individual meets the requirements in each program. Only one knot is worn with the devices of each program that the award was earned in.

Unit Leader Award of Merit certificate, No. 512004

Cubmaster emblem, No. 610094

Unit Leader Award of Merit square knot, No. 610091

Venturing Advisor emblem, No. 610095

Scoutmaster emblem, No. 610093

Skipper emblem, No. 635892



Unit Leader Award of Merit Nomination Form

Submit to your local council service center.

Nominee's name as it is to appear on the certificate: _____

Address _____

City _____ State _____ Zip _____

Select one:

- | | | |
|--------------------------------------|-----------------|------------------------------|
| <input type="checkbox"/> Cubmaster | Pack No. _____ | Chartered organization _____ |
| <input type="checkbox"/> Scoutmaster | Troop No. _____ | Chartered organization _____ |
| <input type="checkbox"/> Advisor | Crew No. _____ | Chartered organization _____ |
| <input type="checkbox"/> Skipper | Ship No. _____ | Chartered organization _____ |

Service

Inclusive dates for the service in the above-selected position (include month and year; must be at least 18 continuous months of service in this position).

From _____ to _____ Number months of service _____

Training

Date nominee completed training requirements for this position (month and year) _____

Unit Program Plan

- Yes, this nominee's unit has an annual unit program plan and calendar, and it is shared with all families in the unit.
Unit committee chair initial _____

Succession Plan

- Yes, the unit has a replacement recruited and committed to take over the nominee's position as unit leader if necessary.
Replacement's name _____ Unit committee chair initial _____

Advancement

- Yes, at least 60 percent of the members of the nominee's unit have advanced at least once during the past 12 months.
Unit committee chair initial _____

Chartered Organization Relationship

- Yes, this nominee has a good relationship with the chartered organization.
Unit committee chair initial _____

Community Image

- Yes, this nominee has a positive image in our community.
Unit committee chair initial _____

Please attach a statement by the unit committee chair on behalf of the unit committee attesting to the nominee's performance as unit leader. For Scoutmaster nominations, also attach a statement by the troop's senior patrol leader. For crew Advisor nominations, also attach a statement by the crew president. For Skipper nominations, also attach a statement by the ship's boatswain.

Nominated by _____ Certified by _____
Unit committee chair Unit or district commissioner

Date of nomination _____

Approved by _____ Date _____ and _____ Date _____
Scout executive Council commissioner or president



Continued Training-Adult recognitions

Encourage the troop leadership, those in the positions in the chart above, to continue their individual training. Recruit an adult to be the troop training coordinator. Schedule the dates of the monthly district roundtable on the troop planning calendar. Find the dates for district and council training events and place them on the schedule as well. University of Scouting, a source of excellent advanced training usually occurs in January. Other advanced leader position-specific training occurs year round. Encourage the troop trainer to get involved with the district training team.

Encourage the Scoutmaster, the committee chair, troop trainer and all committee members to work on and earn their **Scouter's Training Award for Scouts, BSA** (green square knot on tan background). This award (511-058_WB) requires, among other items, participation in the Troop planning session and giving primary leadership in meeting one troop JTE objective area. The JTE objective goals are established in the troop planning session and the adult provides the leadership to achieve the goal. Assign these objectives to troop committee members and ask them to work towards training awards. These objectives are further explained further in this guidebook and the information will help those providing leadership for advancement, membership, service projects, outdoor activities, a troop budget and the recharter process. Put on the planning calendar any training dates that apply and show their assigned responsibilities on the calendar next to the items.

The Scoutmaster can continue in service and training and be recognized. At 18 months of service there is the **Unit Leader Award of Merit-Scoutmaster** (512-003_WB) and at 3 years of service there is the **Scoutmaster's Key** (green and white square knot on tan). This award (511-54_WB) requires, among other things, three years of tenure, conducting a troop planning session for each year and having the troop qualify as a JTE Silver troop for 2 of the 3 years of tenure.

Be sure and have a troop plan that will have the troop earn at least the JTE Silver JTE Award.

Progress records for each of these two awards are attached at the back of this unit guide.

Wood Badge, a 5-day training course, continues the Scouting program leader training. It is generally offered by the council once if not twice per year over two weekends, a three-day session followed by a two-day session. Place the dates of the next Wood Badge course on the troop calendar.

You now have a plan for fun troop activities and for getting the troop leaders trained. What next?

Community service--Objective # 8

Then look at **Objective # 8, Service projects: Participates in service projects with at least one benefitting the chartered organization.** Plan the dates for service projects during the planning session. Participate in Scouting for food, a Veteran's Day parade or a flag ceremony. The possibilities are nearly endless. Before the planning meeting contact your chartered organization and ask about service projects. If that is not possible, plan the date when a troop committee member will contact the chartered organization and coordinate the project. All hours worked on projects must be entered into Scout Book. Have your unit Scout Book administrator show the service project coordinator how to do this. The troop needs to create a service hour account with password. Just 3 service projects qualifies the unit as **Bronze**, 4 as **Silver** and 5 as **Gold**.

Appoint a troop committee member to coordinate troop service projects. That person should have the responsibility to enter the project data into the JTE service hour webpage and that adult can be working on their **Scouter's Training Award for Scouts, BSA** while achieving this troop JTE objective.

Service projects can be any activity that benefits another individual, the troop's chartered organization, scouting or any cause of choice. Suggestions include:

Scouting for food	Book and magazine drives
Assist with council and district activities	Assist the elderly
Remember others during the holidays	Pet shelters
Litter cleanup and beautification	Serving food
Safety related projects	
Assist (not participation) local youth sports groups	
Repair and maintenance of homes, buildings and offices of worthy causes including Scouting	
Assisting medical information distribution and drives (such as blood donations)	

Recruiting new Scouts—Objective # 2

What other dates need to be on the planning calendar? Some very important dates are associated with recruiting new Scouts. Your unit should have a series of recruiting events, activities like school nights, a sign up table at events at your sponsor's location (if applicable) or a community recruiting roundup. Place these dates on your planning calendar. One of the troop committee members should be the troop membership chair and, while working on their **Training Award** provides leadership for membership. Look at **Objective # 2, Building Scouting: Recruit new youth into the troop in order to grow membership** provides recruiting goals to consider. A troop can create entire new patrols through recruiting. Or, Scouts can be added to existing patrols, discuss with the PLC which works best for your troop. Be sure to invite the parents of any new Scout to the next troop committee meeting and have a job for them to do. Preparing a membership plan that includes recruiting activities or using a personalized recruiting method and having an up-to-date PIN on the "Be a Scout" website qualifies as **Bronze level**. Being Bronze and having 25 registered Scouts or a gain of just one scout is the **Silver level** and a gain of 5% or having 35 registered Scouts is **Gold**. Your unit membership plan should list where and how recruiting is to be done and who is responsible. The membership plan needs to address the number of new Scouts expected so the unit is prepared.

An important troop committee position is the membership chair. That person leads the recruiting activities for the troop while working on their **Scouter's Training Award for Scouts, BSA**.

Help Cub Scouts become Scouts in Your Unit—Objective # 4

Webelos Cub Scouts move on to Scout troops and continue with the Scouting fun. **Objective # 4, Webelos-to-Scout transition: Have an effective plan to recruit Webelos Scouts into the troop** helps explain how to recruit Cub Scouts into your troop. There may be several Cub Scout packs in your area and one may be sponsored by the same charter partner. Make contact with the leaders of the packs of interest and have a combined transition plan. Each Scout troop should be planning on a transition for Webelos as a part of their JTE Planning process. Ask at roundtable if you need more information about local packs. Your troop is at the **Bronze level** if you hold two joint activities with a pack or a Webelos den. Place these two dates on your planning calendar. The troop will be at the **Silver level** if 2 Webelos join your troop and **Gold** if 5 join plus your unit provides at least one den chief. One of the proudest moments of a Webelos Scout is the bridging ceremony when he or she joins a Scout troop.

The Troop Budget—Objectives # 1

Objective # 1, Planning and budget: Have a program plan and budget that is regularly reviewed by the committee and it follows BSA policies relating to fundraising. Information about how to prepare a troop budget and a sample budget are attached at the end of this guidebook.

Having a written budget that follows BSA policies and is adopted by the committee is **Bronze level**, having a planning meeting involving youth leaders for the following year is **Silver level** and having the troop committee meet 6 times to review (program plans) and budget is **Gold level**. Put the committee meetings and planning session dates on the troop calendar.

The schedule you have prepared will help determine your budget. How much money will you spend per Scout? Read and fill in the troop budget material based on your expenses and fund-raising activities. Purchase Scout Life Magazine for each family and be sure to schedule the dates for the council popcorn sales activity. Recruit a parent to be your unit Popcorn Kernal.

Advancement happens in the patrol, on campouts and at camp—Objective # 5

Advancement activities can happen during a troop meeting and any other activity scheduled by the troop. Awarding badges at planned courts of honor is a good way to motivate scouts to work on advancements. Encourage the scouts, patrol leaders and patrol parents to help the Scouts on advancement. **Objective # 1, Advancement: Achieve a high percentage of Scouts earning rank advancements** is very important. When 40% of the Scouts earn one rank the unit qualifies as **Bronze level**, 50% qualifies as **Silver level** and 60% as **Gold level**. Use all the techniques explained in leader training to encourage advancement.

Have a parent be the advancement coordinator and work on their **Scouter's Training Award for Scouts, BSA**.

A Measure of How Well the Unit is Doing—Objective # 3

The best measure of how well the troop is doing in Scouting is the measure of how many Scouts come back for another year. This is shown by **Objective # 3, Retention: Retain a significant percentage of youth members**. This item measures the percentage of Scouts who were age eligible and reregistered for the next year. Retention does not count 17-year old Scouts who aged out. If 75% of the Scouts reregister the unit is at the **Bronze** Level, 80 % it is at the **Silver** level and at 85% it is at the **Gold** level. Retention is a measure of many things, the fun of troop meetings and the excitement of the other activities planned and done during the year. A solid year long schedule with well planned and put on events will build strong units and the scouts will keep coming back because it is fun.

Resources Found on the BSA National Council webpages

Find a wealth of program, planning and training resources
Look for these items as well.

ScoutStrong PALA, publication 210-041

Unit Programming tools, many resources including monthly theme program features

Troop Meeting Plan, publication #34425

Planning Your Troop's Annual Program Budget

What is the unit budget plan? It is implementing the elements of a complete annual Scouting program, committing as a unit to incorporate these elements, and then providing adequate funding for them.

If you like to raise money every month, plan your program as you go, limit your activities based on the unit's income, or not involve the Scouts in the planning process, then this format may not be for you! Those leaders who want a meaningful, exciting, and comprehensive program that achieves the objectives of the Scouting program will find this format the ideal way to go.

The result is a well-managed, well-financed unit.

Recognizing this, the BSA recommends the following recipe:

1. **Plan** your troop's complete annual program.
2. **Develop** a budget that includes enough income to achieve the program.
3. **Identify** the amount of product (popcorn, for example) that will need to be sold per Scout to reach the income goal.
4. **Identify** service projects that the troop can participate in to bring income to the unit.
5. **Get** commitments from parents and Scouts.

BASIC EXPENSES

1 Registration Fees. When a Scout joins, the unit normally asks him or her to pay the full \$66 national registration fee.

If the Scout joined using online registration, the family pays national registration fees directly.

The national registration fee is \$75 for an annual membership for Scouts and \$45 for adults. New members when they first join pay a one-time \$25 joining fee. Based on when they join, registration fees may be prorated. Check with your local council for how it handles registration fees for new Scouts and how it impacts rechartering. Local councils might also have additional activity fees they collect.

2 Unit Liability Insurance Fee. Troops are required to pay an annual unit liability insurance fee of \$75. This fee is submitted with the troop's annual charter application and helps to defray the expenses for their general liability insurance.

3 Scout Life. *Scout Life*, the official magazine of the Boy Scouts of America, is recommended for all members at \$15, half-off the published rate. (Prorated fees are available for Scouts who join a unit during the year.) Every Scout should subscribe to *Scout Life* because of the quality reading and the articles related to your unit's monthly program. It is part of every Scout's growth and provides a monthly connection to Scouting. Scouts who subscribe to *Scout Life* stay in Scouting longer and advance more quickly.

4 Unit Accident and Liability Insurance. Protecting the leadership and parents from financial hardship due to high medical bills from an unfortunate accident is a must for all involved in Scouting. Specific details on insurance programs are available from the local council.

5 Advancement and Recognition. Every Scout should earn and advance a rank each year. The Scouts BSA advancement program has a number of options that include achievements, rank advancement, and merit badges.

6 Activities. Well-conceived and well-planned activities are critical to a successful annual program plan. Traditionally, such activities as hikes, camping, or high-adventure trips are financed by the Scout and his or her family over and above the dues programs. It is suggested that the complete cost of these outings be built into the unit's budget.

7 Summer Camp. Central to Scouting is a summer camp experience. Local and national opportunities abound for Scouts BSA members to have an exciting, program-rich summer experience.

8 Program Materials. Each unit needs to provide a certain amount of program materials. Depending on the type of program, these could include craft tools and supplies, camping equipment, videos and books, or ceremonial props. (Note: Units may not hold title to property; only chartered organizations or the local council legally can own property.)

9 Training Expenses. Trained leaders are the key to delivering a quality and safe program. Both adult- and youth-leader training should be considered an integral annual expense.



10 Full Uniforms. Traditionally, the individual pays for the uniform. We suggest that these expenses become part of the total cost of Scouting. The full Scouting program includes the full uniform!

11 Reserve Fund. The reserve fund might be established by a gift or loan from the chartered organization, by members of the committee, or by a unit money-earning project. The reserve fund should meet unexpected expenses. A new member's initial expenses may be met from the fund.

12 Other Expenses. These could include a gift to the World Friendship Fund, meeting refreshments, and/or contingency funds.

SOURCES OF INCOME

One well-planned fundraiser per year, such as selling popcorn, will help prevent having to ask families for extra money every week.

SOME IMPORTANT POINTS

Paying your own way. This is a fundamental principle of the Boy Scouts of America. It is one of the reasons no solicitations (requests for contributions from individuals or the community) are permitted by units. Young people in Scouting are taught early on that if they want something in life, they need to earn it. This principle is among the reasons that adults who were Scouts are found to have higher incomes. The unit's entire budget must be provided for by the families, through either fundraising or other means such as dues or fees.

Except for council-sponsored fundraisers, all other fundraising projects require the submission of the Unit Money-Earning Application, No. 34427, to the local council. To ensure conformity with all Scouting standards on earning money, leaders should be familiar with the eight guides listed on the back of the application and in the financial record books.

The Troop Operating Budget Worksheet

To develop your troop's budget, complete the worksheet and then share it with the Scouts' parents. In the case of Scouts BSA troops, the patrol leaders' council reviews the budget and puts it in final form prior to study and adoption by the troop committee. Be sure to keep parents involved and informed. Program calendar and budget information needs to be communicated regularly to families, especially at the start of the program year.



UNIT MONEY-EARNING APPLICATION

Applications are not required for council-coordinated money-earning projects such as popcorn sales or Scout show ticket sales.

Please submit this application to your council service center at least two weeks in advance of the proposed date of your money-earning project. Read the 10 guides on the other side of this form. They will help you in answering the questions below.

Pack
 Troop No. _____ Chartered Organization _____

Team
 Crew
Community _____ District _____

Submits the following plans for its money-earning project and requests permission to carry them out.

What is your unit's money-earning plan? _____

About how much does your unit expect to earn from this project? _____ How will this money be used? _____

Does your chartered organization give full approval for this plan? _____

What are the proposed dates? _____

Are tickets or a product to be sold? Please specify. _____

Will your members be in uniform while carrying out this project? (See items 3-6 on other side.) _____

Have you checked with neighboring units to avoid any overlapping of territory while working? _____

Is your product or service in direct conflict with that offered by local merchants? _____

Are any contracts to be signed? _____ If so, by whom? _____

Give details. _____

Is your unit on the budget plan? _____ How much are the dues? _____

How much does your unit have in its treasury? _____

Signed _____ Signed _____
(Chartered Organization Representative) (Unit Leader)

Signed _____ Signed _____
(Chairman, Unit Committee) (Address of Chairman)

FOR USE OF DISTRICT OR COUNCIL FINANCE COMMITTEE: Telephone _____

Approved by _____ Date _____

Approved subject to the following conditions _____

GUIDES TO UNIT MONEY-EARNING PROJECTS

A unit's money-earning methods should reflect Scouting's basic values. Whenever your unit is planning a money-earning project, this checklist can serve as your guide. If your answer is "Yes" to all the questions that follow, it is likely the project conforms to Scouting's standards and will be approved.

1. *Do you really need a fund-raising project?*

There should be a real need for raising money based on your unit's program. Units should not engage in money-earning projects merely because someone has offered an attractive plan. Remember that individual youth members are expected to earn their own way. The need should be beyond normal budget items covered by dues.

2. *If any contracts are to be signed, will they be signed by an individual, without reference to the Boy Scouts of America and without binding the local council, the Boy Scouts of America, or the chartered organization?*

Before any person in your unit signs a contract, he must make sure the venture is legitimate and worthy. If a contract is signed, he is personally responsible. He may not sign on behalf of the local council or the Boy Scouts of America, nor may he bind the chartered organization without its written authorization. If you are not sure, check with your district executive for help.

3. *Will your fund-raiser prevent promoters from trading on the name and goodwill of the Boy Scouts of America?*

Because of Scouting's good reputation, customers rarely question the quality or price of a product. The nationwide network of Scouting units must not become a beehive of commercial interest.

4. *Will the fund-raising activity uphold the good name of the BSA? Does it avoid games of chance, gambling, etc.?*

Selling raffle tickets or other games of chance is a direct violation of the BSA Rules and Regulations, which forbid gambling. The product must not detract from the ideals and principles of the BSA.

5. *If a commercial product is to be sold, will it be sold on its own merits and without reference to the needs of Scouting?*

All commercial products must sell on their own merits, not the benefit received by the Boy Scouts. The principle of value received is critical in choosing what to sell.

6. *If a commercial product is to be sold, will the fund-raising activity comply with BSA policy on wearing the uniform?*

The official uniform is intended to be worn primarily for use in connection with Scouting activities. However, council executive boards may approve use of the uniform for any fund-raising activity. Typically, council popcorn sales or Scout show ticket sales are approved uniform fund-raisers.

7. *Will the fund-raising project avoid soliciting money or gifts?*

The BSA Rules and Regulations state, "Youth members shall not be permitted to serve as solicitors of money for their chartered organizations, for the local council, or in support of other organizations. Adult and youth members shall not be permitted to serve as solicitors of money in support of personal or unit participation in local, national, or international events."

For example: Boy Scouts/Cub Scouts and leaders should not identify themselves as Boy Scouts/Cub Scouts or as a troop/pack participate in The Salvation Army's Christmas Bell Ringing program. This would be raising money for another organization. **At no time are units permitted to solicit contributions for unit programs.**

8. *Does the fund-raising activity avoid competition with other units, your chartered organization, your local council, and the United Way?*

Check with your chartered organization representative and your district executive to make certain that your chartered organization and the council agree on the dates and type of fund-raiser.

The local council is responsible for upholding the Charter and By-laws and the Rules and Regulations of the BSA. To ensure compliance, all unit fund-raisers MUST OBTAIN WRITTEN APPROVAL from the local council NO LESS THAN 14 DAYS before the fund-raising activity.

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