

Troop 1 Trip Summary User Guide

This document identifies the process to complete a Troop 1 trip summary.

See section at end for using this template for trip cost estimation.

One week before trip, the Scout in charge will:

- Download a blank trip form from the Troop 1 web site (form is in Excel).
(http://www.troop1hopkinton.org/trooponly/Info/troop1_trip_expense_template.xls)
- Save the downloaded file as
"troop1_trip_expense_<tripname>_<moyear>.xls" (e.g
troop1_trip_expense_minirek_092007.xls)
- Complete the trip info section including:
 - o Trip info, start and end date of trip
 - o Cost per scout
 - o Scout coordinator
 - o Verify that a tour permit has been applied for and received.
 - o Fill in the names of the adult leaders that have been identified for the trip. Estimate mileage and tolls for each adult planning to drive.
 - o Identify Scouts that have indicated their intent to participate in the trip (leave grey areas blank).
 - o Tent # (if tents are needed for the trip)
 - o Identify any known miscellaneous expenses on the "MiscExpenses" tab (may need input from the adult leaders on this).
 - o Put an "X" in the Preliminary Report checkbox on the bottom-right corner of the form.
- Save the file and send a copy to the Treasurer, Trip Coordinator and Troop Committee Chairman (see <http://troop1hopkinton.org/Troop1committee.htm> if you are unsure who these folks are.

Note: cells shaded in green are auto-calculated.

At trip departure, the scout in charge will:

- Bring a hardcopy of the completed template to the departure point.
- Check with adult leader if any Scout adds or drops have been occurred since the Troop meeting.
- Do a roll call of planned participants from the template, noting any absences.
- Verify tent numbers (optional)

Prior to the first meeting following the trip, the Scout in charge will:

- Send an email reminder to the troop that all expenses related to the trip must be submitted at the meeting.

- Print out two hardcopies of the spreadsheet (including MiscExpense tab) and bring to the next troop meeting. Give one copy to the quartermaster to assist with gear return.

At first troop meeting following trip, the scout in charge will:

- Collect all receipts for expenses incurred. This includes Colella receipts, event receipts (lodging, campground, etc.). Food or other expenses incurred by a Scout should be noted in the field next to the Scout name. Expenses incurred by an adult will be noted on the MiscExpense tab of the spreadsheet. This entry will require a summary of the expense, the amount of the expense and the name of the adult incurring the expense.
- Check with drivers for mileage and toll information, update spreadsheet.
- Put an X in column A next to each Scout that attended the event.

After the troop meeting and within two weeks of the trip, the Scout in charge will:

- Update the electronic copy of the spreadsheet, paying close attention to scout attendance at the event, reimbursable expenses and who incurred them.
- Mark "X" next to Final Report on the bottom, right corner of the spreadsheet.
- Print out the Final Report and staple all receipts to the report. Provide hard copy to Trip Coordinator as soon as possible. Trip Coordinator will review for completeness and submit final summary to Treasurer.
- Once the Trip Coordinator approves spreadsheet, the Scout in charge will send the "final" spreadsheet to the Treasurer, Trip Coordinator and the Troop Committee Chairman for reference only.

The Treasurer will:

- Complete the grey sections on both tabs of the spreadsheet.
- Correlate the checks/cash received against those that were signed up for the trip. Capture check no. if appropriate in column F.
- Check receipts submitted to ensure dollar correctness and ensure receipts are tied to the correct person.
- Determine which adults should pay and which are being covered by the troop.
- Complete the grey "reimbursements" section on the MiscExpenses tab. The variance should come out to \$0 if all reimbursements have been made.
- Contact parents that have not paid.
- Provide a completed copy of the spreadsheet (with reimbursement info) to the Trip Coordinator and the Troop Committee Chairman. The completed electronic form will be stored on the Troop 1 web site for further reference as needed.
- Provide a profit/loss summary of the trip at the next troop committee meeting.

An SAMPLE completed form can be found at
http://www.troop1hopkinton.org/trooponly/Info/troop1_trip_expense_minitrek_092007.xls

Trip Estimation

The template provides a pretty good method for estimating the cost per scout for an upcoming event.

- Download a blank trip form from the Troop 1 web site (form is in Excel).
(http://www.troop1hopkinton.org/trooponly/Info/troop1_trip_expense_template.xls)
- Estimate the number of scouts you will have attending. Fill in the names of the potential attendees in column B (under the Scout section)
- Fill in the names of the adults that you will need and will likely participate.
- Provide a rough mileage and toll estimate for each driver.
- Estimate your total food expense and place in the first "Food/other expense" cell.
- Estimate any additional expenses and place those on the MiscExpenses tab.
- As you add in these various values, you'll see the Estimated Cost Per value change at the top of the spreadsheet.

*this method can and should be used to estimate a reasonable cost per scout for any upcoming trip.