

How Boy Scouts of America Uses PLANERGY to Manage Spend



Seven years ago, Brian Hall went looking for a better way to manage purchasing in his organization.

Hall is the business manager for the Trapper Trails Council of the Boy Scouts of America. He's in charge of boy scout accounting software for the council—along with oversight for purchasing as it relates to personnel management in the organization. Their case study is available [here](#).

More About Trapper Trails Council

Trapper Trails is a nonprofit headquartered in Ogden, Utah, but its operations are spread across parts of Utah, Wyoming, and Idaho.

The council operates eight camps, two service centers, two field offices, a trading post, and its headquarters. It all supports individual boy scout troops from across its territory.

As a nonprofit with widely-dispersed locations and dozens of people making purchases, Trapper Trails needed a reliable, transparent process to control spending across its organization.

Six years ago, they put one in place.

Hall was kind enough to spend some time with us recently to tell us the story.

Overseeing Purchasing Across Multiple Camps and Locations

Employees for Trapper Trails make a wide variety of purchases every day.

“Each camp has a retail store plus a cafeteria,” Hall told us. “There are maintenance things to buy. We have a fleet of vehicles. We have three other standalone service centers that buy office supplies and other various things.”

“From guns and canoes to fidget spinners and tent stakes, to computers and printer paper,” Hall added. “We buy everything.”

In the past, employees used triplicate purchase orders. The nature of running camps, however, means employees sometimes need their items quickly. Retail store items, equipment repairs, or food, for example, might be needed immediately.

The paper system allowed purchases to happen, but it didn't allow the council to have full control or visibility into what was being purchased.

“We had to relinquish some of that control and just let people do their own thing,” Hall said. “It was unrealistic to try and approve every single purchase order in our old system.”

To gain better control, Hall and the leadership at Trapper Trails went looking for systems that could work for boy scout financial software.

The Move to a Cloud-Based Purchasing System

Trapper Trails Council found PLANERGY while searching Google for Procure-to-Pay software and financial management software.

It appeared to be exactly what Hall and the council leadership was looking for: an

online purchasing system that provided full control and visibility for all purchases across an organization.

We looked at several other systems, but PLANERGY seemed to be the best one for our needs.

Trapper Trails implemented PLANERGY in 2011.

Hall and the team set up purchasing authorization for employees at the different camps and locations. The organization has 50 licenses to work with.

Each purchaser was given unique permissions and authorizations based on their needs.

“Depending on the person’s position, some people have the ability to approve their own purchases,” Hall said. “Others can approve purchases up to \$100. Others up to \$1,000. Above \$6,000, it takes two approvals. And then above \$15,000, it takes three people to approve.”

Trapper Trails has now made over 10,000 purchases in the six years since implementing PLANERGY.

The Results of Implementing a Cloud-Based Purchasing System

Implementing PLANERGY has provided the Trapper Trails Boy Scout Council the control it needed for its organization.

Hall now oversees all purchasing within Trapper Trails.

He has full visibility to every purchase, no matter where it was made or who created the purchase order, including the ones that used to be delegated to the individual locations.

The tool is cost-effective and easy-to-use for employees across the organization, and it was quickly adopted by staff.

“With PLANERGY, we can approve purchase orders in real time without having to send anything through the mail,” Hall told us. “And our camps in different states

can communicate with us for approvals when they need anything,” Hall added.

Most of all, Hall said, it meant employees no longer had an excuse not to follow the organization’s purchasing process.

“It’s made our approval process quicker and less cumbersome, and it’s taken away people’s excuses for not following policies and procedures,” Hall said. “I’d recommend it to anyone in a similar situation.”

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