

The Together Plan



The Family of Scouting



BOY SCOUTS OF AMERICA®

The Together Plan

The Family of Scouting

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PURPOSE

The Together Plan provides best practices for reaching out to organizations in communities and presenting opportunities for these organizations to organize new Boy Scout units. This is a supplementary reference manual for council membership professionals and committees, commissioners, and chartered organization representatives and is in support of the BSA National Strategic Plan in supporting the full family of Scouting. Many lessons learned in successful membership activities in use across the country are presented in this version. They include:

1. Membership Events

The original Together Plan was designed to bring a group of potential chartered organizations to a single event. The best practices from the Together Plan are presented in this section.

2. Membership Blitz

The new-unit blitz is a structured sales call strategy introduced in 2000 by Chuck Truza where the membership team mobilizes to go out to visit the potential chartered organizations. The best practices from the new-unit blitz campaign are presented in this section.

3. Event Planning

Many councils host a range of events aimed at strengthening existing units through membership development or capital campaigns. This section provides an outline for event planning best practices.

4. Membership Development

This section includes a review of the current processes prescribed for starting a new unit, promoting the family of Scouting, and using the resources from the Membership Impact Department for identifying and growing units.

5. Membership Recognition

This section reviews the resources for recognizing the accomplishments associated with new-unit development.

The Boy Scouts of America's National Strategic Plan for 2011–2015 contains Youth Advocacy and Strategic Relationships Pillar objectives that promote the family of Scouting.

Objective IV: Our local councils are positioned to strengthen current relationships with traditional chartered organizations and build relationships with new partners through innovative alliances and youth advocacy.

Strategies to Achieve the Objective: Support local council plans for utilizing the **full family of Scouting** offerings and provide councils with guidelines and tools for reaching out beyond traditional chartered organizations. Review and revamp, if required, local council volunteer recognition/rewards programs in regard to chartered organization and other relationships. Study possible new organization, relationship, and sponsorship models to grow the number of Scouting units and youth members.

See www.scouting.org/scoutsource/Media/StrategicPlan.aspx and www.speakers.scouting.org/filestore/pdf/StrategicPlan/YouthAdvocacyandStrategicRelationshipsDraftV12.pdf.

MEMBERSHIP EVENTS

The Together Plan

The organization of new units is the major source of membership growth in a council or district. The Together Plan is one of the ways of organizing new units to help achieve each council- and district-growth plan.

What Is a Together Plan?

A Together Plan is a systematic approach to simultaneously organizing a large number of units. The campaign approach can be as successful in generating new units as it is in raising money.

The key event in the plan is a meeting of representatives from prospective chartered organizations. During this meeting, opportunities and responsibilities of a chartered organization are explained, and a meal is usually provided (breakfast, brunch, lunch, or dinner).

Trained volunteers sit with each group to answer their questions and to encourage their acceptance of the challenge to provide Scouting as a ministry or community service outreach program for young people and their families.

Enthusiasm builds as group after group announces their decision to use the Scouting program to reach its youth service goals. The Together Plan requires carefully selected volunteers in order to succeed. In a single meeting, these volunteers accomplish the work normally completed by many individuals conducting numerous organization meetings throughout a whole year. The Together Plan takes the uncertainty out of new-unit organization, and establishes deadlines that must be met.

One Together Plan option is to include only community organizations with common interests or functions, such as all United Methodist churches, all Hispanic organizations, or all business corporations. This uses a community organization's influence to bring potential chartered organizations with similar concerns and goals to one place at one time. People often respond more readily to groups with like interests.

This book will show you how to organize a Together Plan event for your council or district. The resource material and sample letters will be helpful in developing the event. All material can be reproduced locally.

What's in a Name?

For years, we have referred to a new-unit campaign as "together we organize" or, simply, the "together plan." You might have heard of the Bishop's Dinner, the Lutheran Dinner, or the Service Club Together Plan. Venturing calls the Together Plan method an "impact plan." Some councils call the campaign a Character Counts luncheon, Urban Emphasis dinner, or church conference. In short, councils should repackaging the campaign in language that fits the local situation. Whatever the name, any plan will be a version of the new-unit campaign described in this book.

Ingredients for Success

The Together Plan can be an exciting and satisfying experience for all who participate in it. Frontline Scouters who give many hours to council and district efforts can get a real lift from seeing a whole year's new-unit organization efforts accomplished in one neat and concentrated event. People recruited for this event gain such personal satisfaction from seeing *their* new unit start and flourish that they are receptive to becoming regular members of the organizing team.

Keys to success include:

- Recruiting quality volunteers to make the plan work
- Using influential Scouting supporters to invite and persuade prospects to attend the event
- Identifying and recruiting an interesting person to give a testimony as keynote speaker
- Carefully preparing and faithfully following the work schedule
- Developing publicity to create public awareness of the value of the Scouting program and the need to expand the opportunities to join

Quality Volunteers

A Together Plan requires organization and people in order to be successful. New individuals may need to be recruited for this assignment. They must be selected early and trained for their responsibilities. Essential people include:

1. A **Together Plan chair** who supervises volunteer recruiting, training, and report meetings, and is ultimately responsible for the completion of all assignments. The chair also secures **an event sponsor**, who will pay for the meal and related expenses.
2. An **arrangements chair** to ensure a top-notch location and provide support before and on the day of the event.
3. A **unit organizer** for each prospective chartered organization, who will work with the organization to establish the new pack, troop, or crew, and be absolutely sure that a new unit is solidly under the care of a commissioner before the unit organizer leaves the unit. Organizers are recruited by the district or council membership committee.
4. A **commissioner (council/district)** who works with the Together Plan chair in reviewing schedules and volunteer needs, assists with the Together Plan event, and provides unit commissioners to help ensure the success of each new unit. Volunteer requirements will be determined by the number of prospects invited to the Together Plan event. There should be a unit organizer for each prospective chartered organization attending the meeting.

Keynote Speaker

The right keynote speaker is key to ensuring a great turnout for the Together Plan event. The Together Plan chair and other planners should try to find a speaker from the invited organization(s) who is respected and influential enough that others in the organization would feel the need to honor his or her request to attend the event.

Preparation

Since the Together Plan event is a one-time attempt to recruit new chartered organizations, careful planning and preparation are required. At least three months will be needed to plan meetings and to recruit and train volunteers. Other preparations begin even earlier. The Work Schedule and Personnel Assignments chart can be used as a guide in preparing for your Together Plan event. The chart shows the minimum time required for each step in order to do a thorough job. Only scheduled checkpoints and deadlines are included in this chart; intermediate steps must be anticipated and carried out.

Publicity

A Together Plan is newsworthy. It creates awareness of the positive program of the Boy Scouts of America and of the widespread community support for the BSA. Therefore, your Together Plan event should receive good publicity through newspapers, television, and radio and chartered-organization newsletters. The Work Schedule and Personnel Assignments chart identifies with asterisks the items that should be publicized. This work schedule can be used by the Together Plan chair and steering committee to plan and develop the Together Plan event. The time line reflects completion dates for each step. The recommendation to hold the event may occur at the staff planning conference as much as 18 months prior to the event. Adoption by the district committee and inclusion in council and district calendars could occur as much as 12 months in advance.

Work Schedule and Personnel Assignments

	This work schedule can be used by the Together Plan chair and steering committee to plan and develop the Together Plan event. The time line reflects completion dates for each step. The recommendation to hold the event may occur at the staff planning conference as much as 18 months prior to the event; adoption by the district committee and inclusion in council and district calendars could occur as much as 12 months in advance.	Council/District Membership-Relationships Chair	Together Plan Chair	Commissioner (Council/District)	Unit Organizer	Arrangements Chair
-150	Determine new-unit needs and identify prospective chartered organizations.	X		X		
-140	District/council relationships steering committee meets to determine volunteer requirements.	X		X		
-120*	Recruit Together Plan chair.	X		X		
-120	Complete boy-fact surveys and potential chartered organization data.	X		X		
-100	Begin recruiting organizers and commissioners.	X		X		
-100	Appoint arrangements chair.	X	X	X		
-90*	Secure Together Plan event sponsor and keynote speaker.	X	X			
-75*	Secure location for Together Plan event.	X	X			X
-45	Complete recruiting of organizers and trainers.	X	X	X		
-45	Send invitations to unit organizers for the training meeting.		X	X		
-45*	Send invitations to heads of potential chartered organizations for the Together Plan event.	X	X			
-45	Promote the organizer training meeting.	X	X	X	X	
-40	Continue to follow up with organizers on obtaining organization commitment to attend the event; try to secure commitments for new units prior to the event.	X	X	X		
-30	Send Together Plan reminder letters to heads of potential chartered organizations and their representatives.		X	X		
-20	Fill gaps in the volunteer roster.		X	X	X	
-10	Make daily checks on organization responses to the invitation.		X	X		
-7	Check final event arrangements.		X			X
-5*	Conduct a saturation publicity campaign.	X	X			
-2	Make a final attendance check.	X	X	X		X
0*	The Together Plan event.	X	X	X	X	X
+1	Send follow-up letters to heads of new chartered organizations.	X	X	X		
+2	Send follow-up letters to heads of new chartered organizations.		X			
+2	Continue to follow up on organizers' progress.		X	X		
+25	Promote the first report meeting.	X	X	X		
+30*	Conduct the first report meeting.	X	X		X	
+35	Continue follow-up of organizers' progress.	X	X	X		
+55	Promote the final report meeting—victory celebration.	X	X			
+60*	Conduct the final report meeting—victory celebration.	X	X	X	X	
+61	Send thank-you notes.	X	X	X		

* To be publicized

Duties of the Together Plan Chair

Date	1.	Reviews schedule, new-unit needs, and volunteer requirements.
	2.	Leads organization committee in selecting and continually amending list of potential chartered organizations, securing boy-fact information, and preparing new-unit chart.
Date	3.	Determines organizer needs and assists membership committee in continual recruiting and follow-up efforts.
Date	4.	Selects the arrangements chair.
Date	5.	Works with arrangements chair to secure meeting place, and maintains check on progress.
Date	6.	Secures sponsor for event.
	7.	Plans the agenda for the training meeting.
Date	8.	Promotes and attends the training meeting.
	9.	Works with organization committee to follow up with organizers not present at training meeting. Delivers organizers' kits and review of procedures.
	10.	Conducts daily checks on potential chartered organization responses to organizers' visits.
	11.	Checks with arrangements chair to ensure that all preparations are complete for the Together Plan event or meeting.
	12.	Plans agenda for the Together Plan event or meeting.
Date	13.	Participates in the Together Plan event or meeting.
Date	14.	Sends follow-up letter to group chair of potential chartered organization.
	15.	Leads district organization committee members in follow-up of organizers' progress with each potential chartered organization.
	16.	Prepares agenda for first follow-up meeting.
Date	17.	Conducts first report meeting.
	18.	Follows up with organizers.
	19.	Plans final report meeting and victory celebration.
Date	20.	Conducts final report meeting and victory celebration.
Date	21.	Works with membership committee in preparing and sending thank-you letters.

Note: By inserting target dates in the spaces provided, a combination job description and work schedule can be developed. *Do the same for each of the job descriptions.*

Personnel Needed and Their Responsibilities

Campaign Chair

1. Meets with staff adviser and commissioner (district/council) for Together Plan event to plan and review the prospects for committee recommendations.
2. Gives continuing leadership to recruiting of quality volunteer organizers and trainers; makes assignments.
3. Appoints arrangements chair.
4. Secures Together Plan sponsor and keynote speaker.
5. Presides at campaign training meeting.
6. Sends invitations to heads of potential chartered organizations.
7. Presides at Together Plan event.
8. Sends thank-you letters to participants after the Together Plan event.
9. Continues to follow up on progress of new-unit organization.
10. Presides at final report meeting and victory celebration and presents recognition awards.

Commissioner (Council/District)

1. Meets with Together Plan chair and staff adviser to review schedule, new-unit needs and prospects, volunteer requirements, and selection of quality volunteers, unit organizers, etc.
2. Recruits new-unit commissioners to serve adequately the number of anticipated new units.
3. Promotes and assists with the training meeting, Together Plan event, follow-up meetings, and victory celebration.
4. Ensures that all new units have ongoing quality commissioner service.

Unit Organizer

1. Attends the Together Plan training meeting.
2. Visits the head of the prospective chartered organization to discuss concerns for children, youth, and families, and to gain a commitment to attend the Together Plan event with a minimum of three key people from the organization.
3. Meets the delegation from the prospective chartered organization at the Together Plan event, and serves as their table host at the event.
4. Makes sure that all 12 steps in organizing a unit are completed.
5. Attends the final report meeting and gives a progress report.
6. Makes sure the new unit is securely under the care of a commissioner before he or she leaves the unit.

Arrangements Chair

1. Recruits a committee to handle all physical arrangements for a successful event.
2. Secures a place for the Together Plan event and makes sure adequate facilities are available to handle guests and ensure a successful meeting.
3. Arranges for food service and a menu if the event includes a meal or refreshments.
4. Keeps records of responses by organizations and delegations to determine the final attendance.
5. Arranges for decoration of the meeting facilities to convey a Scouting atmosphere.
6. Assists at the dinner to ensure the meeting runs smoothly.
7. Attends to the convenience and comfort of the guests, meal service, and program needs (projector, VCR, or DVD player; lights; lectern; microphone; etc.).

Together Plan Organizers' Training Meeting Agenda

	Time
1. District Membership chair (or council vice president for relationships) Introduces Together Plan chair.	5 minutes
2. Welcome —Together Plan chair Introduce all present. Have each fill out roster card—name, address, telephone.	10 minutes
3. Distribute <i>New-Unit Organization Process</i> , No. 34196—Professional Scouter	
4. Review the 12 steps in organizing a unit.	40 minutes
5. How Scouting is organized —Professional Scouter Explain what the council and district do. Display large map of council and district.	10 minutes
6. Our opportunities for serving youth —Together Plan chair Review boy-fact survey results. Display map showing locations of potential chartered organizations.	5 minutes
7. The Together Plan event and how it works —Together Plan chair	5 minutes
8. What to do before the Together Plan event —Presentation by Together Plan chair Visit the head of the prospective chartered organization. Market the Scouting program. Discuss how Scouting can meet the youth-service needs of the prospective chartered organization. Convince the head of the prospective chartered organization to accept the invitation to attend the Together Plan event with three other members of the organization. Answer questions. Leave a reply card to be mailed by (date). On the day of the Together Plan event, call the head of the prospective chartered organization and arrange to sit with his or her group at a reserved table at the event.	15 minutes

	Time
<p>9. Take-home materials for organizers and prospective chartered organization</p> <p>Distribute organizer's kit, which includes</p> <ul style="list-style-type: none"> • Sample invitation to the head of the prospective chartered organization • Responsibilities of organizers • Tickets to the Together Plan event (six) • Reply card for the prospective chartered organization • Organizer's reply card • <i>Strengthening Organizations Through Scouting</i>, No. 522-023 <p>District or council membership chair's name, address, and telephone number—and a reminder to contact this chair as prospective chartered organizations are committed to the plan</p> <ul style="list-style-type: none"> • Together Plan event agenda • Table discussion guides (four) • Commitment cards • New-unit applications (two), No. 524-402 • Selecting Cub Scout Leadership, No. 522-500; and Selecting Quality Leaders, No. 522-981 • Youth membership applications (10), No. 524-406 • Adult applications (six), No. 524-501 • Follow-up letter to chair of organizing group 	10 minutes
10. Group discussion —Together Plan chair	10 minutes
<p>11. Closing announcements</p> <p>Announce the campaign event date, time, and location.</p> <p>Say thank you to attendees.</p>	5 minutes
Total Time	1 hour and 55 minutes

Responsibilities of Organizers

Before the Together Plan Event

1. Become familiar with all the literature in your kit.
2. Visit the head of the prospective chartered organization with a district executive, if possible, and sell the opportunity of serving youth through a Scouting unit. A letter from the Together Plan chair will precede your visit.
3. Though the head of the prospective chartered organization may not yet be convinced that the organization can operate a unit, get him or her to accept your invitation to attend the Together Plan event with three other members of the organization. Ask the head of the chartered organization to contact the other representatives personally.
4. Leave a reply card, to be mailed by (date).
5. Send in your report on this visit immediately, using the organizer's reply card.
6. On (date), call or visit the head of the prospective chartered organization to offer assistance and to make sure the reply card has been mailed.
7. On the day of the Together Plan event, call the head of the prospective chartered organization and arrange to meet the group and sit with them at their reserved table.

At the Together Plan Event

8. During the table discussion, continue selling the group on operating a unit. Once the commitment is made, review the unit organization plan in detail, and set up a definite schedule for following it. Complete the Table Discussion Guide.
9. Be sure the group understands that the responsibility for organizing the unit is now theirs, but that you, as council representative, will assist them in organizing the unit, along with the commissioner and training committee.
10. Have group chair present their reports at the end of the meeting.

After the Together Plan Event

11. Follow up on the progress of your prospective chartered organization through the unit organization plan, assisting until the unit is installed with a public ceremony. Ask for the organization chair's help, if needed.
12. Report progress at the first and second "victory dinner" meetings.
13. Make sure the new unit is securely under the care of a commissioner before you leave the unit.

Your prospective chartered organization is _____ .

Type of unit: _____

Head of prospective chartered organization: _____

Address: _____ Telephone number: _____

Scouting data on this organization: _____

Together Plan Dinner Program

6:30 p.m., Thursday, January 5

Middletown High School Cafeteria
PRESIDING—Together Plan chair

5 minutes	INVOCATION Clergyman
	PLEDGE OF ALLEGIANCE AND SCOUT OATH Scout
45 minutes	DINNER
10 minutes	GREETINGS AND INTRODUCTIONS Together Plan chair
10 minutes	“SCOUTING: IT WORKS FOR YOUR YOUTH” DVD District executive or volunteer
5 minutes	HOW SCOUTING HAS BENEFITED OUR ORGANIZATION Volunteer chartered organization
10 minutes	HOW SCOUTING CAN MEET YOUR NEEDS Keynote speaker
5 minutes	UNIT ORGANIZATION PLAN Professional Scouter or volunteer
25 minutes	GROUP DISCUSSIONS ON UNIT ORGANIZATION Introduced by district membership chair
15 minutes	REPORTS FROM REPRESENTATIVES OF PROSPECTIVE CHARTERED ORGANIZATIONS TO TOGETHER PLAN CHAIR Table standards of organizations that will operate units are brought to speakers' table along with commitment cards.
5 minutes	WE'RE WELL ON OUR WAY Together Plan chair Stress the importance of follow-up. Boys benefit only after units begin meeting.
2 hours and 10 minutes	

Table Discussion Guide

(Organizer presiding, assisted by commissioner)

- A. Have the group select a chair who would be willing to lead the organization project and be a potential unit committee chair.
- B. Discuss the *New-Unit Retention Guide*, No. 522-025.
- C. Complete as much of the “ownership” phase as possible tonight. (It is possible that some of the items have been completed prior to this meeting.)
- D. Fill out the following Report on Table Discussion.*

Report on Table Discussion

Organization _____

Address _____ Telephone _____

We elected _____ as our group chair.

Address _____ Telephone _____

Listed below are the items we completed tonight and the dates we will complete the remaining items.

OWNERSHIP

_____ Secure commitment from head of prospective chartered organization.

_____ Program adopted—action by governing body (if appropriate)—Chartered organization representative and organizing committee appointed; meet and receive instruction.

_____ Troop committee appointed.

LEADERSHIP

_____ Orientation meetings held for parents.

_____ Leaders selected; meet with committee and register.

_____ Leaders’ training in program planning.

_____ Program planned.

MEMBERSHIP

_____ Boys recruited.

_____ Troop meets—organized.

_____ Charter application completed.

_____ Troop installed and charter presented.

The following people were present at the table tonight and will continue on the troop organizing committee:

Name _____ Address _____ Phone _____

Name _____ Address _____ Phone _____

Name _____ Address _____ Phone _____

Organizer _____ Commissioner _____

* Copies to campaign chair, unit organizer, and chair of organizing group.

Together Plan Letters

Sample Invitation to Unit Organizers and Commissioners

[Together Plan Chair's Business or Personal Letterhead]

(Name)
(Address)
(City/State/ZIP)

Dear (Name),

You have been chosen for an important assignment!

We believe you can give significant leadership in helping organize a Scouting unit in your neighborhood. You were selected for this task by leaders in your community who know you.

We know your time is valuable, and we appreciate your willingness to give these few extra hours so young people in your community may have the advantages that Scouting offers.

This is to remind you of our training date (meeting date), in the (location). Your efforts will be recognized at a gala together plan event on (date), (time), at (location).

Thanks for your help.

Cordially yours,

Together Plan chair

Sample Invitation to Head of Prospective Chartered Organization

[Together Plan Chair's Business or Personal Letterhead]

(Name)
(Address)
(City/State/ZIP)

Dear (Name),

The young people of our community are important. Our religious institutions, homes, schools, and community organizations combine to influence their growth and development.

I accepted the chairship of an event designed to bring the fine influence of the program of the Boy Scouts of America to bear upon the lives of more of our young people. This great program for youth can reach them only through community groups and organizations such as yours.

We invite you to join other community leaders at a (dinner) meeting on (date), (time), at (location), to learn how your organization can become involved with the Boy Scouts of America and the young people in our community. A member of our committee will call on you soon to elaborate on the purpose of this meeting and to invite you to bring three or four persons from your organization with you as our guests.

An R.S.V.P. card is enclosed for your convenience. I look forward to meeting you.

Cordially yours,

Together Plan chair

Sample Reply Card for Potential Chartered Organization

Together Plan chair

The following representatives of _____ will join me at the Together Plan Dinner at 6:30 p.m. on Thursday, January 5, in the Middletown High School cafeteria.

Name

Address

Phone

1. _____
2. _____
3. _____
4. _____
5. _____

Signature _____

Address _____

Sample Organizer's Reply Card

Together Plan chair

I have personally visited _____ of _____ prospective chartered organization.

They will (will not) participate in our Together Plan event.

They will have _____ representatives at our Together Plan Dinner.

Date _____ Signature _____

Organizer

Sample Reminder Letter to Potential Chartered Organization

NATIONAL MANUFACTURING COMPANY OFFICE OF THE PRESIDENT

Mr. John J. Mills, Commander
Washington Post, American Legion
Middletown, OK 73480

Dear Commander Mills,

Just a reminder. You have a date Thursday evening, January 5, for the Scouting “growth program”
Together Plan Dinner.

It will be held at 6:30 p.m. in the Middletown High School cafeteria.

A table has been reserved for members of your organization. The program is short and will be worthwhile. It is designed to help you understand the value of Scouting to your organization and to the youth of our community.

We look forward to seeing you.

Cordially,

Together Plan chair

Sample Thank-You Letter and Victory Dinner Invitation

NATIONAL MANUFACTURING COMPANY OFFICE OF THE PRESIDENT

Mr. Arne Peterson
654 Michigan Ave.
Middletown, OK 73480

Dear Arne,

It was a great inspiration to be a part of the Together Plan Dinner at Middletown High School on Thursday evening.

The attendance, the caliber of the individuals, and their interest were outstanding. It was clearly a banner night for the future of our youth; and to each of you who did so much to make this meeting possible, many thanks and congratulations.

As an organizer, you now have the responsibility for assisting your assigned organization in forming its Boy Scout troop* that will serve our youth for many years to come. We are counting on you to follow through with this organization, assisting in following the plan of formation so the troop* will be chartered at an early date. The commissioner teamed with you will assist you until the unit charter is presented. If the progress in the formation of the unit slows, or if the members of our executive staff or our committee can be of any assistance to you in this project, be sure to call upon us. Together we will organize these additional units so more of our boys can participate in the Scouting program.

Again, my sincere thanks for your splendid cooperation.

Very sincerely yours,

Together Plan chair

P.S. Remember our report meeting on February 12 at the school and our victory dinner at the cafeteria on March 16. I'll be expecting you.

* Substitute Cub Scout pack or Venturing crew where appropriate.

Sample Follow-Up Letter to Chair of Organizing Group

**OFFICE OF SUPERINTENDENT OF SCHOOLS
MIDDLETOWN, OKLAHOMA**

Mr. John Doe
909 Lincoln Ave.
Middletown, OK 73480

Dear Mr. Doe,

Congratulations on being selected as the chair of the organizing committee that is going to form a (Cub Scout pack/Boy Scout troop) in the First United Methodist Church.

Our evening together on January 5 was a memorable one in the history of our district. It was a great inspiration to be a part of this fine group of 81 representatives of 17 organizations, meeting together with the common interest of making the Scouting program available to more and more of our boys.

Our district membership committee stands ready to assist you in carrying out your responsibility. We plan to have our organizer and other Scouters meet with you at the remaining meetings on your organization schedule so you can make your (Cub Scout pack/Boy Scout troop) a reality at an early date.

Sincerely yours,

Chair
Membership Committee Central District

Sample Final Thank-You Letter to Organizers

NATIONAL MANUFACTURING COMPANY OFFICE OF THE PRESIDENT

Mr. Sam Ross
495 River St.
Middletown, OK 73480

Dear Mr. Ross,

It was extremely gratifying to receive the reports last evening at our victory celebration.

There is a real sense of satisfaction in knowing that the efforts of individuals like yourself have resulted in 37 new Cub Scout packs and Boy Scout troops to date, and that more than 500 new members can now enjoy the Scouting program.

I know you feel satisfaction, too. You have been instrumental in guiding the development of a Boy Scout troop in your own organization that will serve boys for many years. And so the assignment you undertook is now completed. If you enjoyed the challenge and have experienced the kind of satisfaction that I think you have, I suggest that you might like to remain on the team and provide Scouting for still more boys. I know you will be contacted soon about a future assignment, and I'd like to encourage you to "stay aboard."

Again, thank you for the splendid cooperation you gave me, and for the opportunity you have provided the boys of our community.

Cordially yours,

Together Plan chair

Together Plan Event Checklist

For Organizers' Training Meeting

Display items:

- District map of chartered organizations
- Suitable room decorations, pictures, charts, etc.

Demonstration items:

- Registration: Roster list or cards
- "Scouting: It Works for Your Youth" DVD, No. 522-915
- Organizer's kit: Sample invitation to prospective chartered organization
- Together Plan event tickets (six)
- Reply card for potential chartered organizations
- Organizer's reply card
- Responsibilities of Organizers
- *Strengthening Organizations Through Scouting*, No. 522-023
- Together Plan event program

Literature:

- Table discussion guides (four)
- New-unit charter applications (two)
- Adult leader applications
- Selecting Quality Leaders, No. 522-981
- Selecting Cub Scout Leadership, No. 522-500
- Commitment cards
- Individual Cub Scout or Boy Scout applications for membership
- Follow-up letter to chair of organizing group

For Together Plan Event

Display items:

- Council map
- District map
- Placard (and stand) with institution's name, for each table
- Flags, posters, photos, and Scouting exhibits to dress up the meeting

Demonstration items:

- Set of cards to outline unit organization
- Large district new-unit chart
- "Scouting: It Works for Your Youth" DVD, No. 522-915
- DVD player and monitor (large screen if possible)

Literature for each potential chartered organization group discussion:

- Table discussion guide
- *Strengthening Organizations Through Scouting* (four), No. 522-023

If a Cub Scout pack is being organized, use:

- New Pack Organization Kit (three), No. 13-610
- Selecting Cub Scout Leadership, No. 522-500

If a Boy Scout troop is being organized, use:

- New Troop Organizer Kit (three), No. 18-990
- Selecting Quality Leaders (three), No. 522-981

MEMBERSHIP CAMPAIGNS

New-Unit Campaign Blitz Day

The New-Unit Growth Campaign Blitz Day is a focused effort to qualify new-unit prospects, make new-unit sales calls, and build relationships that create and maintain quality Scouting programs.

The purpose of the campaign is to engage volunteers in the process and organize new traditional Scouting units.

In a typical campaign, a block of two or three days is set aside for two-person teams to call on prospective chartered organizations. All professional staff, including all management levels, make these sales calls. The campaign starts with staff training, followed by an evening of training for volunteer new-unit organizers. The report meeting at the end of the campaign is also a victory celebration.

New-Unit Growth Campaign Blitz Day events can be scheduled with the professional support of area directors, in conjunction with the Membership Impact Department. The old Relationships Division's New-Unit Growth Campaign 2007–2008 document provides resources for planning and conducting blitz day campaigns, including sections on rationale, process, keys to success, backdating schedule, council staff orientation, training and blitz day schedule, mentor/manager task sheet, management team briefing, staff training, volunteer training, staff assignments and reports, prospect information sheet, assignment sheets, contact records, Scouting benefits, William D. Boyce scorecards, role plays, and survey worksheets.

The New-Unit Growth Campaign Blitz Day flier, No. 522-203, provides success stories from the Denver Area Council, Crater Lakes Council, Cascade Pacific Council, and Aloha Council.

With New-Unit Growth pilots conducted in Greensboro, San Diego, and Orlando in 2005–2008, councils and regions are teaming up for successful membership events.

The “Building an Effective New-Unit Growth Committee” seminar at the 2009 BSA National Annual Meeting presented successes in the Northern Star and Buffalo Trail Councils, and outlined best practices using structured sales calls, preparation, objections and benefits clinics, using market research, and following up with membership development and recognition with high-performing membership committees and commissioner services.

Structured Sales Calls

What is the structured sales call? It is a “planned conversation” to ... **Increase odds of success** ... and **decrease odds for failure**.

Structured sales call presentations have been given over 100 times and are based upon sales training programs in major corporations: IBM, Xerox, etc.

This program helps get team members up to speed quickly and able to make more effective calls on key executives in prospect organizations. Participants unanimously feel better prepared to call on key prospects and ask for important commitments.

Any effective sales call requires research and preparation. The call itself is a “planned conversation” in a set of elements that carry the conversation from start to finish. The elements are very apparent and easy to relate to. Understanding the elements provides greater control of the call, which in turn builds confidence and credibility.

Planned Sales Call Elements Evaluation Guide

Opening—Establish Rapport

- ☐ Introduce self and company.
- ☐ Ask open-ended questions.
- ☐ Use a common interest topic.
- ☐ Listen and key on response.

Create Interest

- ☐ State purpose of call.
- ☐ Present initial benefit statement.
- ☐ Review multiple initial benefit statements.
- ☐ Use appropriate references.

Establish Need

- ☐ Question openly for interest, needs, goals, etc.
- ☐ “Funnel” questions to needs you can fulfill.
- ☐ Quantify needs as appropriate.
- ☐ Restate and confirm needs.
- ☐ Summarize.

Presentation

- ☐ Overview of products.
- ☐ Use feature/advantage/reaction technique.
- ☐ Summarize needs/benefits.
- ☐ Ask buyer qualifying questions.

Close

- ☐ Use confident assumptive statement.
- ☐ Summarize important benefits.
- ☐ Ask for commitment.
- ☐ Wait.
- ☐ Present an action plan.

Objection Handling

- ☐ Listen and understand it.
- ☐ Get specific reasons why.
- ☐ Restate if needed (paraphrase).
- ☐ Soften, lessen the importance.
- ☐ Outweigh with product benefits.
- ☐ Verify objection was handled.

Region and area professionals have resources for working with councils to prepare membership campaign teams for successful events using structured sales calls. Best practices provide a set of features for successful sales calls.

Seven Features of a Successful Sales Call

1. Preparation for the Sales Call

- A. Does the potential chartered organization have any other community organizations?
- B. Any past Scouting history?
- C. Any Scouting involvement of employees?
- D. What is the mission of the potential chartered organization?
- E. Conduct a market analysis to determine the number of potential Scouts.
- F. Identify the key decision maker and the right team to make the call.
- G. Know “our case”; study the BSA benefits resources.
- H. Learn the chartered organization’s terminology.
- I. Anticipate potential objectives of the potential chartered organization.
- J. Prepare literature for sales kit.

2. Getting an Appointment With a Decision Maker

- A. Identify a clout person “door opener” to make the appointment.
- B. Consider potential objections before calling.
- C. Ask for 18 minutes; don’t sell on the phone.
- D. Obtain the secretary’s respect.

3. Learning About the Potential Chartered Organization

- A. Ask open-ended questions.
- B. Listen for key terms and key lines.
- C. Control the direction of the discussion.

4. Presentation of Scouting as a Resource

- A. Relate Scouting’s objective to the chartered organization’s.
- B. State our case.
- C. Stop selling when the prospect is sold.
- D. Conclude on time.

5. Overcoming Objections of the Chartered Organizations

- A. Listen and understand the objection.
- B. Restate if necessary.
- C. Give credit for the objection.
- D. Soften rebuttal; recognize the objection, but lessen the importance.
- E. Ask questions and keep the prospect talking with more specifics about his/her reason for objecting.
- F. Outweigh—give several benefits that outweigh the valid objection.
- G. Reverse—turn the objection into an advantage.
- H. Don’t argue or debate; stay cool, avoid emotion, and avoid the use of “I.”
- I. Reduce the objection from generalities to specifics.
- J. Don’t leave important questions hanging.
- K. The “door opener” can help here.

6. Closing the Sale

- A. Ask for a commitment to consider Scouting.
- B. Get commitment for next steps.

7. Follow-Up

- A. Thank the “door opener.”
- B. Thank the corporate decision maker.
- C. Arrange for a commissioner to attend the next meeting.
- D. Prepare materials for the Step 1 meeting.

EVENT PLANNING

Membership development is the result of well-organized membership committees, enthusiastic energy, and attention to detail, research, and follow-through. While the traditional Together Plan is designed to bring prospective chartered organizations to a single event, and the New-Unit Blitz is designed to send membership teams out into the field to visit prospective chartered organizations, another very valuable means of new-unit growth is through the development and strengthening of existing units.

Many councils host a range of events aimed at strengthening existing units through membership development or capital campaigns. This section provides an outline for event planning best practices, along with detailed steps for producing some of the supporting products.

Event Checklist

- ☐ Prospect list with giving history—ScoutNET report
- ☐ Design save-the-date cards
- ☐ Send out save-the-date cards 60 days prior to the event
- ☐ Guest list tracking spreadsheet
- ☐ Sponsor giving-level description sheets
- ☐ Sponsor and ticket thank-you letters
- ☐ Design invitations and response cards
- ☐ Send out invitations 30 days prior to the event
- ☐ Send out giving-level description and thank-you letters as gifts arrive
- ☐ Develop program journal:
 - Manage the deadline for logos and ads
 - Develop the biography for the guest of honor
 - Develop the content pages, including the state of Scouting, a Scout Law page, a list of event committee members, a list of the board of directors, and a list of Scouts who earned the Eagle Scout Award this year
- ☐ Manage the guest list, name tags, and table numbers.
- ☐ Manage the event:
 - Registration box, name tags, blank name tags, guest list, credit card machine and receipts
 - Flags
 - Gifts for honoree, their spouse, and the committee
 - AV—slide show of logos and personal photos of honoree
 - Program journals on seats
- ☐ After the event:
 - Thank-you letters
 - Audit event; spreadsheet to campaign management and data input into the ScoutNET prospect print selection form

ScoutNET Prospect List

Among the reports available in ScoutNET is a section that can provide a prospect list with giving history. This list is an important tool for managing support within the community of those who support Scouting. Unit growth flows from successful programs that capitalize on continued enthusiasm for continual growth of existing units, as well as the creation of new units. The process for extracting the ScoutNET prospect list is:

1. Go to "Program."
2. Click "Fundraising."
3. Double Click "Prospect Print Selection."
4. Select the desired campaign. For example, "FOS campaign."
5. Click "All Categories," "All BSA Structures," "All Positions," "All Workers," "All User Codes."
6. Click "All Status."
 - A. Place a minimum dollar amount (\$1) in the pledge area to get a list of all who have given to the event in the past.
7. Click submit, give it a title, and then click finish.
8. Scroll down to View Print Selections.
 - A. To have this file exported into Excel, highlight the file name, then click file (name it again) and click OK, and then exit.
9. Go to the Print Repository of ScoutNET. Under the ScoutNET menu, this is titled "Printing."
10. Click on the prospect file, click save to disk, and save it to the desktop.
11. Saved on desktop is an icon of a printer. Right click and select open with Excel.
12. The file will be opened with Excel, and a little cleanup will need to be done.

The prospect list provides a central repository for entering and extracting data for managing events, audit reconciliation, after-action reports, and performance metrics.

Guest List Tracking Spreadsheet

This spreadsheet is used prior to the event to track who has been contacted and when, if they have given and how much, and if a thank-you has been sent out for their donations.

Event Tracking Spreadsheet

Starting with a ScoutNET "prospect list" selection, format an event tracking spreadsheet that might include the following headers: Name, Company, Position, Address, Contact Number, Email, Giving Amount, Benefit Level, Thank You, Guest List, Notes.

After the Event

- ☐ Send thank-you letters.
- ☐ Audit the event:
 - Provide a final spreadsheet report to campaign management.
 - Provide a final spreadsheet to update ScoutNET prospect print selection.
 - Audit to ensure that all donations have been received and entered into ScoutNET.

MEMBERSHIP DEVELOPMENT

Community Alliances Team

Information about the Community Alliances Team can be found on the BSA's website at www.scouting.org. Click on Boy Scouts of America, Information Center, and Community Alliances. Or you can go directly to information at www.scouting.org/sitecore/content/Home/Media/Relationships.aspx.

The Community Alliances Team represents decades of work in building relationships with chartered organizations, new-unit development processes, policies, procedures, best practices, and extensive resources in many areas, including:

- The New-Unit Organization Process
- Letters of endorsement
- New-unit resource kits
- New-unit support resources
- Schools and Scouting: Working Together for Youth (PowerPoint presentation)
- The Case for School Access PowerPoint presentation
- 40 Developmental Assets
- W.D. Boyce New-Unit Organizer Award
- Training the Chartered Organization Representative

High-Performing Units

High-Performing Teams

Organizing Committee

District Commissioner
District Membership Chair
District Executive

Performance Process

Know Your Market

- ☐ Council Market Analysis Report
- ☐ Membership Reports
- ☐ Identify Chartered Organizations (Step 1)
- ☐ Family of Scouting
- ☐ New-Unit Commissioners
- ☐ Vision Statements

Measures of Success

Gold Standard

Market Share
14%

Unit Support Team

New-Unit Commissioner
New-Unit Organizer
Influential Scouter
District Training
District Executive

Build Your Team

- ☐ Know Our Partners (Step 2)
- ☐ Structured Sales Calls (Step 3)
- ☐ Chartered Organization Relationships (Step 4)
- ☐ The Organizing Committee (Step 5)
- ☐ Selecting Quality Leaders (Step 6)
- ☐ Training Unit Leadership (Step 7)
- ☐ Unit Program Planning (Step 8)
- ☐ Journey to Excellence
- ☐ Recognitions

Gold Standard

Commissioner Ratio
1:3

Chartered Organization

Institution Head
Chartered Organization
Representative
"Make the Call" Is a Chartered
Organization Resource.

Make the Call

- ☐ Building Blocks of Scouting
- ☐ Program Benefits
- ☐ Chartered Organization Relationships
- ☐ Chartered Organization Checklist
- ☐ Chartered Organization Representatives
- ☐ Tools of the Trade:
 - Online—Forms, Training, and Events
 - Unit Development and Youth Recruitment
 - Program—Ready to Use
 - Religious Emblems and Cultural Markets
 - Webelos to Scout

Gold Standard

Trained Leaders
40%

Unit Leaders

Unit Committee Chair*
Unit Leader*
Chartered Organization
Representative*
Unit Commissioner
Unit Committee
(Unit Key 3)*

High-Performing Units

- ☐ Recruiting Youth Members (Step 9)
- ☐ Unit Reporting Tools (Step 10)
- ☐ Successful Unit Meetings (Step 11)
- ☐ Charter Presentations (Step 12)
- ☐ Journey to Excellence
- ☐ UVTS 2.0
- ☐ Commissioner Annual Service Plans
- ☐ Unit Key 3 Begins Meeting.
- ☐ First Recharter
- ☐ Second Recharter
- ☐ Charter Presentation
- ☐ Unit/NUC Relationship Assessment

Gold Standard

Membership Growth
3%

Retention Rate
75%

Unit Visits Per Year
6

*These items originate from the 12-Step New-Unit Process with commissioner focus and new process terms.

Information about the new-unit organization process is available at www.scouting.org/scoutsource/Media/Relationships/TheNew-UnitProcess.aspx.

Environmental Systems Research Institute (ESRI)

Research and Evaluation provides councils with several different demographic reports that can be used to more strategically target membership efforts.

The Council Area Demographic Profile consists of four basic sections:

- A community tapestry profile of expected members
- A council area total available youth (TAY) analysis
- A council area penetration or density analysis
- A council area gap analysis

Community tapestry is a demographic segmentation system used by ESRI (Environmental Systems Research Institute), which is a company that specializes in GIS systems, mapping, and geo-customer analysis. There are 65 tapestry segments in the United States. These segments are characterized by household size, how they spend their money, how they spend their leisure time, and age. Every time you use a credit card or make a purchase and give your ZIP code, data about you feeds the databases behind the segmentation module.

Total Available Youth. The chartered organization analysis is a supplemental report to demographic package. The charts show current unit locations by type of chartered organization and the unit density in the council. On a map, the darker areas show higher density of units, for example: 22 percent to 35 percent of the available youth are in Scouting. The lightest blue is the area where the lowest percent of TAY is served. These areas tend to have few current chartered organizations and represent opportunities.

The **penetration analysis** is simply a density analysis that councils have done in the past. However, the difference here is that a penetration index is included that allows you to compare ZIP codes in your council area. For example, in ZIP code 01545 we have a density of 19.0 percent and a penetration index of 111, meaning families in this ZIP code are 1.11 times more likely to join than other families in the council. However, ZIP code 01568 has a 42.3 percent density, and families in that ZIP code are 2.48 times more likely to join than other families in the council area.

Gap Analysis. The gap is the difference between expected membership and current membership. Expected membership by ZIP code or census tract boundary based upon the tapestry segments in each area and the proportion of those segments that the council currently serves. As a simplified explanation, let's say that 30 percent of council membership is made up of "Up and Coming Families." In one ZIP code we have 100 households in that tapestry segment; therefore, we would have an expected membership of 30 youth in that ZIP code. So we have an expected membership of 30 youth, but we currently have only 10 members in that ZIP code. That leaves us with a gap of 20 youth members. This can become a main target population for membership marketing.

For more information about ESRI, go to www.scouting.org/FILESTORE/marketing/pdf/02-311.pdf

MEMBERSHIP RECOGNITION

Founder's Bar

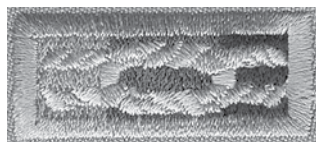


The Founder's Bar may be worn above the unit numerals as soon as the completed charter and money are officially received by the Scout office. The bar may be worn for as long as the unit numbers are worn. It may not be worn with any other unit numerals or by anyone whose name was not affiliated with the first unit charter.

The Founder's Bar may be worn by all youth and adults whose names are on a new unit charter or who officially join the new unit before the unit recharter for the first time. Members of veteran units still in operation who were on the original charter may also wear the Founder's Bar.

This recognition will emphasize both the importance and the pride of forming and nurturing a new Scout unit. While it does not guarantee the unit will become a Journey to Excellence unit, it does encourage multiple-year rechartering so one may continue wearing the bar. The bar will stimulate conversation and emulation by others. It will recognize the dedication and devotion it takes to start a new unit.

William D. Boyce New-Unit Organizer Award




The William D. Boyce New-Unit Organizer Award is presented to recognize volunteers who organize one or more traditional Scouting units. The award may be worn on the adult uniform. The award is a square knot placed over the three colors representing the three phases of our program—Cub Scouting, Boy Scouting, and Venturing.

The William D. Boyce pamphlet is one of the most complete references available to membership teams. These are some of the topics covered in this publication:

- Introduction
- Steps for Organizing a Unit
- Teamwork, Planning, and the Process
- Chartered Organizations and the BSA
- Scouting Benefits Organizations, Adults, and Youth
- Additional Scouting Resources Available to the Chartered Organization
- Overcoming Objections
- Selecting Quality Leaders
- Sample Presentation for Recruiting a Prospect
- Checking References
- Frequently Asked Questions
- Marketing Terms of the BSA
- Unit Organization Resources
- Sample Annual Charter Agreement
- Volunteer Scorecard
- Certification of Completion
- BSA at a Glance
- What Is Cub Scouting?
- What Is Boy Scouting?
- What Is Varsity Scouting?
- What Is Venturing?

Full Scout Family Organization Award


A pack, troop, and crew constitute the Full Scout Family. This award is presented to chartered organizations that offer all three for new or existing units. One unit commissioner serving three units in the same chartered organization would explain why the 3-to-1 commissioner ratio standard was developed in the BSA.





Commendation to

for serving youth through the
complete program of the
BOY SCOUTS OF AMERICA
to develop character, citizenship,
and physical fitness


YEAR


CUB SCOUT PACK


BOY SCOUT TROOP


VENTURING CREW

PRESIDENT



SCOUT EXECUTIVE



Prepared. For Life.™