



BOY SCOUTS OF AMERICA

Conducting a Pre-Capital Campaign Readiness Analysis

A useful and efficient step in the consideration of a capital campaign is a one-day council pre-capital campaign readiness analysis.

This initial consultation service is available to local councils at no cost through a special arrangement with several leading national fund-raising consulting firms. (Send pages 2 through 7 to the finance team at the address below.)

By submitting answers to key questions in advance and scheduling one full day of meetings with an experienced fund-raising consultant and your key council leaders, the council will receive a professional assessment of its readiness to proceed with a full feasibility study for a major campaign. At the end of this thorough, one-day, on-site visit, the consultant will identify for the council significant readiness issues and key action steps.

In the event that the analysis yields a recommendation to proceed, the council will have streamlined the pre-capital campaign feasibility study process through the early accomplishment of several fundamental activities. In other cases, the analysis may identify factors recommending against proceeding straight into a feasibility study, thus saving the council valuable time and resources.

For further information or to schedule this one-day council pre-capital campaign readiness analysis for your council, after consultation with your area director, call, fax, or write the finance team at the BSA national office.

Phone: 972-580-2339
Fax: 972-580-2486
Address: Boy Scouts of America
Finance Impact Department, S219
1325 West Walnut Hill Lane
P.O. Box 152079
Irving, TX 75015-2079

After completing this background questionnaire, make a copy of pages 2 through 7 and send the original to:

**Boy Scouts of America
Finance Impact Department, S219
1325 West Walnut Hill Lane
P.O. Box 152079
Irving, TX 75015-2079
Fax: 972-580-2486**

Return by: _____

Completed by:

_____ Name _____ Title

Date completed: _____

Pre-Capital Campaign Readiness Analysis Background Questionnaire

Council: _____

Headquarters city and state: _____

I. Council Preplanning Phase

A. Our council has officially adopted or is considering a capital and/or endowment campaign encompassing the following projects:

1. _____ \$ _____

2. _____ \$ _____

3. _____ \$ _____

4. _____ \$ _____

Total \$ _____

B. The following sources are anticipated in the financing package (with dollars and/or percentages estimated):

1. Fund-raising \$ _____ %

2. Funds-in-hand \$ _____ %

3. Borrowing \$ _____ %

TOTAL \$ _____

C. Our prior fiscal year (most recent) funding sources are as follows:

(List or attach the most recent year-end statement of public support, revenue, and expense.)

1. Friends of Scouting \$ _____

6. Income from endowment \$ _____

2. Direct mail \$ _____

7. United Way \$ _____

3. Special events \$ _____

8. Foundations/grants \$ _____

4. Product sales \$ _____

9. Activities \$ _____

5. Camping \$ _____

10. Project sales \$ _____

II. Council Fund-Raising History

A. List your top five gifts within the past 10 years (with the approximate or actual year each gift was received):

1. _____ \$ _____ Year _____

2. _____ \$ _____ Year _____

3. _____ \$ _____ Year _____

4. _____ \$ _____ Year _____

5. _____ \$ _____ Year _____

B. Past capital fund-raising campaigns:

1. Most recent capital campaign:

Year: _____ Goal: \$ _____ Actual amount raised: \$ _____ Number of gifts: _____

List the campaign's top 10 gifts (donor and amount):

- 1. _____ \$ _____
- 2. _____ \$ _____
- 3. _____ \$ _____
- 4. _____ \$ _____
- 5. _____ \$ _____
- 6. _____ \$ _____
- 7. _____ \$ _____
- 8. _____ \$ _____
- 9. _____ \$ _____
- 10. _____ \$ _____

2. Second most recent capital campaign:

Year: _____ Goal: \$ _____ Actual amount raised: \$ _____ Number of gifts: _____

III. Council Background

A. Provide the following information about your council:

Date founded: _____ Registered youth on December 31: _____

Youth served in the prior year: _____

Number of units: _____ Council grade (classification): _____ Number of districts: _____

B. Attach a list of your executive board and advisory board members.

C. How long has the current Scout executive been in place? _____

D. Is your council a Centennial Quality Council? Yes _____ No _____ If yes, how many consecutive years? _____

E. What is your endowment fund balance? \$ _____

F. Has the United Way been contacted about the proposed campaign? **CIRCLE ONE.**

Yes—Approved Yes—Preliminary approach only Yes—In process Not required No

G. What is the status on the council's debt position? (Includes accounts payable, notes payable, and long-term indebtedness)

1. How much? \$ _____

2. If yes, is there a written strategy to pay off the debt? Yes No

3. Does the council have a short-term/long-term/interfund loan? Yes No

4. If yes, is there a written strategy to pay down the loan debt? Yes No

IV. Campaign Key Personnel

A. List the names of key personnel and identify any specific issues that should be discussed with them:

1. Scout executive _____

2. Council president/chair _____

3. Staff member in charge of fund-raising _____

- 4. Council commissioner _____

- 5. Endowment chair _____

- 6. Properties chair _____

B. When was the council's most recent strategic plan completed? _____

(Please attach any documents relating to the current or most recent strategic plan.)

C. Does the strategic plan break down into annual tactical plans? **YES**____ **(Please attach, if YES.) NO**____

D. Has your council been involved with a merger or consolidation within the past 10 years? **YES**____ **NO**____

If **Yes**, please describe: _____

E. List any information you have about other recent capital campaigns by comparable organizations in your area:

Organization	Published Goal	Result	Year Completed
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____
_____	\$ _____	\$ _____	_____

F. Please **NOTE** or **ATTACH** any other information believed to be relevant (e.g., description of the geographic area served, list of council properties with a brief description of use and acreage, etc.).

V. Pre-Capital Campaign Construction Phase

- A. Have future attendance projections been validated by recent trends and do they justify the proposed expenditures to accommodate these projections? Yes ____ No ____
- B. Have all proposed projects been carefully budgeted with contingencies built in? Yes ____ No ____
Have they been prioritized? Yes ____ No ____
- C. Have the total fund-raising costs been calculated appropriately and factored into all projects, including administrative charge; marketing costs; and allocated staff salaries for Scout executive, development staff, recognition, rangers, and other internal staff required to be involved? Yes ____ No ____
- D. Has an allocation for increased operating costs been included? Yes ____ No ____
- E. Has an amount been calculated for future maintenance needs? Yes ____ No ____
- F. Does the council have a sufficient operational plan to execute the proposed initiatives? Yes ____ No ____
- G. Has the council set a policy in place for determining the percentage that needs to be raised before construction begins? Yes ____ No ____
- H. If the construction starts (included pre-construction costs such as permitting and architectural drawings), has a cash flow analysis been produced to demonstrate impact on council cash flow? Yes ____ No ____

VI. Accounting Guidelines for Your Council Capital Campaign

Does your accounting specialist have the following accounts set up for each project?
(See below.)

Yes _____ No _____

	Debit	Credit
Pledges	2-1303-xxx-00	2-4111-xxx-90
	Pledges Received	Contributions
	Capital Campaign	Temp. Restricted
Payments	2-1001-xxx-00	2-1303-xxx-00
	Cash Account	Pledges Received
		Capital Campaign

Year-End Close Effect		
<i>(Computer software does this automatically.)</i>	2-4111-xxx-90	2-3212-xxx-00
	<i>Contributions</i>	<i>Temporarily</i>
	<i>Temp. Restricted</i>	<i>Restricted Net</i>
		<i>Assets</i>

Year Projects Begin		
Cash Spent on Project	2-1841-xxx-00	2-1001-xxx-00
	Construction in	Cash Account
	Progress	

Upon Completion of Project: **Add asset to Fixed Asset Register**
(answer NO to the "Create Distribution for new Fixed Asset" question).

	2-18xx-xx-00	2-1841-xxx-00
	Fixed Asset Account	Construction in
		Progress
	2-3202-xxx-00	2-3201-xxx-00
	Unexpended Capital	Investment in Funds
	Fixed Assets	
	2-3613-xxx-00	2-3603-xxx-00
	Reclassified	Reclassified
	Capital Campaign	Capital Campaign
	Temporarily	Unrestricted
	Restricted	

VII. Council Capital Campaign Planning Phase Questions for Evaluation

Instructions: Check the boxes for the questions below (✓). Afterward, count the total number of boxes checked to determine council capital campaign readiness status.

A. Administrative and Financial Preparations

- Does the council need to file the necessary paperwork to conduct a capital campaign with the state?
- Current copy of 501(c)3 available?
- IRS 990 completed?
- Annual report completed?
- Have the regional and national offices been notified?
- Does the council have a written master properties plan for the use of camp facilities?
- Does the council have a board-approved gift policy?
- Does the council have a written case statement?
- Does the council operate with a balanced budget? (Current year)
- Do the council financial statements reflect an operating surplus or deficit last year?
- If the council carries a line of credit, is it at a zero balance?
- Does the council have a plan to secure building loans (if needed) and repay them?

Total number of boxes checked in section A: _____

B. Council Volunteers and Professional Support

- Does the council president make a leadership gift?
- Does the council board have 10 members or more of affluence, affinity, and ability to contribute?
- Does 75 percent of the council board contribute to FOS and/or other finance projects?
- Does everyone on the board approve the list of capital improvements?
- Does the board feel it is possible to reach the goal?
- Does the council have board members representing the community?
- Are there current board members willing to work on the campaign?
- Are there potential capital campaign steering committee members on the board?
- Will everyone on the board serve in an active role in the capital campaign?
- Is the Scout executive known and respected in the council?
- Does the Scout executive have at least 10 years of fund-raising experience?
- Is the Scout executive actively involved in his community in the chamber, service club, etc.?
- Is the Scout executive considered by his peers as a community leader?
- Does the council have a staff member responsible for fund development?
- If so, is he trained and a member of a professional fund-raising organization like AFP? Is he certified as a CFRE member?
- Will the professional staff be available to serve in the capital campaign in some capacity?
- Will the support staff be available to provide adequate administrative support?
- Will the campaign be conducted during a time when the staff is not overcommitted?

Total number of boxes checked in section B: _____

C. Fund-Raising Capabilities

- Does the council have an updated strategic plan for the five years?
- Is the plan updated regularly at executive committee or board meetings?
- Are the goals realistic and achievable?
- Has the annual giving campaign (Friends of Scouting) increased in the past two years?
- Does the council utilize other areas of fund-raising and operating support?

Total number of boxes checked in section C: _____

D. Public Relations and Marketing

- Does the council utilize a marketing committee, marketing professional, or consultants?
- Does the council have a marketing plan?
- Has the council ever done a market study?
- Has the council run local surveys to evaluate units' satisfaction and support?
- Has the council Key 3 conducted a fireside chat in each district?
- Are there support materials: brochures, audiovisuals, booklets, etc.?
- Does the council use a newsletter, online support, and/or e-mails to communicate to volunteers?
- Does the council submit press releases on a regular basis?

Total number of boxes checked in section D: _____

E. Prospect Giving and Recognition

- Does the council have one individual who could give the lead gift (10 percent of the overall capital campaign goal)?
- Does the council have a list of donors capable of making lead gifts?
- Does the council conduct prospect and evaluation meetings for prospects?
- Can the council identify its top 100 donors for a capital campaign?
- Is there a recognition program for capital campaign contributors?
- Does the council utilize donor cultivation?
- Has a feasibility study been conducted? If so, in the past two years?
- Has a market study been conducted to determine the other capital campaigns in the community?
- Has an architectural study been conducted to determine the appropriate costs?
- Has the council planned to incorporate an endowment component into the capital campaign?

Total number of boxes checked in section E: _____

Council Capital Campaign Readiness Analysis Results

Cumulative Totals

Number of boxes checked in section A: _____
Number of boxes checked in section B: _____
Number of boxes checked in section C: _____
Number of boxes checked in section D: _____
Number of boxes checked in section E: _____
Total number of boxes checked: _____

Council Score _____

Evaluation Results Formula

40–50 = Campaign is ready.
30–39 = Campaign is almost ready.
20–29 = Campaign is not ready yet.
10–19 = Campaign could fail.
1–9 = Campaign will fail.

Pre-Capital Campaign Readiness Analysis

Sample On-Site Schedule

AGENDA

Council: _____

Site visit date: _____ Prepared by: _____

Time	BSA Volunteer/Staff Member	Topics
9 A.M.–10:15 A.M.	Scout executive	<ul style="list-style-type: none"> • Council overview • Proposed campaign overview • Project details • Financing package • Volunteer leadership • Staffing issues • United Way • Learning for Life • Scoutreach
10:15 A.M.–11:15 A.M.	Staff member in charge of fund-raising	<ul style="list-style-type: none"> • Current fund-raising operations • Campaign history • Leadership gift prospects • Volunteer leadership
11:15 A.M.–noon	Council commissioner	<ul style="list-style-type: none"> • Volunteer readiness • Tactical issues (e.g., campaign's effect on unit programs)
Noon–1:30 P.M.	Ten to 15 volunteers (including properties and endowment chairs) and appropriate staff	<ul style="list-style-type: none"> • Discussion of proposed campaign • Campaign readiness assessment process • Review of top campaign prospects
1:45 P.M.–2:30 P.M.	Council president/chair	<ul style="list-style-type: none"> • Community perceptions • Board and staff readiness • Strategic issues • Volunteer leadership
2:30 P.M.–3:30 P.M.	Consultant analysis; phone consultation	<ul style="list-style-type: none"> • Analysis of findings • Flowchart of recommendations
3:30 P.M.–4:30 P.M.	Presentation of analysis and flowchart of recommendations to Scout executive and others	<ul style="list-style-type: none"> • Readiness for campaign • Value of pre-campaign study • Range of goal • Next steps

Fund-Raising Consulting Firms

These are the main corporate offices for several firms with experience in leading successful campaigns for Boy Scout councils.

Some have regional offices in various locations across the United States. There are certainly other good local and regional firms to consider in your selection process.

- **Kelley/Byrne Consulting Group**
19722 One Norman Blvd., No. 220-234
Cornelius, NC 28031
Phone: 704-892-3415; toll-free: 877-688-3415
Web site: www.kbcg.com
E-mail: bkscout1334@aol.com or Frank@kbcg.com
- **Bradley Associates Consultants**
3150 Almaden Expressway, Suite 204
San Jose, CA 95118-1253
Phone: 408-978-8400; toll-free: 800-671-1301
Web site: www.bacwest.com
E-mail: vince@bacwest.com
- **Ketchum**
Pittsburgh office
Three Gateway Center, Suite 448
Pittsburgh, PA 15222
Phone: 412-355-2379; toll-free: 800-242-2162
Fax: 412-281-9688

Dallas office
5151 Belt Line Road, Suite 900
Dallas, TX 74254
Phone: 214-866-7600; toll-free: 800-242-2161
Fax: 214-866-7751

Web site: <http://ketchum.viscarn.com>
E-mail: info@viscarn.com
- **Hartsook Companies, Inc.**
9320 East Central, Suite 200
Wichita, KS 67278-2890
Phone: 316-630-9992
Web site: www.hartsookcompanies.com
E-mail: tami@hartsookcompanies.com

Resources

Check the finance team Web site—www.fsd.org—for the most up-to-date fund-raising material, including sample foundation proposals, sample project sales requests, current finance publications, audiovisual products, and an educational seminar schedule. The following are books on capital campaigns often recommended by fund-raising experts. These books were selected from *The Non-Profit Handbook* and *The Chronicle of Philanthropy's* annual resource guide for charity leaders.

- ***Achieving Excellence in Fund Raising***, by Henry A. Rosso
Publisher: Jossey-Bass Publishers, 350 Sansome St., San Francisco, CA 94104; 800-956-7739
- ***Blueprint for a Capital Campaign: An Introduction for Board Members, Volunteers and Staff***, by Christine P. Graham
Publisher: CPG Enterprises, P.O. Box 199, Shaftsbury, VT 05262; 802-447-0256
- ***The Capital Campaign in Higher Education: A Practical Guide for College and University Advancement***, by G. David Gearhart
Publisher: National Association of College and University Business Officers, 2501 M St., NW, Suite 400, Washington, DC 20037-1308; 202-861-2560
- ***Capital Campaigns: 21 Ways to Reach Your Goal***
Publisher: Council for Advancement and Support of Education, 1307 New York Ave. NW, Suite 1000, Washington, DC 20005-4701; 202-328-2273
- ***Capital Campaigns: Strategies That Work***, by Andrea Kihlstedt and Catherine P. Schwartz
Publisher: Aspen Publishers, P.O. Box 990, Frederick, MD 21705; 800-638-8437
- ***Conducting a Successful Capital Campaign: A Comprehensive Fundraising Guide for Nonprofit Organizations***, by Kent E. Dove
Publisher: Jossey-Bass Publishers, 350 Sansome St., San Francisco, CA 94104; 800-956-7739
- ***The Successful Capital Campaign: From Planning to Victory Celebration***, edited by H. Gerald Quigg
Publisher: Council for Advancement and Support of Education, 1307 New York Ave. NW, Suite 1000, Washington, DC 20005-4701; 202-328-2273
- ***Successful Capital Campaigns: From Start to Finish***, second edition
Publisher: Stevenson, Inc., P.O. Box 4528, Sioux City, IA 51104; 712-239-3010