



BOY SCOUTS OF AMERICA®
FINANCE IMPACT



FOS CONFERENCE GUIDE

SUGGESTED AGENDA

Staff Training and Planning Conference

- | | | |
|------|--|--|
| I. | Opening Comments | Scout Executive |
| | Introduce council president, vice president finance, or council FOS chairman | |
| II. | Volunteer's Role in Financing the Council | Council President or
Vice President Finance |
| III. | Financing the Council | Scout Executive |
| | A. Review the budget and how it was developed | |
| | B. Sources of income | |
| IV. | Review Last Year's Enrollment | Assigned Staff Leader |
| | A. Dollars raised by each division and district | |
| | B. Analysis of giving levels | |
| | C. Organization | |
| | D. Personnel | |
| V. | This Year's Enrollment | Assigned Staff Leader |
| | A. Review council's campaign material | |
| | B. Council enrollment | |
| | C. District/division enrollment | |
| | D. Community enrollment | |
| | E. Family enrollment--preferred method | |
| | F. Plans for fireside chats | |
| | G. Campaign goals | |
| | H. Kick-offs | |
| | I. Victory celebrations | |
| | J. Brainstorm other strategies (e.g., vendor campaigns, project sales, product sales, foundation grants, etc.) | |
| VI. | Breakout Session | Every Staff Member |
| | A. Review campaign totals from the previous year and identify percentage of giving levels | |
| | B. List potential steering committee members and other key leaders | |
| | C. Review procedure and schedule for recruiting key leaders | |

Suggested Agenda Page 2

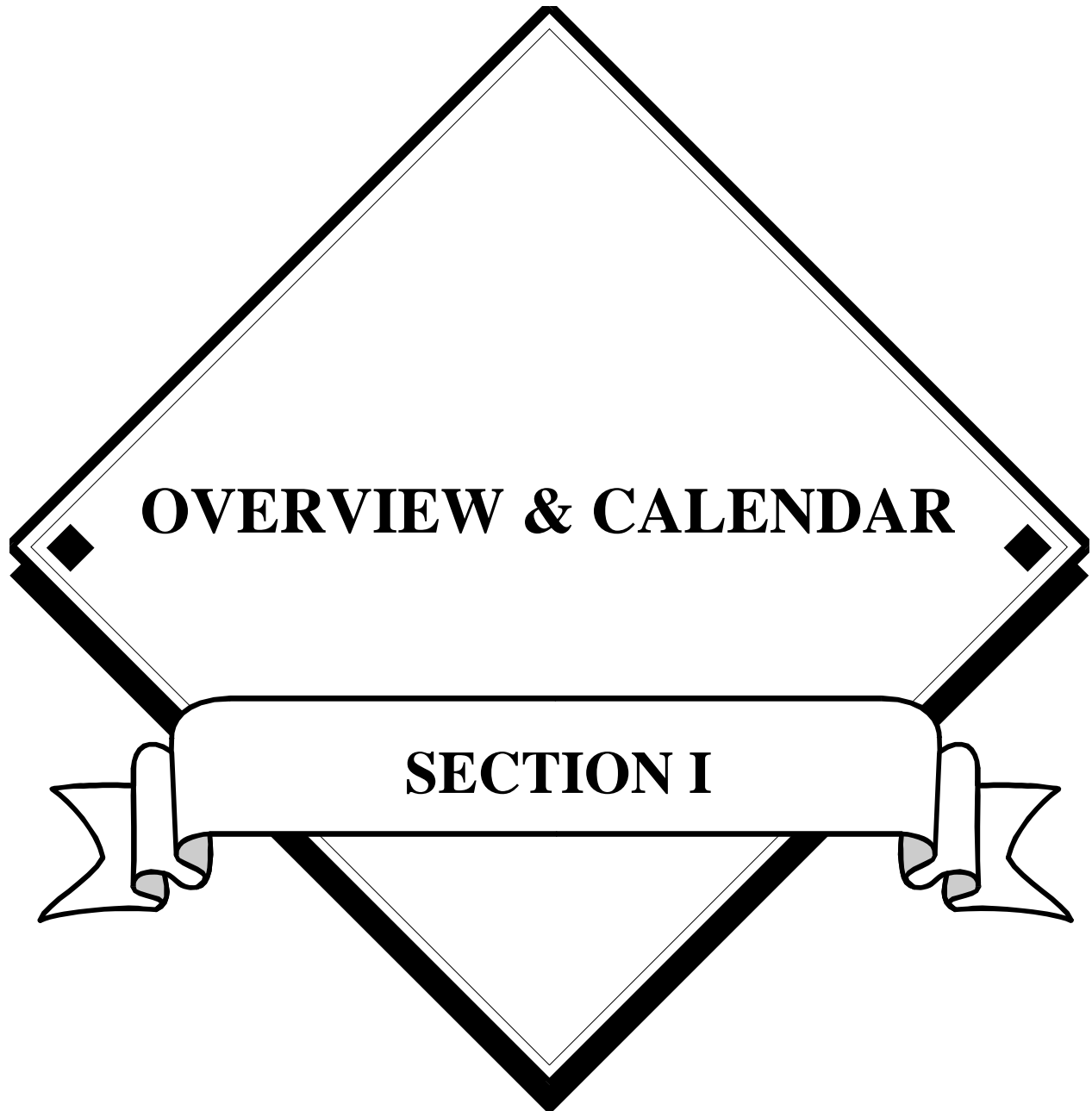
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|-------|---|------------------------|
| VII. | Reports of Breakout Session | Every Staff Member |
| VIII. | Selecting Key Leaders | Assigned Staff Members |
| | <ul style="list-style-type: none"> A. Identifying key leaders B. Role of the chairman C. Function of the steering committee D. Job descriptions E. Recruiting F. Calling on prospective leaders (use AV-05V001, <i>Executive Board Finance Orientation</i>) | |
| IX. | Identifying Prospects | Assigned Staff Members |
| | <ul style="list-style-type: none"> A. Who are prospects? B. Prospect cultivation | |
| X. | Prospect Evaluation
(Use AV-05V005, <i>Video Basics of SME/FOS</i>) | Assigned Staff Member |
| | <ul style="list-style-type: none"> A. How to upgrade levels of giving B. Prospect and evaluation meetings C. Gift range table D. Card assignment | |
| XI. | Campaign Controls/Discipline | Assigned Staff Member |
| XII. | Volunteer/Professional Relationships | Assigned Staff Member |
| XIII. | Closing Comments | Scout Executive |

References: Friends of Scouting Resource Manual, No. 35-802
 Executive Board Finance Orientation, AV-05V001
 Basics of SME/FOS, AV-05V005



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**PURPOSE AND OBJECTIVES OF
FRIENDS OF SCOUTING
CONFERENCE**

PURPOSE

The purpose for scheduling and conducting an annual Friends of Scouting campaign conference is threefold.

1. All professionals – whether they’ve been in 1 or 25 campaigns – should be refreshed and reminded about the essential parts and procedures in a successful FOS campaign.
2. To help focus on the one area that is vital to a Scouting program (and career), learn from fellow pros, team build, discuss, and have your questions answered about the council budget and your role in the council’s financial success.
3. Analyze last year’s campaign from top to bottom, take time to identify the best possible volunteer campaigners, schedule all key FOS dates, and mentally prepare for a disciplined and successful campaign.

OBJECTIVES

1. To come away with a better understanding of the principles and basic steps for an FOS campaign, including the dynamics of a council budget and how each service area is responsible for its fair share of that budget.
2. Emphasize the importance of a focused and well-disciplined campaign.
3. Have a better understanding of the total volunteer work force needed for an FOS campaign, and come up with at least two prospects for each key leadership position.
4. Schedule all dates and steps for the campaign (from training through reporting meetings), and each professional personally committed to keep this schedule.
5. Understand the importance of FOS to the council, and that the way to achieve 100 percent on-time campaign success is to **FOLLOW THE PLAN**.
6. Understand how to train and motivate dedicated volunteers, and give them the professional support they need to make them successful.



**BRING THE FOLLOWING ITEMS
TO THE CONFERENCE**

1. List of potential division chairpersons (have two or three prospects per division with their businesses, addresses, and phone numbers).
2. Prospect and evaluation plans by community. Bring resources for new prospects (newspapers, civic club rosters, unit rosters, country club lists, Internet research). Note dates, times, and places in your calendar.
3. Be prepared to ask questions and discuss issues encountered in past Friends of Scouting campaigns in your district.
4. Bring posted master lists of all divisions in your last year's campaign.
5. List of prospective majors and captains for each division, including name, name of business and unit affiliation, and phone number for the following positions:
 - A. 10 prospective majors (if general or special division)
 - B. 15 prospective captains
6. List of 30 prospective workers for each division. For example, if you have five divisions, you need 150 prospective workers' names, names of businesses, and phone numbers. (Remember, you can't have too many workers.)
7. List of potential steering committee members from your district and date of steering committee meeting.
8. Names, addresses, and phone numbers of your top three districts' FOS chairmen prospects.

FOS MASTER CALENDAR

<i>AUGUST</i>	<i>Council Staff Training</i>
<i>SEPTEMBER</i>	<i>First Council Steering Committee Meeting Recruit Council Divisions Enrollment Chairman</i>
<i>OCTOBER</i>	<i>Recruit District FOS Chairmen Planning Meeting</i>
<i>NOVEMBER</i>	<i>First District Steering Committee Meeting Recruit District Enrollment, Divisions, Community, and Family Chairmen Complete Council Prospect List Review Unit Rosters for Prospects and Leadership</i>
<i>DECEMBER</i>	<i>Advance Enrollment Fireside Chats Complete District Prospect List</i>
<i>JANUARY</i>	<i>Council's Divisions Kickoff District Enrollment Kickoff</i>
<i>FEBRUARY</i>	<i>Community Kickoff Family Enrollment Kickoff</i>
<i>APRIL</i>	<i>Victory Celebration</i>

COUNCIL AND DISTRICT STEERING COMMITTEE MEETINGS

***Minimum of Once a Month -- September/December
Minimum of Twice a Month -- January/Until Goal Achievement***

FOS DETAILED MASTER CALENDAR

Date	Council	District or Exploring Division	Responsible--Vol. & Staff	Attendance
August	Council Staff Training	Staff Training	Scout Executive Director of Field Service Director of Finance	Executive Staff
September	Recruit Council FOS Chairman and Council Steering Committee		Council President Vice President for Finance Scout Executive	
September	Council Steering Committee Meeting		Council President or Council Chairman FOS Chairman Scout Executive Director of Finance	Council President Council VP of Finance Council FOS Chairman Ten Top Area Leaders
September	Develop Public Relations Plan		Council Public Relations Chairman Assigned Staff Member	
September	Recruit Council Divisions Enrollment Chairmen		Council FOS Chairman Scout Executive	
September	Recruit District Campaigns Coordinator		Council FOS Chairman Scout Executive Director of Field Service	
October	Recruit District FOS Chairman		District Campaigns Coordinator Field Directors District Executives	
October	Recruit Chairmen: Founder Guardian Pacesetter Honor Distinguished Patron Benefactor Leadership Sponsor Century		Council Divisions Enrollment Chairman Scout Executive Director of Finance	

NOTE: Steering committee meets a minimum of once a month (September--December)

FOS DETAILED MASTER CALENDAR

Date	Council	District or Exploring Division	Responsible--Vol. & Staff	Attendance
October	Conduct Planning Meeting		Council FOS Chairman Scout Executive and Director of Finance	Council President Council VP, Finance Council Division Enrollment Chairman Division Chairman District Campaigns Coordinator District FOS Chairman Executive Staff
October		District FOS Planning Meeting	District Campaigns Coordinator Scout Executive and Director of Finance	Coordinator, SME Chairman District Chairman Related Executive Staff
November		District Steering Committee Meeting	District FOS Chairman Field Director District Executive	District Chairman District Finance Chairman District FOS Chairman Top Area Leaders Field Director District Executive
November		Recruit District Enrollment Divisions, Community, and Family Chairmen	District FOS Chairman District Steering Committee District Executive	

FOS DETAILED MASTER CALENDAR

Date	Council	District or Exploring Division	Responsible--Vol. & Staff	Attendance
November	Complete prospect lists in order listed: Founder \$50,000 Pacesetter \$25,000 Distinguished \$10,000 Benefactor \$5,000 Sponsor \$2,500 Guardian \$1,000 Honor \$750 Patron \$500 Leadership \$250 Century \$100		Division Chairman Scout Executive Director of Finance	Council Divisions Enrollment Chairman Selected Executive Board Members Selected Division-level Past Givers Council Steering Committee
November		District FOS Information Meeting	District Campaigns Coordinator District Executive Field Directors	District FOS Chairmen District Divisions Enrollment Chairman All Community Chairmen All Family Chairmen
November		Recruit Division Chairmen: Founder, Pacesetter, Distinguished, Benefactor, Sponsor, Guardian, Honor, Patron, Leadership, Century	District Divisions Enrollment Chairman District Executive	
November		Review Unit Rosters for Prospects and Leadership	District FOS Chairman Family Chairman District Executive	Family Chairman Key Volunteers District Executive
December	Recruit Team Members for Council Divisions		Division Chairmen, Scout Executive or Director of Finance	
December	Recruit Leadership Dinner Hosts		Division Chairmen, Scout Executive or Director of Finance	

FOS DETAILED MASTER CALENDAR

Date	Council	District or Exploring Division	Responsible--Vol. & Staff	Attendance
December	Advance Enrollment for Any Prospect Desiring Year-End Enrollment for Tax Advantages		Council Divisions Chairman Divisions Chairman Team Members	Team Members and Prospects One-to-One Basis
December	Fireside Chats (Earlier Scheduling)	Fireside Chats	Council President Scout Executive (District Executive--Planning Only)	Unit Leaders Unit Chairmen
December		Complete Prospect Lists for Founder, Pacesetter, Distinguished, Benefactor, Sponsor, Guardian, Honor, Patron, Leadership, Century	Division Chairmen District Executive	Division Chairmen Key Volunteers Field Director District Executive
December		Community Campaign Prospect Listing	Community Chairman District Executive	Key Volunteers District Executive
January	Kickoff--Council Divisions: Founder, Pacesetter, Distinguished, Benefactor, Sponsor, Guardian, Honor, Patron, Leadership, Century		Council Divisions Enrollment Chairman Division Chairmen Scout Executive or Director of Finance	Division Chairman Enrollers Scout Executive Director of Finance
January	Conduct Leadership Dinners		Council Divisions Enrollment Chairmen Division Chairmen Scout Executive or Director of Finance	Selected Prospects
January	Council Report Meetings Numbers 1, 2, and 3		All Chairmen, Scout Executive, or Director of Finance	All Enrollers Scout Executive Director of Finance

FOS DETAILED MASTER CALENDAR

Date	Council	District or Exploring Division	Responsible--Vol. & Staff	Attendance
January	Recruit Leadership	Division Chairmen District Executive		
January		District Enrollment Kickoff: Founder, Pacesetter, Distinguished, Benefactor, Sponsor, Guardian, Honor, Patron, Leadership, Century	Division Chairmen Enrollers for Each Division District Executive	Division Chairmen Enrollers Field Director
January		Leadership Dinners	Division Chairmen Enrollers for Each Division District Executive	Selected Prospects
January		Report Meetings Numbers 1, 2, 3, and 4	District Enrollment Chairman District Executive	Division Chairmen Enrollers Field Director District Executive
January		Recruit Majors (if Needed) for Community Campaign	Community Chairman District Executive	
January		Conduct Major Information Meeting	Community Chairman District Executive	Community Chairman Majors District Executive
January		Recruit Captains	Community Chairman Majors District Executive	
January		Captain's Information Meeting	Community Chairman District Executive	Community Chairman Majors District Executive
January		Zone Chairman Information Meeting	Family Chairman District Executive	Family Chairman Zone Chairman District Executive

FOS DETAILED MASTER CALENDAR

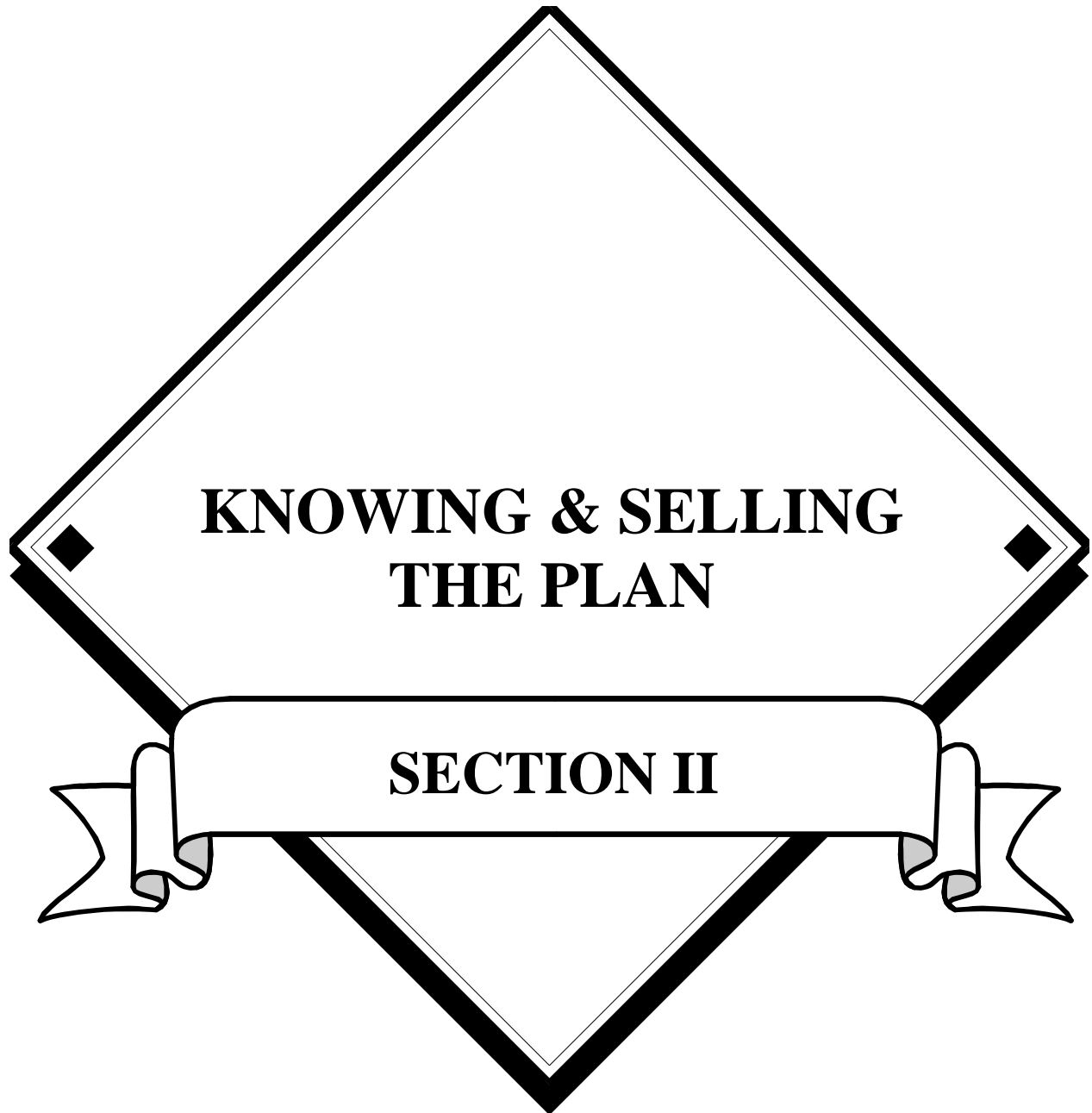
Date	Council	District or Exploring Division	Responsible--Vol. & Staff	Attendance
January		Recruit Neighborhood Chairman	Zone Chairman District Executive	
January		Neighborhood Chairman Information Meeting	Zone Chairman District Executive	Zone Chairman Neighborhood Chairman District Executive
February	Council Enrollment Cleanup		All FOS Personnel Scout Executive or Director of Finance	
February		District Divisions Cleanup	All District Divisions Personnel Field Director	
February		Community Kickoff	Community Chairman District Executive	Majors Captains Enrollers District Executive
February		Community Campaign Report Meetings Numbers 1, 2, 3, Final	Community Chairman District Executive	Community Chairman Majors Captains Enrollers District Executive
February		Unit Committee Meetings and Orientation Select Unit FOS Chairman Den and Patrol Team Members	Neighborhood Chairman	Neighborhood Chairman Unit Leaders Committee
February		Kickoff Family Enrollment	Family Chairman District Executive	Zone Chairmen Neighborhood Chairmen Unit Chairmen Team Enrollers

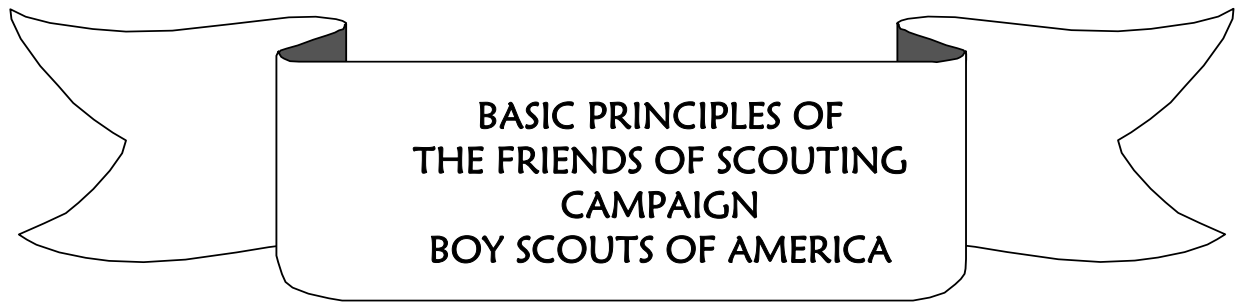
FOS DETAILED MASTER CALENDAR

Date	Council	District or Exploring Division	Responsible--Vol. & Staff	Attendance
February and March		Report Meetings—Family Numbers 1, 2, 3, Final	Family Chairmen Zone Chairmen Neighborhood Chairmen District Executive	Family Chairmen Zone Chairmen Neighborhood Chairmen Unit FOS Chairmen District Executive
March		Cleanup Community Campaign	All Community Campaign Personnel Field Director District Executive	
March		Final Cleanup Family Campaign	All Family FOS Personnel Field Director District Executive	
April	Final Cleanup and Reports		Council FOS Chairman Council President Scout Executive Director of Finance	
April	Victory Meeting	Victory Meeting	Council FOS Chairman Council President Scout Executive Director of Finance	All Enrollment Personnel Executive Staff

Time Line for Council Annual “Total Financing Concept” Strategy (Operating, Capital, Endowment)

Fund	3 rd Quarter			4 th Quarter			1 st Quarter			2 nd Quarter			
	July	August	September	October	November	December	January	February	March	April	May	June	
FOS	Prepare council campaign manual	Staff FOS training con-ference	Council and district campaign steering committee meetings Monthly – September through December Twice a month – January through April									Complete analysis of campaign giving and leadership	
			Select key council and district leadership		Select community chairmen	Select community leadership	Select Scout family leadership						
				Scout family fireside chats			Kick off council enrollment	Kick off Scout family enrollment	Enrollment continues	Complete ScoutFamily enrollment			
						Regular council and district report meetings				Victory celebration			
Phone-a-thons							Scout family phone-a-thons						
Matching Gifts							Corporate matching gifts						
Foundation Grants	Foundation grant proposal writing and submissions												
Direct Mail		Donor renewal mailing		Donor renewal mailing	Year-end cleanup mailing	Donor renewal mailing		(Donor acquisition mailing)		Renewal mailing to low-end donors	(Donor acquisition mailing)		
Project Sales							Project sales solicitation						
Special Events	Special events						Special events: distinguished citizen award dinner, luncheorees, auctions, golf tournaments, etc.						
Product Sales			Pr	oduct sales									
Budget Building					Executive board adopts revised budget for next year	Draft budget with staff & volunteer involvement		Executive board adopts planned budgeting model		Staff budgeting conference		Strategic budget plan	
United Way			Black out September through November (United Way relationships)					United Way preparation		United Way presentation			
Capital	(Foundation grant proposal writing and submissions)												
Endowment	Donor seminars		Donor seminars					Donor seminars					
	Charitable income trust emphasis (CRUT & CRAT)			Gifts of property Year-end gift emphasis				Gift annuity/pooled income fund emphasis			Wills and bequests emphasis		
			Heritage Society										
		Professional seminars				National major gifts seminar			National major gifts seminar		Professional seminars	National major gifts seminar	





1. Since its origin, the Boy Scouts of America has recognized the importance of gifts and contributions in support of local council programs. The BSA encourages and provides the opportunity for Scout parents, Scouters, and friends of Scouting to help meet the financial needs of the council.
2. The increase in available youth, expanded Scouting programs, increased costs, and lost or reduced United Way funding pose financial challenges for some councils. Operating budgets of local councils are provided through five basic sources:
 - A. Friends of Scouting campaigns
 - B. Income from trust funds
 - C. Project sales
 - D. Special events
 - E. Camping and activities revenue
3. Many donors continue to support Scouting through their local United Ways. An annual FOS campaign is for those friends of Scouting who have reasons and motivation to directly support our program above and beyond other gifts.
4. The Friends of Scouting campaign is extremely important for councils looking to build a permanent financial constituency. It brings individuals closer to Scouting, establishes a current financial base and benchmark for future funding, and provides a great opportunity to recruit personnel for all phases of the council's operations.
5. FOS gives donors the chance to support Scouting based on their interest and ability. Each prospect should be rated and asked for a contribution on the level of their potential.
6. The BSA recommends that Friends of Scouting campaigns be organized on a council, district, community, and neighborhood unit basis.



WHY FINANCE?

No organization can survive without adequate funding, and Scouting is no exception. There are camps to improve and to operate. A professional staff is needed for the support and guidance of volunteers. There is training to provide, activities to plan and operate, a service center to operate, and camps to operate. All these things are necessary to the movement's success and future – and they cost money.

WHO GIVES THE MONEY -- AND WHY?

“People give to people – not causes,” goes the old quote. On one level, that's true – but there's more to it. A more accurate statement would be: “People give to causes, but it makes a difference who asks them and how.” You must make a great case for supporting your cause, but you must have the right people ask – and ask the right way.

There are three primary sources of income: 1) the youth members; 2) the chartered institutions; and 3) the community.

The ninth point of the Scout Law is “A Scout is thrifty.” Scouts are expected to pay their own way and earn the money they need in support of unit activities. This money is used for Scouting expenses such as supplies and materials, camping equipment, and registration fees. The Scout also earns the money for his own uniform, personal gear, camp fees, and other needs. Many councils help offset the expenses for hardship cases and inner-city areas.

The institution that sponsors a pack, troop, or post helps its own unit by providing an adequate meeting place and necessary maintenance costs.

The council's financial support comes from the people who live in its districts. It comes from the parents of members, from Scouting's volunteers, and from community people who care about Scouting.

To meet the costs of its programs and services, the local council relies on income from gifts, Scout shop or trading post sales, special events, camp and activity income, and often the United Way. The executive board of the council is responsible for establishing a budget for the council's needs and operation. Scout councils do not receive government funds, nor do they receive the registration fees paid by the boys and adults. (*The registration fees are a source of income for the National Council, Boy Scouts of America.*)

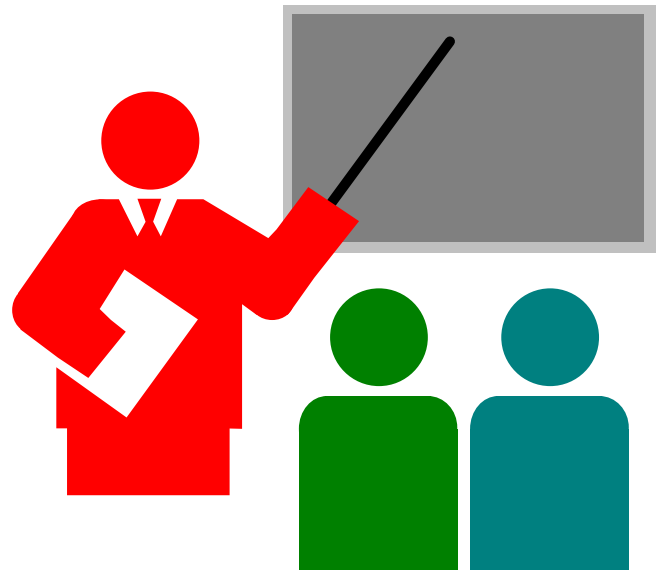
Each district or service area should be asked to provide its “fair share” share of the council's annual budget. It should be based on the number of boys in the program, the number of Scouting-age youth located in the area, professional service (the number of full-time employees serving the area), and the economic ability of the area.

SELLING THE FINANCE POLICIES OF THE BOY SCOUTS OF AMERICA

To many volunteers and supporters, the BSA's finance procedures and policies seem very different than those used by other organizations. True, Scouting is unique in many ways. But, more than likely, these policies and procedures may not have been adequately explained.

Explaining the case and the plan for local financial support of Scouting is a continual responsibility for the council. It involves selling the policy to the executive board members, and to the district and unit-level Scouters and parents. All are opinion makers in the council – they certainly all have opinions – and all are crucial to the council's financing.

Effective finance practices for Boy Scouts of America combine the “tried and true” – plans and practices used for almost 95 years – with more contemporary approaches that reflect a changing marketplace, greater competition for charitable dollars, and the rapid advances in technology and Internet strategies.



The Boy Scouts of America has the responsibility of making Scouting available to all boys. The local council, in accepting its charter, assumes this responsibility for its area. For a council to bring Scouting to all young people who want to be in Scouting, the council needs a realistic and comprehensive operating budget and a plan for raising the necessary funds to make that budget. The money is there – but professionals and volunteers must work together to find it and get it.

WHO PAYS FOR SCOUTING?

	WHERE DOES THE MONEY COME FROM?	WHERE DOES IT GO?
Youth	Personal Savings Participation in Money-Earning Projects	Uniforms Handbooks Personal Equipment Camp Fee
Their Units	Member Dues Special Money-Earning Projects	Camping Equipment Registration Fee* Boys' Life Magazine* Insignia Special Events Program Materials * after the first year
Chartered Organizations	Organization's Budget	Meeting Rooms, Light, and Heat
Your Council	United Way Organizations Friends of Scouting Campaigns Trust Funds Project Sales Special Events Bequests	Organizing Units Serving Existing Units Training Leaders Maintaining Camps Maintaining Service Center, Records and Information Professional Staff Supervision
National Council	Member Registration Fees Magazine Subscriptions and Ads Supply Division Uniform and Equipment Sales Grants National Service Fees	Local Council Assistance Program Research and Development Program Materials Professional Training Communications Local Council Insurance and Benefits



**WHAT DOES THE COUNCIL DO
FOR THE LEADER AND UNIT?**

TO HELP THE LEADER WITH ADMINISTRATION OF THE UNIT, THE COUNCIL MAINTAINS AND STAFFS A SERVICE CENTER TO:

1. Handle registrations, *Boys' Life* subscriptions, and special requests to the National Office and other organizations.
2. Maintain a supply of literature, insignia, forms, certificates, etc. needed by the leaders to carry on the unit's program.
3. Keep records of advancement, contribution, training, etc. necessary for unit operation.
4. Provide monthly minutes, agendas, etc. for district and council committees that develop programs for leader and unit benefit.
5. Handle phone calls and visitors related to unit operation and Scouting programs.
6. Provide, without charge, dozens of regular and special forms, applications, scoreboards, certificates, and literature helpful in unit program, and maintain an effective council Website to support volunteers, contributors, and youth members.
7. Provide district and council calendars and schedules with programs, kits, and special aids to assist leaders and their committees.
8. Make reservations for long- and short-term camps, camporees, jamborees, high-adventure bases, training courses, meetings, Cub Scout leader powwows, Exploring activities, equipment loans, annual council and district meetings, troop leader and den chief events.

TO ASSIST LEADERS, THE COUNCIL EMPLOYS A TRAINED FULL-TIME STAFF WHO COUNSEL, GUIDE, AND INSPIRE:

1. Through formal training and one-on-one counseling on unit relationships, administration, and operation.
2. Through guidance of all committees, commissioners, roundtables, meetings, conferences, courses, district and council activities in the development of programs that directly benefit leaders and units.
3. Through contacts with community resources such as clubs, churches, government, secure help for all units that they alone could not obtain (for example, use of parks, recreational areas, buildings for special affairs, picnic areas, campsites, and swimming facilities).



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**EXECUTIVE LEADERSHIP
AND KEY MEETINGS**

SECTION III



Every staff member must assume full responsibility as campaign director for his or her area of the campaign. Recruitment, training, overall direction, and final success of the campaign depends upon the management of each campaign director.

Effective executive direction takes place when:

- Influential leadership is selected (individuals with resources).
- Volunteers are recruited and trained within deadline dates.
- Prospect list is posted and kept up to date.
- Exact card control is maintained. All cards should be accounted for.
- Meetings are arranged properly and attendance is promoted.
- Calendar of events and work schedule are controlled.
- Contributors and workers are recognized promptly.

Volunteers can function efficiently and effectively only when the campaign director fulfills his/her responsibility of controlling all details required for a successful campaign.

Staff members must provide detailed preparation and follow-up for every aspect of the campaign. Nothing is left to chance. Providing guidance and support to volunteers and other staff members is a priority throughout the campaign. Staff members should be able to recommend two potential volunteers for every needed position.

The council must prepare a manual – a blueprint – outlining the campaign and how it's to be conducted. Manuals should include detailed checklists and specific aids designed for staff use. Every person, staff, and volunteer must understand the importance of staying on the plan and remember that there is only one plan.

An FOS staff training and planning conference should be held in late summer or early fall. Staff leaders should conduct a one-on-one weekly or biweekly review of what's needed for on-time, successful campaign completion. Discussions should focus on what is needed, and who can help do it. There's also a big difference between "following up" and "checking up."

To all staff members, remember: you set the example for how your volunteers fulfill their responsibilities, and how they define success.



***EXECUTIVE LEADERSHIP
Campaigning for Funds***

- You don't have a volunteer until you have a name, address, and telephone number. They must attend a briefing meeting, make a pledge, and show progress through positive action. Give key leaders a one-page job description with their objective, responsibilities, and key target dates.
- If help is needed, ask promptly. Discuss problems with your staff leader.
- Shortcuts don't work. Prepare and work from a checklist.
- Solicit pledges at every meeting. Everyone must pledge *before* asking others.
- Time waits for no one -- neither do we! Either they act within a week, or they are weak.
- Stay on schedule. When you get behind, you have a crisis.
- Do not assume anything!
- Pay close attention to upgrading levels of giving.
- Provide detailed direction and support to volunteers. Leave nothing to chance.
- When given a choice of dates, take the earliest possible one available.
- Place emphasis on selecting the best available leadership at all levels. Start at orientation of nominating committees.
- Prepare for every aspect of the campaign.
- Maintain effective campaign discipline.
- Emphasize training of volunteers and staff throughout the campaign.
- Follow-up frequently: this is not the same as checking up.
- Have one council plan and make sure that everyone knows to follow the council plan.

When someone says, “don't worry,” *worry*. Look for problems and take *immediate* action.



An important element of recruiting “top” campaign leaders is to inform them of their responsibilities.

When the person is being asked to serve in a key position, give them a written job description. The person is more likely to accept, perform better, and be more highly motivated if they know from the start what you expect, and have pertinent information about their position.

Job description should include:

- Title
- Campaign Dollar Objective
- Specific Duties
- Key Dates
- Name of Advisor

Job description should be limited to one page. Be realistic about what their responsibilities and time commitment will be, and use language and terms your volunteers can understand.

Sample job descriptions can be found in the BSA’s *Friends of Scouting Resource Manual* and the *FOS Campaign Manager’s Manual* available on the Finance Impact Department Web site.



1. In Friends of Scouting, you do not secure contributions, you sell contributions!
2. There are no shortcuts in raising money. Follow the plan.
3. As important as anything is our determination and desire to do the job.
4. You cannot sell another person until you have first sold yourself.
5. All workers, at all levels, must know what Friends of Scouting is all about.
6. Organize using the IC5 plan – one person is responsible for recruiting and/or soliciting only five prospects, and no more.
7. Work force – you haven’t recruited a worker until their name, address, and phone number are on a personnel enlistment form.
8. People give to people, but be certain the right person is calls on the right person.
9. In solicitations (especially larger ones), experience shows that two campaigners get three times as much as one campaigner.
10. Ask for a specific contribution. Don’t be bashful or apologetic.
11. Letters do not sell contributions or raise money in any way – do it face-to-face.
12. Telephone solicitations also limit your ability to get large gifts and sell Scouting, and they make it much easier for someone to say “no.” **There is no substitute for personal “asks.”**
13. The money is there and we will get it – if we follow these **TEN COMMANDMENTS**:

- Plan
- Recruit
- Organize
- Inform
- Train
- Sell
- Give Thanks to All
- Analyze Results
- Start Planning for Next Year
- Inspire

STEERING COMMITTEE

The steering committee's purpose is to give guidance and assistance to the council campaign and service area chairman in recruiting a district campaign chairman. When the district campaign chairman is recruited, the steering committee will help him recruit the community and division chairmen.

This committee should have five to eight members. It should include the district chairman, key board members, key Scouters, and wealthy influential/power structure community leaders.

The committee's responsibilities are concluded when all the leadership has been recruited. The campaign chairman and his community and division chairmen then form the steering committee to give direction to the campaign within the district.

STEERING COMMITTEE MEETING AGENDA

- I. Welcome -- Introductions
- II. Scouting Program -- Purpose, Aims, Structure and Record (use local facts)
- III. Scouting Needs -- Fair Share & Friends of Scouting Goal
- IV. Job of the Steering Committee:
 - A. Aid service area chairman in the recruitment of district campaign chairmen
 - B. Aid district campaign chairmen in the recruitment of divisional chairmen
- V. Review the type of person to recruit for campaign chairman
- VI. Campaign Leadership
 - A. Type of person to look for as chairman
 - B. Discuss potential persons for leadership of district campaign
 - C. Decide on number of 1, 2, and 3 choices for campaign chairman
 - D. Determine who will compose the recruiting team (three members)
 - E. Set date and time to recruit chairman
- VII. Other Business
- VIII. Adjourn

**RESPONSIBILITIES OF
VOLUNTEERS AND PROFESSIONALS**

VOLUNTEER

PROFESSIONAL

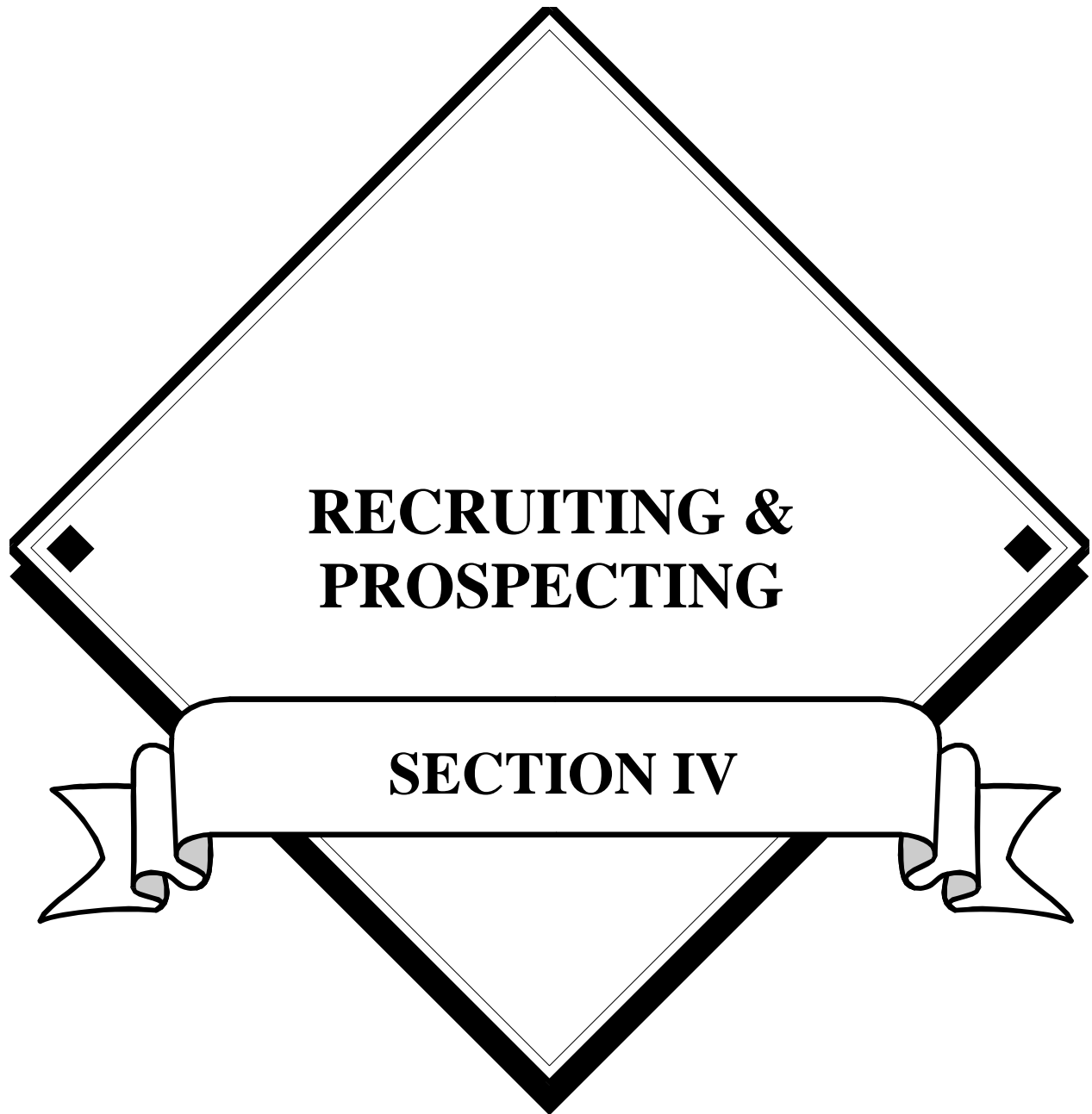
	RECRUITING	
RECRUITS		CONTROLS RECRUITING
	PROSPECTS	
IDENTIFY		ARRANGE MEETINGS & LIST THEM
	TRAINING	
TRAIN VOLUNTEERS		ARRANGE MEETINGS
	ENROLLING	
CAMPAIGN		KICKOFFS, REPORTS & CLEANUP
	RECOGNITION	
RECOGNITION		PLAQUES, CARDS & LETTERS, AND RECORDS
	LEADERSHIP	
CHAIRMAN		DIRECTOR



***CHECKLIST FOR DISTRICT
FOS TRAINING SEMINAR***

1. All division chairmen are recruited and attending.
2. Script is written and covered with district FOS chairmen at least five days before the training date.
3. Work up training booklets for everyone at training seminar. Personalize each booklet by name.
4. Cover reports, comments, invocation, etc. days before the meeting with those on the program.
5. Ensure meeting is in a nice, impressive location where a meal, etc. is provided. Make sure give-aways (key rings, etc.) are provided. Make sure these are available as gifts.
6. The following should be prepared at the meeting:
 - Name tags
 - Place cards
 - Meal taken care of by chairman
 - Order of place cards around the table
 - Small gifts for participants
 - Booklets ready and at place setting
7. Make sure program starts on time and lasts only one hour. Don't let the meal section go more than 20 minutes. Let the program begin while dessert is being served.
8. Make sure an American flag is available for the pledge as a part of the opening.
9. Make sure division chairmen's FOS cards are worked at the training seminar and collected.
10. Meet with each division chairman (if possible) before the training seminar, and cover the staffing needs and other basics so the division chairman is familiar with his/her job.
11. Use the training seminar as a motivational tool to kick off your FOS efforts. The entire group should leave the seminar determined to obtain any goal.







***KEY POINTS IN
RECRUITING AND ORIENTING
FRIENDS OF SCOUTING
CHAIRMAN***

- I. Steering committee identifies prospects.
- II. Steering committee identifies prospects for the recruiting team.
- III. Two volunteers and the district executive recruit – field director is included if the district executive is a new employee.
- IV. Two volunteers should be people prospects cannot say “no” to.
- V. Provide both volunteers with written bio information on prospect.
- VI. Script the recruiting plan, who says what.
- VII. You have:
 1. Job description and schedule
 2. Suggested personnel to recruit
 3. Overall organization chart
 4. Other support information depending on experience of prospect:
 - a. Information on why BSA has Friends of Scouting
 - b. Job description of personnel to recruit



***DISTRICT FOS CHAIRMAN
JOB DESCRIPTION (Suggested)***

- I. Give leadership and guidance to recruit the following chairmen by November 1.
 - A. District FOS Vice Chairman
 - B. Large Gifts Chairman \$1,000+
 - C. District Patron Luncheon Chairman \$500-\$999
 - D. Leadership Gifts Chairman \$250-\$499
 - E. Century Gifts Chairman \$100-\$249
 - F. Prospect and Evaluation Chairman

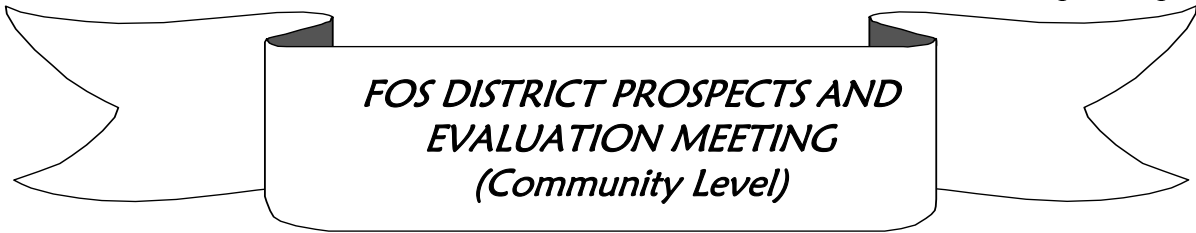
- II. Attend council orientation sometime in early November (**tentative**).

- III. Host district orientation meeting of all district division chairmen by November 30 (**tentative**).

- IV. Host regular district campaign report meetings to check progress of all divisions.

- V. Attend council wide report meetings to report your district's progress (December, February, March, and May).

- VI. Give leadership and assistance when needed to obtain Friends of Scouting's district goal of \$_____ by victory celebration (May - **tentative**).



I. WELCOME

Express thanks to those willing to help evaluate the prospects for the Friends of Scouting campaign.

II. WHY THE CAMPAIGN

- A. Council Finance Needs
- B. District Fair Share
- C. Community Share

III. PURPOSE OF MEETING

Importance of a good prospect list.

IV. *TYPES OF CAMPAIGN GIFTS

(Use only those used in your district)

- A. Large Gifts- \$1,000+
- B. Patron - \$500 to \$999
- C. Leadership - \$250 to \$499
- D. Century - \$100 to \$249

COMMUNITY GOAL

PROSPECTS NEEDED

V. PROSPECT AND EVALUATION PROCEDURE

A. Evaluate the prospects according to their financial ability to give if they were properly sold on Scouting.

B. Upgrade from the General and Leadership Division into one of the larger gifts divisions. Examine Large Gifts Division and determine if any prospects need to be moved down.

C. Add new prospects from the list below:

- | | |
|---|------------------------------------|
| 1. "New People List" | 6. Industrial plant management |
| 2. Associates of P & E Committee | 7. Country club rosters |
| 3. Telephone book (a must for non-United Way communities) | 8. New businesses |
| 4. Civic club rosters | 9. Chamber of commerce lists |
| 5. Banks - board of directors | 10. College and university alumni` |
| | 11. Any other source list |

All these lists are used to get people to think of the many possibilities. If they have no connection with Scouting or if no one knows them, they are not good prospects.

VI. THANK YOU AND ADJOURNMENT

Notes for district executive -- turn in to finance office:

- A. Evaluated Friends of Scouting lists (working copies)
- B. New prospects forms
- C. Put complete names and addresses of new prospects from all sources on prospect and evaluation sheets

*** These levels of contribution are to be used for evaluation purposes only.**

Prospecting Cub Scout Parents for Friends of Scouting

I. When

- A. To Be Done as You Process*
- B. Before the Friends of Scouting
Conference*
- C. Before Your P & E Meeting*

II. Where

- A. Cub Applications*
- B. Adult Applications*
- C. Parent and Family Talent Survey*
- D. NESR Roster*

III. Why

- A. Campaign Manpower*
- B. Contributions*
- C. Gifts in Kind*
- D. Parents Can Act as Liaison
Between Scouting and Business*



1. The division chairman, with the help of the district executive, needs to compile a list of:

Prospective majors -- call on the most capable people. First, in selecting prospective majors, consider getting geographic coverage and Scout unit coverage of the entire community involved. Look at team captains who did a good job last year.

2. The division chairman, with the help of the district executive, should then compile a list of:

Prospective captains -- begin with leftover names for majors. Every division in your district must hold a meeting of its majors to get them oriented and trained; they will then choose the prospective captains they plan to invite onto the team. The list of prospective captains should come from last year's good sales representatives.

NOTE: A major must be trained before they start recruiting their captains.

3. Next, the chairman, with the help of district executive and majors, will compile a list of:

Prospective campaigners -- begin with leftover names from captains. Every division of your campaign should hold a meeting of its captains to get them oriented and trained; they will then choose the prospective sales representatives they plan to invite onto their team. List should come from last year's workers, parents, and Friends of Scouting.

NOTE: A captain must be trained before they start recruiting their campaigners.

4. Staff member and division chairman will maintain a master list of prospective majors, captains, and campaigners and who they are assigned to. If additional names are needed, the volunteer can contact either the staff member or chairman for more prospects.

DEADLINES -- DEADLINES -- DEADLINES!!

From the very beginning, every leader in a division must be responsible for every person he recruits, committing him to attend the orientation, kickoff, and report meetings.

Carefully study all deadlines for recruiting the various groups of sales representatives. The recruiting schedule **MUST BE MET**.

INSTRUCTIONS FOR RECRUITING MAJORS, CAPTAINS, AND CAMPAIGNERS

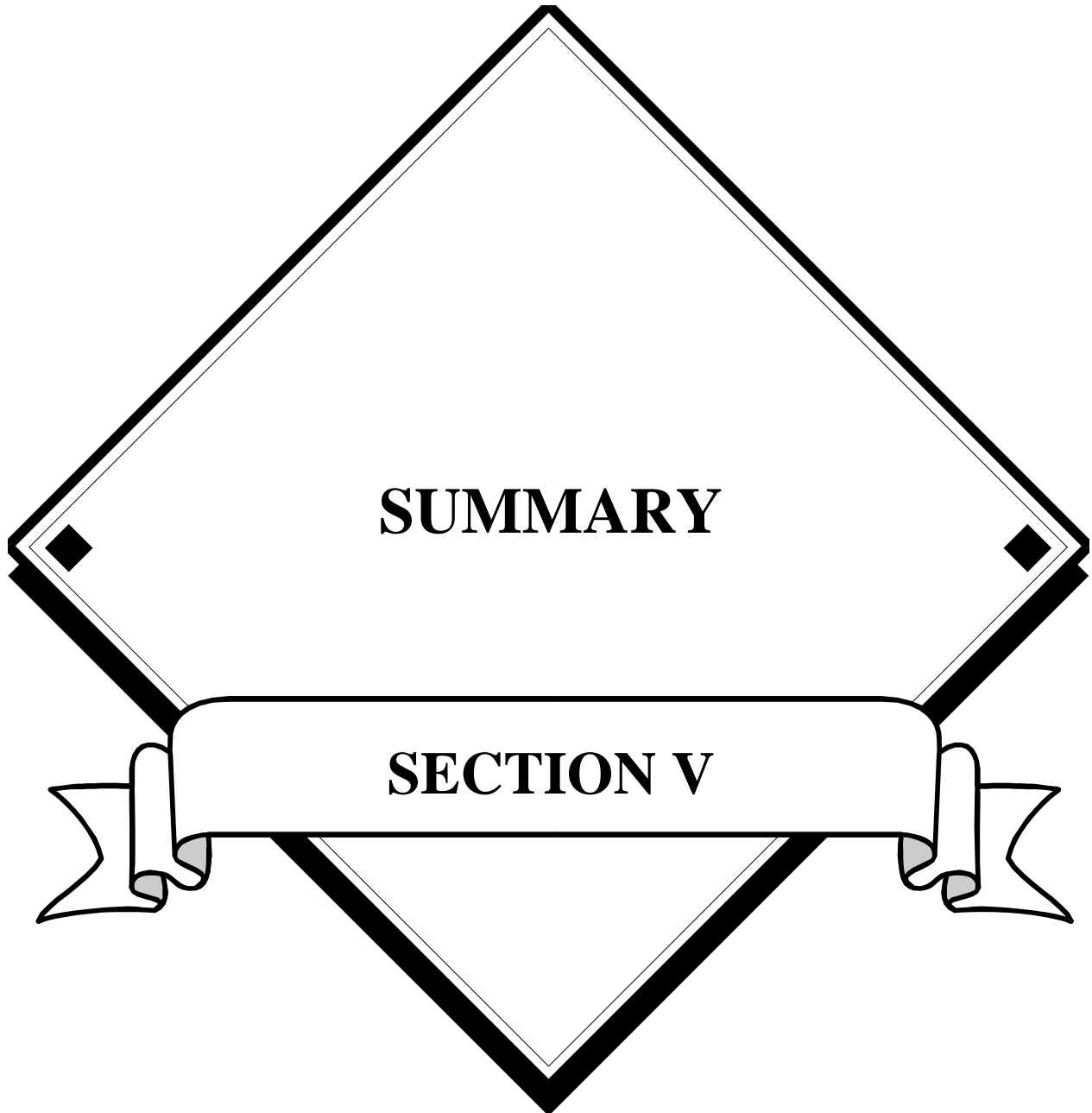
The following steps will help you make the most effective use of the prospective campaigners' list:

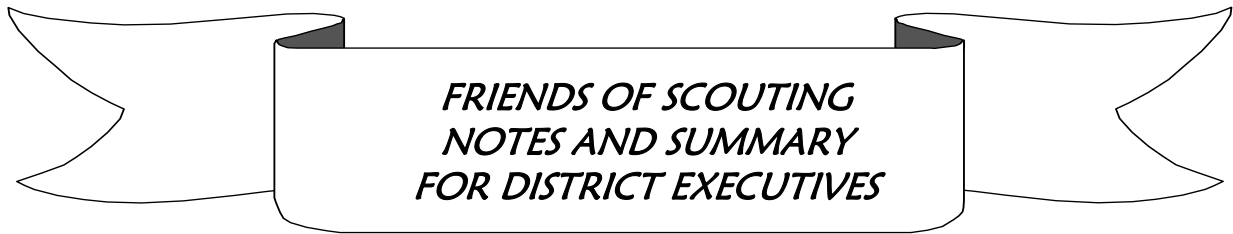
1. Carefully select the list of people who are potential campaigners from the prospect lists. Do a thorough job. These people should be prospects in their division. Make sure you include people with a flair for salesmanship. Look for "sales representatives" with the knack for getting their points across – and a love for Scouting – to tell other people about Scouting.
2. Prepare an alphabetized numerical list of prospect campaigners. Include name, place of business, and phone number.
3. Run off 25 copies.
4. The community campaign chairman uses this list in selecting majors and captains.
5. Your next use of the list will be when the captains are called together to select their campaigners. Give all captains a copy of the list, and give them two or three minutes to read all the names.

Then tell the captains something like this: "To save you a lot of time and trouble, we want to go around the room five times, and each of you will select five people who you will see and recruit as campaigners."

Start with the person on the left and have them call out a name he/she wants, go to the next person, and so on – around the room five times. Go around three more times – explaining to the group that they'll probably need some spares.

6. Now tell the captains, "We want you to agree that in the next 48 hours you will not ask any person to be a campaigner unless he or she is one of the eight you picked today." (The people then agree to this plan.)
Then say to the captains, "Now, after that 48 hours is over, the list is wide open and you can ask anyone you may want."
7. The captains will then leave this meeting with the motivation to see their people quickly. They know if they don't see them within 48 hours, another major has the right to ask them. They also know that the people they plan to see haven't been asked to be a captain (so there will be no duplication of effort).
8. Don't be concerned about "who picked whom" – this isn't important at this time. All you're concerned about is that you've marked off your master list any names that have been selected by one of the captains.
9. Occasionally a captain will call you about two or three hours after the meeting and say, "I've got two campaigners, but four have said no, and I need more names." You say, "Look at your list and tell me which other numbers you want." As he gives you these names, mark them off your master list, and he/she is then authorized to go ahead and contact these people.





I. PREPARE OURSELVES

- A. Understand how Scouting is financed: the boy, the unit, the council, the BSA, United Ways, annual FOS gifts, project sales, endowment gifts, trusts, foundation grants, and special events.
- B. Study the council program; the budget needs to meet this program.
- C. Know and be able to explain the need for a district executive.
- D. Recognize and assume your responsibility as a district executive to see that your service area provides the necessary financial support for the council program. Your attitude toward finance is the key factor in your success. Remember, you are “the” council; stand behind it – defend it.
- E. Before each campaign, make sure you understand the council plan and organization.
- F. Follow the established schedule in recruiting, organizing, kickoffs, and reporting and recording, and recognizing jobs well done.
- G. Make your pledge first.

II. RECRUITING CAMPAIGN PERSONNEL (Use the instructions for recruiting workers)

- A. Before recruiting begins, know the approximate number of prospects and dollar goals.
- B. Review last year’s campaign personnel to select the right people. Recruit individuals of stature, influence, and means. Are they dependable? Getting the right division chairmen will determine your success or failure.
- C. For every 100-150 prospects, you will need one major to recruit five captains. Each captain will recruit five campaigners who will enroll five prospects.
- D. Recruit your campaign personnel using the proper approach by the proper person and record personnel recruiting on the Personnel Enlistment Report form.
- E. When recruiting:
 1. Outline the job to be done. Do not under-sell the job.
 2. Get acceptance of the program, the organization, the schedule, and goal.
 3. See that each person is trained in their job and the steps they must take.
 4. Make sure they are committed to doing the job and working every prospect.



***FRIENDS OF SCOUTING NOTES FOR
DISTRICT EXECUTIVES (Continued)***

III. CAMPAIGN HINTS -- Do not take short cuts by eliminating steps – it will be the difference between a job well done and a job half done!

- A. Know and understand why each step is necessary. Be ready to defend the need for each step to your volunteers.
- B. Get ahead of deadlines. Try to stay on schedule, but at the same time, don't hold a meeting if you're not ready or don't have the necessary people recruited.
- C. Show a personal interest in each person working in the campaign. Make them successful and they will help you again next year.
- D. Have the facts about Scouting's success and sell them enthusiastically.
- E. Display your concern for the success of the campaign and the Scouting program. Have the division chairman make a statement of his concern.
- F. Use a prepared agenda for all meetings; review with chairman well in advance.
- G. Concentrate on high levels of giving. A \$100 contributor cannot effectively work a \$1,000 prospect.
- H. Hold cultivation meetings. This is one of the best methods of upgrading prospects to a higher level.

IV. BEGINNING AND BUILDING THE CAMPAIGN ORGANIZATION

- A. Have your district chairman select a district steering committee including board members, key district Scouters, finance committee, and other influential people.
- B. The district steering committee selects and assists in the recruitment of a district FOS chairman. The FOS chairman will recruit a community campaign chairman for each community and division chairman as needed. To do their job more effectively, they may appoint one or more vice chairmen. Success or failure can be determined here.
- C. The community chairman selects and recruits the following chairmen: Large Gifts, Patron Gifts, Leadership Gifts, and Century Gifts.
- D. The district campaign chairman conducts a training seminar for all community or neighborhood chairmen and their division chairmen. All organization and kickoff dates are confirmed.
- E. District executives must make sure that each chairman knows his job and the plan.



**FRIENDS OF SCOUTING NOTES
FOR DISTRICT EXECUTIVES
(Continued)**

V. **STEPS TO SUCCESS** (The following are essential steps to organize a campaign division and to enroll a maximum of 780 prospects.)

A. Step 1 – Chairman recruits and meets with his majors for orientation. Each major must be the same top-caliber level of person as the chairman.

MAJORS' ORIENTATION

1. Explain Boy Scout program, budget and Friends of Scouting. Review the area to be covered, and the Scout units in this area.
2. Explain major's job. (Each major will be responsible for about 150 prospects.) Then distribute major's responsibility sheet.
3. Explain organization to be used: "Magic 5" majors, captains, campaigners.
4. Determine schedule for organizational steps, kickoffs, and reports.
5. Give each major a goal to work on:

Example:	Division goal	\$5,000
	Five majors	\$1,500 each
	Captains	\$500 each

6. Help majors select prospective captains from a source list. Let each major choose more prospective captains than he needs. District executive records these lists. Majors have one week to recruit captains.
7. Majors will need to recruit captains who will follow the plan and participate in each step, and be responsible for making sure the captains do their job.
8. Explain the importance of the major's participation in each step.
9. Captains are expected to attend two training and organizational meetings, the kickoff meeting, and report meetings until their job is completed.
10. If the majors can't attend the two organizational meetings, the kickoff meeting, and report meetings, now is the time to change the dates or majors!
11. Chairman is responsible for getting majors to meetings.
12. Chairman solicits his major's campaign if they have not already pledged.
13. Major is instructed to turn in his list of actual captains recruited two days prior to the captain's orientation meeting, and to call his captains before each meeting to ensure their attendance.



***FRIENDS OF SCOUTING NOTES FOR
DISTRICT EXECUTIVES (Continued)***

B. Step 2 – Captain’s Orientation Meeting (All majors and captains attend.)

1. Explain Boy Scout program, budget, and Friends of Scouting.
2. Explain captain’s job (each captain will be responsible for approximately 20-25 prospects). Distribute captain’s responsibility sheet.
3. Explain the campaign organization: “Magic 5” majors, captains, campaigners
4. Confirm schedule on organizational steps, kickoff plans, and reports. (Sell hard the importance of the second captain’s meeting.)
5. Help captains select prospective campaigners. Let each choose from a source list more than they’ll need. The district executive records these lists and captains have 24 hours to recruit the campaigner. Then the list is wide open.
6. Explain the importance of captain’s participation in each step leading up to kickoff. (Also the importance of having his five workers recruited before the prospect selection meeting.)
7. Emphasize the importance of all majors, captains, and campaigners attending the kickoff.
8. If captains feel they cannot recruit their campaigners or take part in the necessary steps, now is the time to change.
9. Majors solicit their captain’s pledge.
10. Help majors who don’t have at least five captains recruited. Have chairman stay after the meeting or get with him later and make sure he gets his team captains.

C. Step 3 – Prospect Selection Meeting (All majors and captains attend.)

1. Captains report on salesmen recruited (Turn in names and addresses to Scout office.)
2. Assist any captain that has not recruited his campaigners. Review prospective campaigner's list.
3. Captains select the 20-25 prospects that his team will enroll. Prospect numbers are recorded as selected on prospect selection form. District executive keeps all cards in his possession until the kickoff. This is a must; otherwise, no one will show up at the kickoff and all the enthusiasm will be lost.



***FRIENDS OF SCOUTING NOTES FOR
DISTRICT EXECUTIVES (Continued)***

4. If captain is absent, his major selects his cards. (Pre-assign all cards by teams.)
5. Re-emphasize the importance of each captain doing their job by:
 - a. Enrolling all their selected prospects, including their campaigners.
 - b. Getting all their campaigners to the kickoff.
 - c. Following through with reporting and cleanup.
 - d. Reaching their team's goal.
6. Majors solicit any captains not previously pledged.
7. Secure attendance commitments from captains.

D. Step 4 – Kickoff Meeting (All chairmen, majors, captains, campaigners attend.)

1. The kickoff should be a formal, well-planned, and highly promoted meeting.
2. The chairman coordinates and presides at the meeting.
3. Teams are seated together by majors and captains.
4. Decorations and Scouting displays should be used.
5. Scouts and Explorers can help with registration program, serving, etc.
6. The meeting should include fun, instructions, and inspiration. Use a well-spoken Scout or leader to make an inspirational talk.
7. Use suggested kickoff agenda and make sure each person understands his program assignments well in advance of the meeting.
8. Captains solicit their campaigners with the chairmen, inviting everyone to participate.
9. Majors and captains distribute cards and materials to their teams.
10. The district executive takes care of supplies and campaigners' kits. (An explanation of all materials is required.)
11. Secure the three copies of the checkout forms from everyone who takes prospect cards. Make sure captains' and majors' names are on bottom of checkout slip. Give them their copies. Sort your copies (white original) alphabetically, by major, by captain, for ease in posting later results and developing written reports to send.



***FRIENDS OF SCOUTING NOTES FOR
DISTRICT EXECUTIVES (Continued)***

E. Step 5 – Reporting Results

1. Set report meetings early. The chairman, majors, and captains should attend. First one should be the day of or the day after the kickoff.
2. Audit chairman audits reports.
3. Make the report meetings appealing; luncheons are usually well attended by captains and majors and are a good promotion tool.
4. Mail written reports from chairman to all campaign personnel at least every other week.
5. Hold report meetings until all prospects are enrolled; get chairmen to make telephone calls to people with cards before and during report meetings.
6. Captains and majors are responsible for unworked cards assigned to their team.

F. Step 6 – Recording Results

1. The district executive must understand the system.
2. Results must be audited.
3. Master lists are posted. Checkout slips are posted.
6. Chairman, majors, and captains are kept informed on progress and problems
7. Cash or checks must be attached to respective pledge cards.
8. Written reports should be mailed out weekly between report meetings.

G. Step 7 – Recognition

Follow through with appropriate recognition for jobs well done. This will make it easier to recruit next year

H. Communicate

1. Maintain constant contact with your FOS chairman, providing him with weekly written progress reports.
2. Your FOS chairman and district chairman should also receive copies of overall Friends of Scouting reports that are produced every other week.
3. Do not try to hide weaknesses from your volunteers. They will rally to help if they are aware of needs.



I. Matching Gifts

Nationwide, there are corporations and companies that offer matching gifts programs to their employees. Take time to research your council's territory and find out who they are. It will pay off.

A. For more information, and access to current matching gifts databases, visit the Finance Impact Resources are on MyBSA.org. You will find research instructions for:

- 1. Foundation Center**
- 2. Wealth Engine**
- 3. IWave**

To obtain the login names and passwords for the 3 Web sites above:

- Log In to **MyBSA**
- Go To **Resources**
- In FID gadget on the left, click on **Finance Impact Department**
- Click on the **Research** link and print the instructions or download them to your computer.