

District Finance Committee Guide



BOY SCOUTS



OF AMERICA®

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Finance is an important responsibility of the council and its districts—one of the four major functions that every council must fulfill in order to provide successful Scouting within its boundaries. These four functions are described more fully in two basic references: *The Council* and *The District*.

Key Changes in This Printing

Updates in this manual are marked with “UPDATE” at the top of the page and have been made since the last printing of June 2006.



Financing within the district is directed by the district finance committee using the council plans, procedures, and policies as determined by the local council finance leadership.

The District Finance Committee

Financing within the district is directed by the district finance committee using the council plans, procedures, and policies as determined by the local council finance committee. The district finance committee chairman provides administrative leadership for the district finance program. The district finance committee chairman is a member of the council finance committee.

\$Major Tasks of the Finance Committee.

A district finance committee does the following:

1. Obtain and understand the district's portion of funds to be raised toward the council budget.
2. Organize and carry out a successful Friends of Scouting annual campaign in the district, and meet the goal by the target date.
3. Assist the council in raising funds toward the "project selling" program.
4. Promote the council plan for endowment development.
5. Support and cultivate a cooperative relationship with the local United Way.
6. Implement council finance policies within the district.

7. Inform units of unit finance policies.
8. Support district activities that involve income and expense by ensuring proper money management.
9. Provide recognition to donors, along with information on how their dollars helped serve youth.

\$Committee Assignments. The district finance committee includes the following subcommittee chairmen and members as needed:

Scout family, Friends of Scouting subcommittee recruits leadership and steering committees, helps interpret council services to units, and coordinates the campaign in the district. Committee members are charged with implementing the council plan for the district.

Product sales subcommittee has volunteers who are knowledgeable of unit operation and salesmanship. They promote and administer the council product sale with the units within the district.

Unit money-earning and policy subcommittee includes people to review Unit Money-Earning Applications and also interpret the BSA finance policies to unit leaders as well as district volunteers.

Project sales. District Scouters may help select and sell specific items determined to be in support of council operating budget by the council finance committee.

United Way relationships and budget presentations are the responsibility of influential district volunteers in some districts.

\$Committee Know-How. Finance committee members, along with top district leaders, need to have or develop the following knowledge:

- Understanding their responsibilities
- Donor relations skills
- Campaign management techniques
- Volunteer selection and recruiting methods
- Knowledge of the council's finance plans, campaigns, and procedures

District Finance Goals

Each district within the council has finance goals. These goals are based upon a fair-share formula, taking into consideration the potential of the district and the needs of the council. The district finance chairman assists in determining the goals and accepts the district goal.

Financing within the district is by participation in the campaigns developed and conducted by the finance committee of the council.

Successful financing of the council is the direct result of successfully conducting within each district the fund-raising programs authorized by the council finance committee.

Three Things to Remember

When planning and implementing any fund-raising project, keep the following three principles in mind:

1. People can give only what they have, so you must search for people with the ability to give.
2. People give and often give more when they are involved. Look for people with an interest in or even an indirect tie to Scouting. Continuously work to involve more people in Scouting.
3. Although some people give because they believe in the organization, most people give more if the right person asks them. Always do your homework to determine who can make the best approach to the donor. When asking for a gift or when recruiting a campaign chair, make sure someone the prospect respects or who has influence with the prospect goes with you.

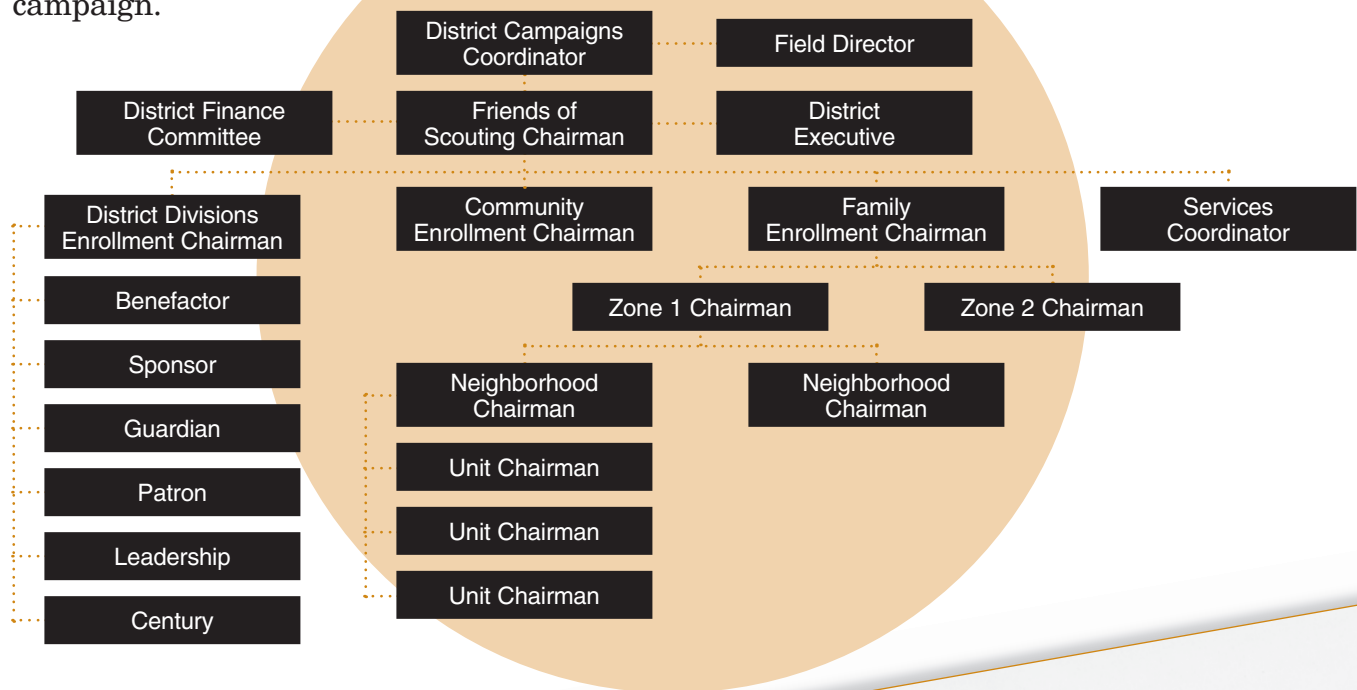
Campaign Success. It is important to ensure that:


- Influential leadership is selected. Involve community leaders with proven and successful leadership experience in the campaign.
- Prospect lists are 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.
- The calendar of events and work schedule are controlled.
- Contributors and workers are recognized promptly.

District Friends of Scouting Organization

The two suggested organization charts illustrated below will serve as a guide depending on the size of the campaign.

For Large Districts





MAKE CHECK PAYABLE TO →

I hereby express my desire to participate in the character development, citizenship training, and mental and physical fitness program of the Boy Scouts of America and to subscribe to the above-named council, Boy Scouts of America, in the amount indicated.

SIGNATURE: _____ DATE: _____

ENROLLED BY: _____

NAME NO. _____ CAMPAIGN _____ DISTRICT _____ DIVISION _____ COMMUNITY _____ WORKER _____

MAKE ANY CHANGES

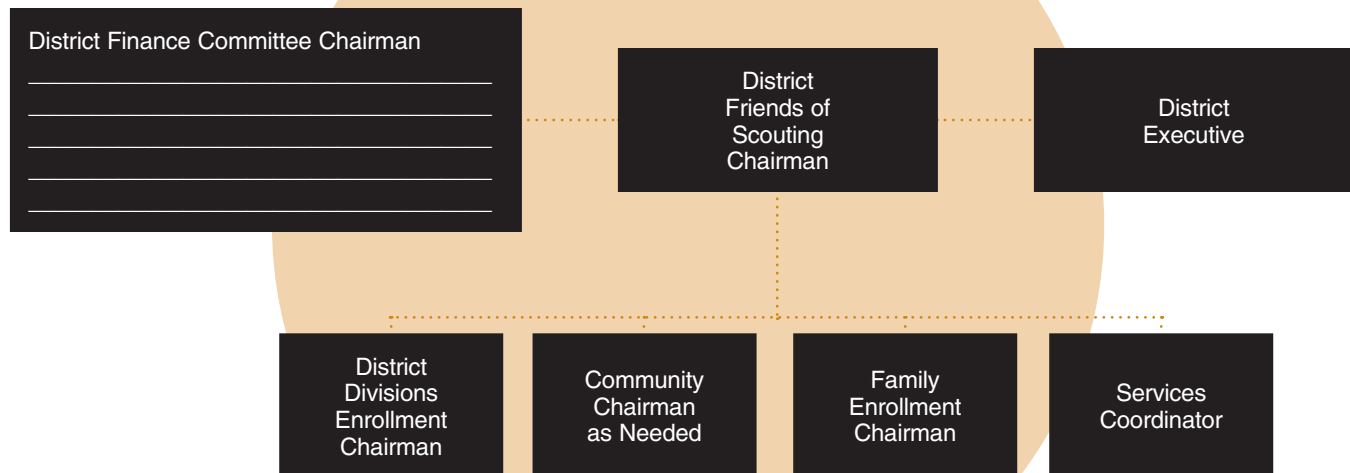
BOY SCOUTS OF AMERICA

Pledge \$ _____

Payment \$ _____

First Billing Date _____

For Small Districts



Note: In very large districts, county or zone chairmen may be assigned to a group of communities.

District Enrollment Calendar

September–October	District/divisions enrollment chairman recruited.	Benefactor	\$5,000
September–November	Prospect selection and evaluation.	Sponsor	2,500
November–December	Chairman attends information meeting.	Guardian	1,000
	Recruit the following:	Patron	500
	Benefactor chairman	Leadership	250
	Sponsor chairman	Century	100
	Guardian chairman		
	Patron chairman		
	Leadership chairman		
	Century chairman		
	Prepare prospects lists in the order listed (chairman, district executive, and others assist):		
		December–January	Recruit enrollment personnel as needed in divisions.
			Recruit dinner hosts.
		January	Kick off for these divisions with enrollment dinners as needed:
			Benefactor
			Sponsor
			Guardian
			Patron
			Leadership
			Century

Financial Resources

The youth member, the community, and the nation provide resources that make Scouting possible.

Youth members. The youth member is encouraged to pay personal expenses. Thrift and personal responsibility have always been objectives of the Boy Scouts of America. In addition to purchasing a uniform and personal equipment, the member pays a registration fee, unit dues, camp fees, and covers other personal expenses.



Scouting units. Scouting does not build clubhouses or, directly, operate units. Local organizations receive a charter from the Boy Scouts of America to operate their own units. This agreement is a dual responsibility. The BSA local council provides service and a professional staff to make possible continuing successful unit operation. The chartered organization provides a meeting place, maintenance, utilities, and volunteer leadership. The council seeks out potential chartered organizations where boys live. In addition to facilities and leadership provided by the chartered organization, the unit members and parents conduct approved money-earning projects to pay for unit equipment and expenses.

Local Councils. The community pays for the BSA local council expenses required to provide the staff and services needed to achieve planned goals of membership growth and quality program. These services include maintaining outdoor programs and training facilities.

Financing within the communities of the local council is based upon a broad base of overall community support from the United Way and a Friends of Scouting campaign conducted among the parents, registered Scouters, and others with a designated interest in Scouting. Income from activities and endowment funds provide additional support. Special funds are frequently secured from foundations, grants, product sales, and project sales.

Successful efforts to reach large numbers of youth from inner-city and rural areas plus innovative programs require careful planning to ensure maximum results from all resources. Costs are often supplemented in low-income areas by special local council funds.

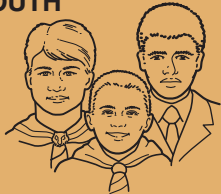




Local councils may participate in government programs to finance special projects. These grants are related frequently to poverty areas and minority or ethnic groups. All government grants must be approved by a regional office of the Boy Scouts of America.

National Organization. The national office is constantly adding new programs to meet the needs of youth in a changing era. A national staff of skilled administrators and specialists in the total program of Scouting is employed. Four regional offices provide direct service to the more than 300 councils.

National costs are paid from membership fees, local council service fees, profit from Supply Group and Magazine Division operations, investments, and special grants from foundations, individuals, and corporations.



Scouting Dollars

	WHERE DOES THE MONEY COME FROM?	WHERE DOES IT GO?
YOUTH 	Personal savings Participation in money-earning projects Families	Uniforms Handbooks Personal equipment Camp fees
THEIR UNITS 	Members' dues Special money-earning projects	Unit equipment Registration fee* <i>Boys' Life</i> magazine* Insignia Special events Program materials <small>*after the first year</small>
CHARTERED ORGANIZATIONS 	Chartered organization's budget	Meeting rooms, light, and heat and air conditioning, restroom facilities
YOUR COUNCIL 	United Way organizations Friends of Scouting Project sales Special events Bequests Product sales Endowment income	Organizing units Serving existing units Training leaders Maintaining camps Maintaining local council service center records and information Professional staff support Activities and events Liability insurance for chartered organization
NATIONAL ORGANIZATION 	Members' registration fees Magazine subscriptions and ads Supply Group uniform and equipment sales Grants National service fees	Local council assistance Program research and development Program materials and literature support Professional training Communications Local council insurance and benefits

Unit Finance

One of the responsibilities of the council and district finance committees is to work out a plan for keeping units informed on national policies concerning unit finance and to approve proposed unit money-earning projects.



It is important that the unit committee understands its responsibility for guiding the finances of the unit. It promotes the proper use of the unit budget plan, both as a sound method of securing unit funds and also as a means of training boys in thrift, in paying their own way, and in the planning and wise administration of unit funds.

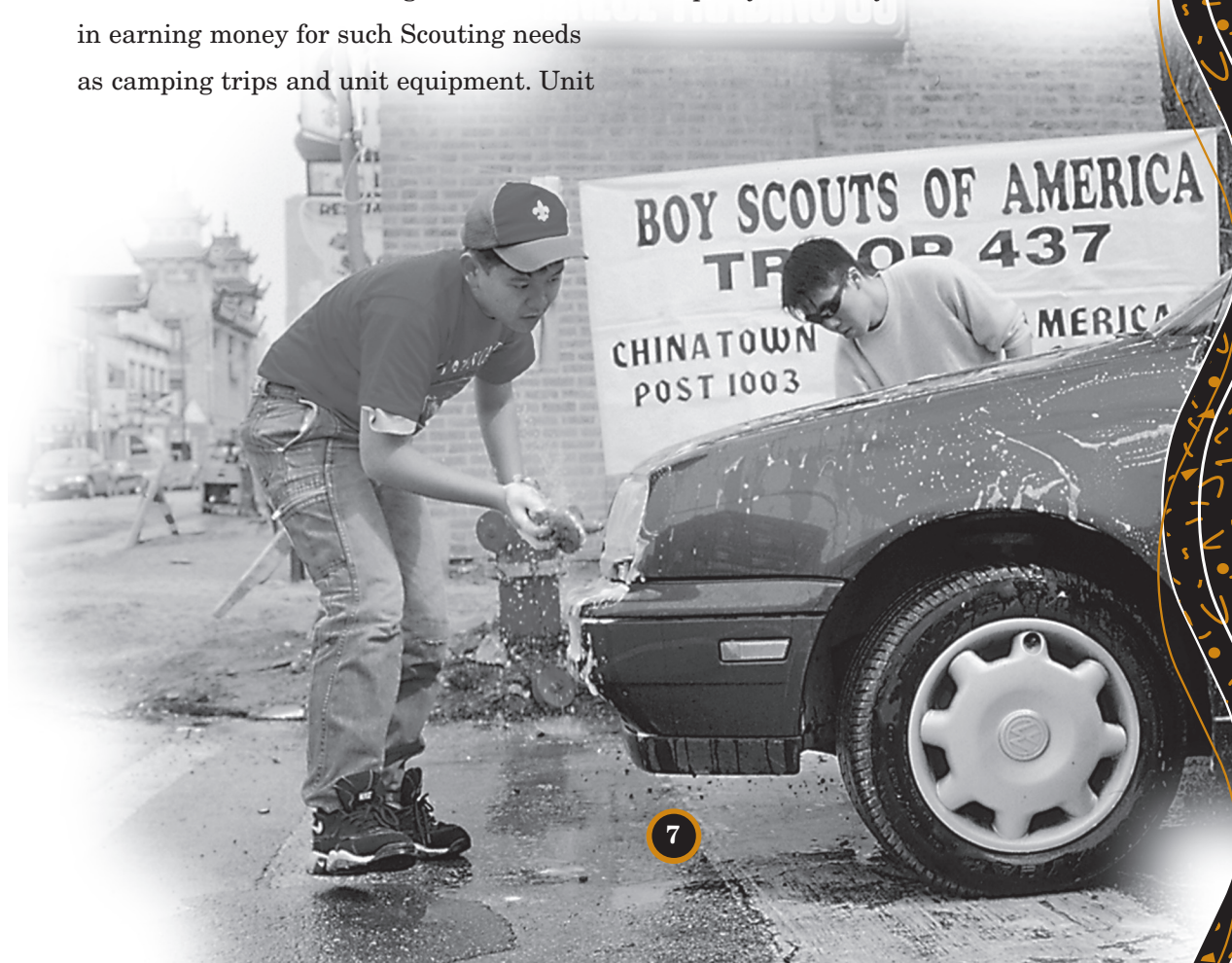
The unit committee also guides the unit in earning money for such Scouting needs as camping trips and unit equipment. Unit

committees need to be informed of policies concerning unit money-earning projects. These policies protect both the character development values of the program and the good name of Scouting.



The Boy Scouts of America has established policies to protect both the unit and the good reputation of Scouting.

The local council follows national guidelines and implements the policy of the Boy Scouts of America.



1. No direct solicitation for funds by units is permitted.
2. The unit committee is the custodian of all unit funds.
3. All units submit the Unit Money-Earning Application, No. 34427B, to the local council for approval at least one month prior to the fund-raising activity. Such approval is contingent on prior approval of the unit committee and chartered organization.
4. General guidelines for unit money-earning projects include the following:
 - No gambling, raffles, or conflict with local ordinances.
 - “Value received for money spent.”
 - Respect territorial rights of other units.
 - No conflict with goods or services offered by established merchants or workmen. Date scheduled not to conflict with established dates of fund-raising in the chartered organization, council, or community.



- The name and goodwill of the Boy Scouts of America must be protected and not used as a “front” for commercial interests.
- No contract signed by a unit may bind the Boy Scouts of America, either local or national.
- Unit money-earning projects can be planned to serve a dual purpose of conservation and money earning. Collection of aluminum, glass, paper, and scrap metal can be profitable when near a recycling facility. Units should be sure of a market before any collection. A collection must be well planned with adequate adult supervision and safety precautions.



Unit fund-raising projects usually fall into one of four groups, as follows:

1. Service projects—car wash; forestry projects; collection of paper, aluminum, scrap iron, plastic
2. Activity involving parents—bake sale, pancake breakfast, spaghetti dinner
3. Sale of tickets for council show or other events
4. Sale of commercial product—candy, Christmas trees, first-aid kits, popcorn, light bulbs

Before embarking on a money-earning project, the need for money should be evaluated against the probable net income from the effort.

BOY SCOUTS OF AMERICA DATE _____

UNIT MONEY-EARNING APPLICATION

Please submit this application to your council service center well in advance of the proposed date of your money-earning project. Read the 10 guides on the other side of this form. They will help you in answering the questions below.

☐ Pack
☐ Troop
☐ Team
☐ Post

No. _____ Chartered Organization _____

Community _____ District _____

Submitted the following plans for its money-earning project and requests permission to carry them out.

What is your unit's money-earning plan? _____

About how much does your unit expect to earn from this project? _____

Does your chartered organization give full approval for this plan? _____ How will this money be used? _____

What are the proposed dates? _____

Are tickets or a product to be sold? Please specify: _____

Will your boys be in uniform while carrying out this project? (See items 4 and 5 on other side.) _____

Have you checked with neighboring units to avoid any overlapping of territory while working? _____

your product or service in direct conflict with that offered by local merchants? _____

any contracts to be signed? _____ If so, by whom? _____

unit on the budget plan? _____

ch does your unit have in its treasury? _____ How much are the dues? _____

(Chartered Organization Representative) _____

(Chairman, Unit Committee) _____ Signed _____

DISTRICT OR COUNCIL FINANCE COMMITTEE: _____ (Unit Leader)

to the following conditions _____ (Address of Chairman)

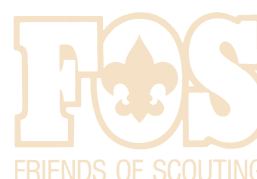
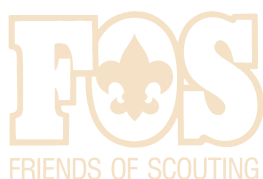
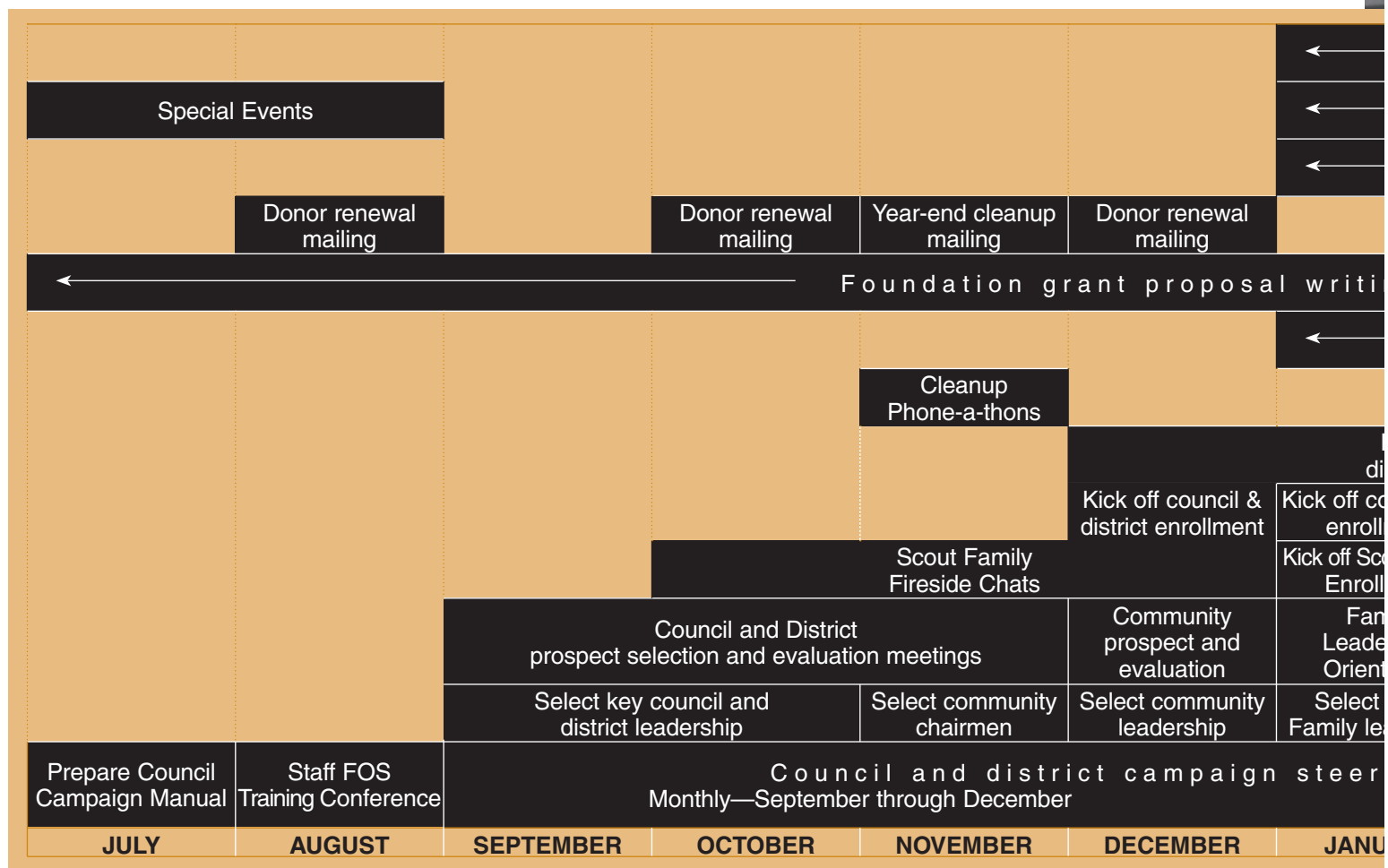
Telephone _____

Date _____

TIME LINE FOR COUNCIL ANNU

The following time line shows how the major elements of the FOS campaign fit together in a logical sequence. When implemented under the direction of competent key leadership and supported by sufficient committed and enthusiastic volunteers following the campaign plan and time schedule, success is virtually assured.

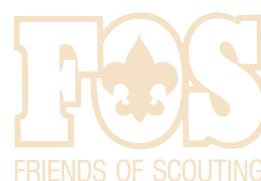
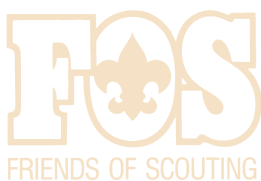
It also portrays how other components in the council's comprehensive fund-raising strategy can be integrated into a coordinated total plan.



ANNUAL FUND-RAISING STRATEGY



Workplace Campaign						Workplace Campaign
Special Events: distinguished citizen award dinner, luncheons, auctions, golf tournaments, etc.						Special Events
Project Sales Solicitation						Project Sales
	Donor acquisition mailing		Renewal mailing to low-end donors	Donor acquisition mailing		Direct Mail
Writing and submissions						Foundation Grants
Corporate Matching Gifts						Matching Gifts
	Scout Family Phone-a-thons					Phone-a-thons
Regular council and district report meetings			VICTORY CELEBRATION			FOS
Off community enrollment	Enrollment continues					
Off Scout Family Enrollment	Enrollment continues	Complete Scout Family Enrollment				
Family Leadership Orientation						
Select Scout Family Leadership						
Planning committee meetings Twice a month—January through April				Complete analysis of campaign giving and leadership		C A M P A I G N
JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	



PRODUCT SALES IN THE DISTRICT

Friends of Scouting, United Way income, special events, camping revenue, and activities income are all examples of revenue sources for a local council budget. Another source of revenue, which has clearly grown during the last 25 years, is product sales. Orders for items like candy, popcorn, magazine subscriptions, and even granulated fertilizer are all sold door-to-door, in front of stores at the mall, at work by parents, and even on the Internet. Popcorn sales, however, are the only official product sales program supported by the Boy Scouts of America. Cub Scouts, Boy Scouts, and Venturers sell products to earn prizes, scholarships, money for summer camp or Cub Scout day camp, and even trips to Busch Gardens and Disney World. Product sales income has increased from 6 percent of a council's annual budget in the 1980s to at least 10 percent and in some councils, more than 20 percent during the 1990s and 2000s.

Product sales are here to stay and in the next few paragraphs, we will explain the role of the district in product sales, share a few job descriptions of key volunteers, discuss the "Ideal Year of Scouting", and give an overview of the value of having a successful product sales campaign in your district.

DISTRICT'S ROLE IN PRODUCT SALES

Product sales (or in most cases, popcorn sales) do a number of positive things for a district:

1. Invites units to rally around and support a specific project or fund-raiser.
2. Creates another opportunity for recruiting new volunteers.
3. Is a wonderful opportunity for youth to earn prizes and/or commissions by selling (in uniform) a commercial product.
4. Allows units to earn enough funds to pay for a whole year's worth of fees, literature, and special trips for their youth members.
5. The units support the district; the districts can show support for the council by running a positive, enthusiastic, productive product sale campaign.

The campaign structure is organized much like a special event or Scout show. The chairman of the campaign is called the **district kernel** and he/she is responsible for achieving the district's product sales goal. The kernel recruits a district popcorn committee to assist in filling positions of marketing, distribution, finance, and training. (Please refer to the district kernel job description on page 13.)

The campaign usually runs from Labor Day until Thanksgiving with youth taking preorders by going door-to-door (with parents assisting), selling in front of stores in the mall (with permission), and contacting family, friends, and business acquaintances either by phone, in person, or on the Internet. During the campaign, as the youth reach certain sales objectives, they can receive prizes or commissions (to their unit's individual account) for their efforts.

The district is also responsible for securing a site for distribution of the product to the units and recruiting the personnel to assist in delivering the product. As you can see, product sales at the district level is a major undertaking, and recruiting the best volunteers available is critical for this campaign to succeed. Accounting for the orders, popcorn distribution, and collection of the funds needs to be handled by the most trustworthy district volunteers who understand the importance of the job and have the skills to accurately keep track of cash flow, record keeping, and accounting of funds.

After the orders have been submitted to the district, the popcorn order is submitted to the council popcorn committee, who in turn sends it to the popcorn vendor. Distribution dates and locations, which have been arranged in advance, are communicated once again to the units. On the day after the popcorn arrives at the distribution site (usually a vacant warehouse or a large storage area within the district's boundaries), units arrive to pick up their order. Any left over product can be stored at the site or at the council service center and sold at a later date.

THE IDEAL YEAR OF SCOUTING (IYOS)

During the course of the year, the unit committee has one or more meetings with the district representatives and sets up a process for planning the unit's budget. In doing so, they must determine how much money they will need to pay for all of the costs of running a successful unit. These expenses will include: insurance, registration, food and drink at meetings, trips, summer camp or day camp, funds to offset the costs of den, patrol, or unit meetings, and other expenses that come up during the year.

The Boy Scouts of America has come up with a planning process called the "District Core Process for Unit Planning" whose objective is to provide the unit with support and resources necessary to implement and conduct an ideal year of Scouting. The process is facilitated in five steps. These include a program survey, the planning process, how-to budget for the year, reviewing the budget and the unit's annual plan, and sharing with families in each unit their responsibility in making this process work.

Step 1

Face-to-face program survey with every unit leader, committee chairperson, treasurer, and charter organization representative.

PROGRAM SURVEY INCLUDES:

1. Understanding operating issues within the unit concerning manpower, money, and program.
2. Understanding unit goals.
3. Explaining the values and benefits of annual planning and budgeting.
4. Understanding how the council can better serve the unit.

IMPLEMENTATION:

1. District executive, chairperson, and commissioners training including:
 - Explain the five-step process and the goals for the program.
 - Program survey process, materials, and information that need to be prepared before the meeting like fund-raiser revenue, activities they participated in, any other issues, etc.
 - How to convey the benefits of planning and budgeting, and tying these facts to the program survey.
2. Data collection system so the council can track progress of each unit.

Step 2

Facilitate with every unit committee, unit leaders, and charter representative the planning process needed to have an Ideal Year of Scouting (separate meetings for packs, troops, teams, and crews).

INCLUDING:

1. National, council, and district activities.
2. Discussion of local unit activities.
3. Brainstorming of other possible activities.

IMPLEMENTATION:

1. District executive, chairperson, and commissioners training including:
 - How to walk through a planning process to maximize the activities and programs.
 - The Ideal Year of Scouting program calendar by district.
 - Local and national success stories.

- Examples of exciting regional activities with cost.
 - Completed examples of planning process and forms.
2. How do you get attendance?
 3. Data collection system so the council can track progress of each unit.

Step 3

Facilitate with all unit committees, unit leaders, and charter representatives the budgeting process needed to have an Ideal Year of Scouting (separate meetings for packs, troops, teams, and crews).

INCLUDING:

1. All annual activity, material, registration, and training cost.
2. Process for setting per-youth goal.
3. Completion date for the Ideal Year of Scouting (separate for the unit's final plan and budget).

IMPLEMENTATION:

1. District executive, chairman, commissioner, and unit commissioners training including:
 - How to take annual plan and convert into a budget.
 - Costs for national, council, and district activities and programs (including registration, etc.).
 - How to take budget and break it down to unit and Scout goals.
 - What the follow-up process includes and how to reach each unit with assignments.
2. Data collection system so the council can track progress of each unit.

Step 4

Review with every unit leader, committee chair, treasurer, and charter representative their annual plan and budget. Make sure they have set recruitment night and unit program kickoff dates.

IMPLEMENTATION:

1. Need to review original unit program survey and see if annual plan and budget help them achieve their goals.
2. Review adding other activities during the Ideal Year of Scouting.
3. Data collection system so the council can track progress of each unit.

Step 5

Work with every unit on how to communicate their Ideal Year of Scouting plan and budget to their families. Show each unit how to use their plan and budget to recruit and retain families and volunteers while building excitement and support for all of their programs.

EXAMPLES:

1. Recruitment night: Customized fliers for each unit so they can recruit families to all of their great programs.
2. Unit program kickoff: Customized program with agenda and speaker notes to explain the annual program and the role they need the families to play in order to reach their goals.
3. Newsletters: Templates and timelines on how to use them.

IMPLEMENTATION:

1. Train everyone who will be running recruitment night and parent night including:
 - How to use the annual plan during meetings.
 - How to convey the message of what the program is and what each family's role is.
 - Agenda with script and meeting notes for recruitment night and unit program kickoff.
 - Customized recruitment night fliers by unit for them to use.
2. What is the best forum for this training?

By following this plan of action, units can determine what activities they would like to do throughout the year, which people are responsible for organizing them, how much it will cost to fund these activities, and how each family can contribute their own special talents to help make the program succeed. Using this annual budget planning process, participation in district and council activities, and communication between parents and leaders will ensure a successful Scouting year for each unit in the district. **And it all starts with the district organizing a product sales campaign.**

DISTRICT KERNEL

Job Description

Coordinate the sale in your district in order to help units achieve their goals, maintain financial stability, and reach the district's sales goals.

- Recruit a district popcorn committee consisting of individuals to fill the jobs of marketing, distribution, finance, and training.
- Working with the popcorn committee, assist all units to help them plan their Ideal Year of Scouting through individual or district-wide training.
- Working with the popcorn committee, contact all units to explain the popcorn sale, obtain their commitment, establish a unit chair, and encourage them to establish a goal.
- Working with the popcorn committee, individual invites representation at the council- and/or district-wide Ideal Year of Scouting budget planning meetings.
- Attend council- and district-wide planning meetings.
- Assist in budget planning meetings for all units in attendance. Provide information for those units unable to attend.
- Promote the Ideal Year of Scouting at the monthly roundtables and how it supports the Scouting programs.
- Promote the popcorn sale at the council and/or district kickoff meetings, roundtables, program launches, pow wows, etc.
 - Different sale methods: show-n-sell, show-n-deliver, and take order
 - Key sale dates
 - Prize information
 - Distribution arrangements
- Instruct units how to place their popcorn and prize orders using the popcorn Web site.
- Help tabulate popcorn and prize orders for units without access to the Internet.
- Assist units on distribution day. Ensure the correct inventory is handed out, along with a product receipt.
- Remind units of payment due date and assist council in contacting units.
- Attend council post-sale review. Offer tips on ways to improve the program.
- Work with the district finance chairperson and unit finance executive to conduct Ideal Year of Scouting training within the district (March–June).

POLICIES AND PROCEDURES

The following is a list of excerpts from approved policies and procedures pertaining to local council finances. Each local council is to maintain the integrity of the policies and procedures. Authority is Bylaws of the Boy Scouts of America (BBSA); Rules and Regulations of the Boy Scouts of America (RRBSA); Standard Local Council Articles of Incorporation and Bylaws (SLCAIB); or National Executive Board Resolution (NEBR).

USE OF UNIFORM

Rules and Regulations, article X, section 4, clause 6. The official uniforms are intended primarily for use in connection with Scouting activities as defined by the National Executive Board and their use may be approved by local council executive board for council events or activities under conditions consistent with the Rules and Regulations of the Boy Scouts of America.

UNIT MONEY-EARNING PROJECTS

1. Rules and Regulations, article IX, section 2, clause 3. Units may conduct money-earning projects only when the projects have been approved by the chartered organization and the local council and are consistent with the principles set forth in these Rules and Regulations.
2. Rules and Regulations, article XI, section 1, clause 1(a). Limitation of Authority. No unit or local council shall have authority to commit the National Council to any financial obligation whatever.

LOCAL COUNCILS

1. Bylaws of the Boy Scouts of America, article XI, section 1, clause 2. Contributions shall be solicited in the name of the Boy Scouts of America only through or by the authority of the Corporation, and shall be limited to the National Council or chartered local councils, in accordance with these Bylaws and Rules and Regulations of the Corporation. Youth members shall not be permitted to serve as solicitors of money for chartered organization units, for the local council, or in support of other organizations. Adult members and youth members shall not be permitted to serve as

solicitors of money in support of personal or unit participation in local, national, or international events. Youth members, however, are permitted to secure sponsors for council or district activities approved by the executive board. These approved activities may result in financial support for the local council in accordance with the Bylaws and Rules and Regulations of the Corporation.

2. Local Council Articles, article X, Control of Funds and Property, section 2, Budget, clause 1. The executive board shall, preceding the commencement of each fiscal year, consider and adopt a budget of estimated expenditures by the corporation for such fiscal year. No funds shall be expended by the corporation during a fiscal year without the authorization of the executive board or the executive committee for any item not covered by, or in excess of the amount authorized by, the budget for such year.
3. A statement of all income and expenses of the corporation during the fiscal year and a statement of all assets, liabilities, and fund balances of the corporation as at the end of such year shall be duly audited and certified annually in accordance with generally accepted auditing standards, by public accountants or other recognized independent public accountants approved by the executive board or executive committee. SLCAIB, article X, section 2, clause 6.
4. No division of the national membership fee between the national Corporation and local councils is permitted. NEBR, May 1970.
5. No division of the Friends of Scouting fee between the local council and its Scout units shall be considered. NEBR, May 1970.
6. Rules and Regulations, article XI, section 1, Finance, Local Council and Unit Finance, clause 1(f), Control of Funds: Product Sales. The National Council will not engage in a product sale at the national level.
7. Rules and Regulations, article XI, section 1, clause 1(e): Gambling. Any fund-raising project designated to benefit chartered organization units, districts, local councils, or on a national basis that involves games of chance, lotteries, sale of raffle tickets, bingo, or could be construed as a gambling activity, is not permitted.



8. Money-raising projects on a unit or council basis that include the sale of raffle tickets are in violation of the policies of the Boy Scouts of America. NEBR, October 1973.
9. Surplus from Scout shows may be disposed of in whatever manner the local council deems proper. NEBR, October 1972.
10. Rules and Regulations, article IX, section 2, Commercial Contracts, clause 7: (a) No member of the Boy Scouts of America, chartered unit, chartered local council, or any officer or representative of the Boy Scouts of America shall have the right to enter into a contract or relationship of a commercial character directly involving or obligating the National Council, Boy Scouts of America, unless duly authorized by the National Executive Board. (b) A local council may not enter into a contract or business relationship that uses any logo, insignia, terms in common usage, or descriptive marks relating to Scouting, unless the relationship or contract conforms to currently accepted procedures and guidelines as established by the National Council, Boy Scouts of America. The contract or relationship must avoid endorsement of any commercial product or venture. (c) Subject to the above, chartered organizations, unit leaders, or youth members shall not be restricted from earning money to obtain their own unit equipment, provided that all approved procedures for doing so are followed, including prior approval by the governing local council.
11. The fiscal year of the corporation shall be the calendar year. SLCAIB, article XI, section 5.
12. Rules and Regulations, article X, section 4, Use of Uniform, clause 6: The official uniforms are intended primarily for use in connection with Scouting activities as defined by the National Executive Board and their use may be approved by the local council executive board for council events or activities under conditions consistent with the Rules and Regulations of the Boy Scouts of America.
13. Title to all real estate acquired for a unit under the jurisdiction of the corporation shall be vested in (a) the name of the corporation (if the corporation agrees to hold title to property), (b) the operator of such unit (if the operator is a chartered organization or community group), or (c) a bank or trust company, in each case in trust for the use of the unit, where appropriate in accordance with the wishes of the donor, with a provision in the trust deed that in the event of the dissolution of the unit or the revocation, termination, or lapse of its charter, the trustee will, after satisfying any claim against such unit to which such real estate may be subject, hold the property upon the instructions of the corporation or, if so instructed, convey said property or pay the net proceeds from a sale of the property to the corporation, which shall hold or use said property or funds for the benefit of Scouting in the locality in which the unit is located or elsewhere if, after a reasonable period, there is not a suitable opportunity to use said property or funds in such locality. SLCAIB, article X, section 2, clause 4.
14. Rules and Regulations, article IX, section 2, Advertising Policy, clause 5: (a) Advertisements for placement in Scouting publications and other media, in addition to meeting the standards in general use by publishers of high-grade periodicals and other advertising media, must:
 - (1) Relate to a service or product that could reasonably be foreseen to render some service to the audience of the advertisement, or relate in some way to the purposes of the Boy Scouts of America, and
 - (2) Merit the purchase price of the article or service offered in the advertisement.(b) No advertisement will use or display any logo, insignia, terms in common usage, or descriptive marks relating to Scouting without conforming to all currently accepted procedures and guidelines as established by the National Council, Boy Scouts of America, and interpreted in the local council policy guidelines for advertising and commercialism.



Finance Support Online Research and Support

Wealth Engine—FSD

This research tool is designed to help conduct research on individuals and corporations. It consolidates information from Dunn and Bradstreet, Guidestar, disclosure stock transactions, real estate holdings, charitable contributions, and federal campaign contributions. Use the user name and password detailed in the "Research Instructions" section at www.fsd.org to gain access to this valuable resource.

Foundation Center—FSD

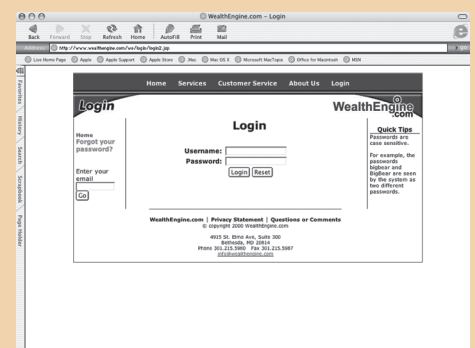
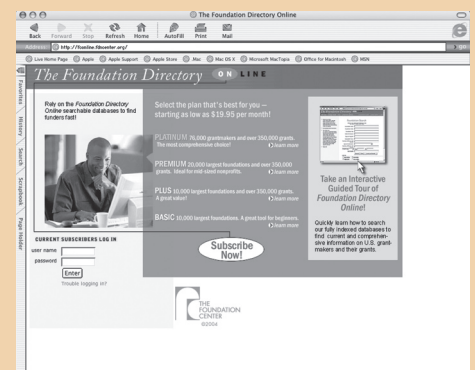
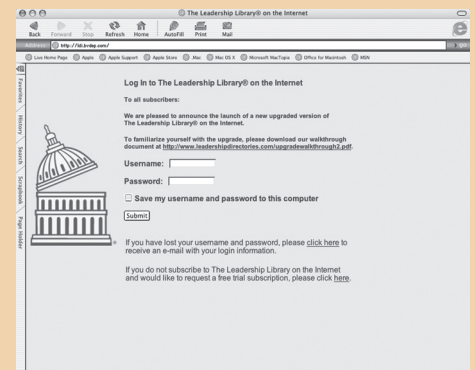
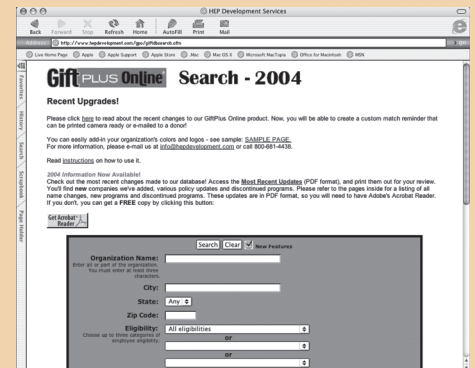
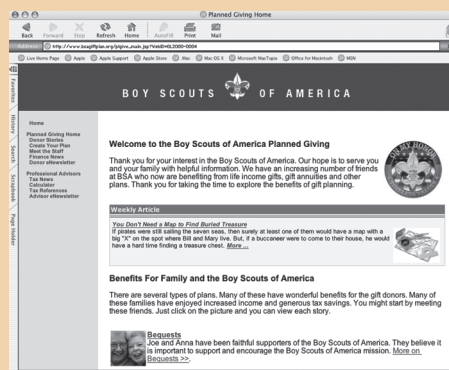
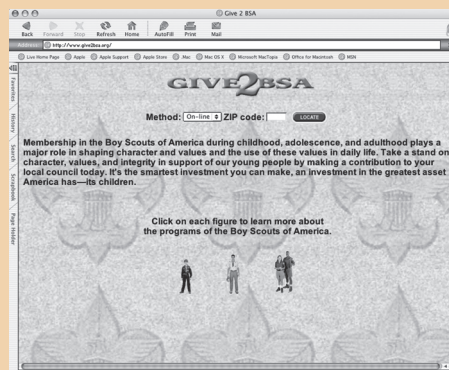
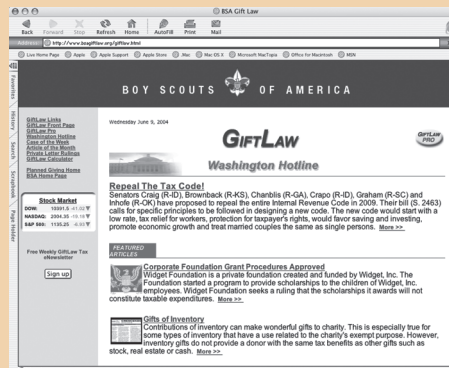
The Foundation Center has been the premier source for foundation research for many years. Now the convenience of the Internet puts this information at your fingertips. Use this tool to quickly identify your best prospects for foundation funding. The user name, passwords, and instructions are found at www.fsd.org.

Leadership Directories—FSD

This resource, also known as the "Yellow Books," offers comprehensive listings of officers, directors, and key employees of major corporations, nonprofits, and state and federal governmental agencies. The directory will help you identify the linkages of your board members, donors, and key community leaders.

Matching Gifts—FSD

Once again the Internet has brought us a more usable version of an old tool. Use this resource to identify organizations that match employee giving. Find contact information, gift criteria, and qualification in one simple place. Search by gift criteria, geography, or eligibility.



Finance Literature

www.fsd.org – FSD

Your one-stop shopping for finance help is at www.fsd.org. Browse through all the literature of the BSA related to fund-raising and finance. Gain access to materials to help your council in operating, capital, and endowment fund development as well as current information about coming finance events and training sessions. For login information for BSA professionals, contact the Finance Support Division.

Give2BSA

(www.scoutingfriends.org)

It is estimated that the Boy Scouts of America has between 50 million and 70 million living alumni. Add to that the number of parents and siblings of former members and we have a potential of over 100 million Americans who have experienced Scouting in their lives. The Web site www.scoutingfriends.org was created to help find some of those former members and friends and reconnect them to the Scouting program through the local council where they reside. The site allows former members to provide current contact information, share their Scouting experience, tell other former members about the site, send an electronic greeting card, and make a contribution to a local council. Councils can use many of the tools provided by www.scoutingfriends.org to accept online contributions and communicate with reconnected members.

Finance Literature

The Finance Support Division provides a broad range of literature to help local councils in the areas of operating, capital, and endowment fund development. All of these resources are available on a series of compact disks that are updated annually.

FSD Resource

(Continually Updated)

- Foundation Resource Manual
- United Way reference guide
- Annual Campaign Plan Book
- Funding Capital Needs
- Project Sales Manual
- Guidelines on Product Sales and Policy Issues
- Capital campaign self-evaluation
- Scouting's Positive Impact in the Community (Outcomes)
- Special Events Manual
- Finance Policy Manual

Friends of Scouting

(Updated Annually in June)

- Sample FOS brochures
- Friends of Scouting Resource Manual
- FOS Conference Manual
- Online brochure creator
- Clip art

All the above materials are available at www.fsd.org.

Finance-Related Training

Grant Writing Workshop

is a one-day session held on a council-cluster or area basis to assist councils in tapping foundations as a source of council support. The session includes guidance on prospect research and highlights the techniques of preparing grant requests. Participants will learn the elements of writing a successful funding proposal.

Managing Your Council's Fund-Raising Campaigns

This program, offered by the Finance Support Division, is open to all local staff members, including Scout executives, with a councilwide, finance-related assignment. Participants are invited to the national office, where they spend a day and a half with members of the Finance Support Division staff.

The staff will cover their areas of expertise and share details of the support materials/services available to local councils. This is intended to be a quick-start training experience to help new finance staff members.



Audiovisual Materials

Fundamental Campaign Methods

covers the fundamentals of philanthropy in today's economy and how the application of FOS methods shown can enhance a council's ability to meet its budgetary needs. AV-06V001

Executive Board Finance Orientation

gives new council board members a picture of the local council's total financial development program: operating funds, endowment funds, and capital funds. AV-05V001

Council/District FOS Volunteer Recruiting

- **Part 1—Recruiting FOS Leadership** depicts the successful recruitment of a council Friends of Scouting chairman following a proven step-by-step process. The importance of research, use of the nominating committee, and selection of the right people to make the recruitment visit are emphasized.
- **Part 2—Techniques of District FOS Recruitment** depicts the effective use of the district steering committee, with support from council leadership, resulting in recruitment of committed and quality enrollment leaders.

Revised Scout Family FOS/Basics of FOS

- **Part 1—Scout Family FOS** reviews the three most popular methods of raising Scout family dollars in local councils today: I-C-5, phone-a-thon, and group presentation.
- **Part 2—Basics of FOS** reviews three important areas of raising FOS dollars: prospect and evaluation, kickoff, and report meetings.

Endowment Online Research and Support

BSA Gift Plan—BSA Foundation

This site is designed to aid donors in the development of their personal estate plan. The site is updated weekly to provide examples of the various gifting vehicles available to donors. Visitors are invited to use the gift calculators to “try on” a gift before making a commitment. The calculator will help define how a gift to Scouting can not only help Scouting, but may provide the donor and their family with reduced tax obligations. The www.bsagiftplan.org site is kept up to date on news and legislation important to donors and their families.

Gift Law—BSA Foundation

This is the partner site to www.bsagiftplan.org and is designed with CPAs, attorneys, financial planners, and other professionals in mind. The site will help them serve their clients’ interests by keeping them in the know with the most recent tax legislation, news, and gift calculators. Go to www.bsagiftlaw.org.

Endowment Campaign Notebook

(Updated Annually for Top Hands)

- Council action items
- Drop-in newsletter articles
- Estate plan portfolio
- Professional and donor seminar materials
- Clip art
- PowerPoint presentations
- Newsletters
- Letters and mailings

Training

Fundamentals of Major Gifts and Endowment

is a multi-day event designed to take volunteers and professionals through the basics of establishing an endowment development program and the details of various gift vehicles and marketing strategies.

Audiovisual Support

Scouting for a Better Retirement

is aimed at people who are nearing retirement or already retired. The video shows how a planned gift to Scouting can be incorporated into a person’s total retirement and estate plans. AV-05V006

1910 Society: Giving for the Future

combines music with images from some of Scouting’s best-loved artworks to link the hopes of Scouting’s past with the promise of Scouting’s future. AV-08V014



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