2020 Friends of Scouting Campaign Plan
TABLE OF CONTENTS

Annual Campaign Timeline

District Responsibilities
  Budget Building
  Terminology
  Friends of Scouting (FOS) Planning & Management
  FOS Volunteer Recruiting
  Tips for Field Staff

Council Development Team Responsibilities
  Major Gift Emphasis
  Special Events
  United Ways
  Grants
  Endowment Fund

Appendix

FOS Meeting Schedule & Benchmarks

Council Kick-off
  o January 15, 2020 – 7 pm via video conference

Council Rally’s
  o February 12, 2020 – 5:30 pm via video conference
  o March 11, 2020 – 5:30 pm via video conference
  o April 8, 2020 – 5:30 pm via video conference
  o May 6, 2020 – 5:30 pm via video conference

Council Victory Celebration
  o June 3, 2020 – 7 pm via video conference

Benchmarks

- 25% of goal
- 50% of goal
- 75% of goal
- 90% of goal
- 100% of goal
Timeline for “Total Financing Concept” Strategy (Operating, Capital, Endowment)

<table>
<thead>
<tr>
<th>Districts</th>
<th>3rd Quarter</th>
<th>4th Quarter</th>
<th>1st Quarter</th>
<th>2nd Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>August</td>
<td>September</td>
<td>October</td>
<td>November</td>
</tr>
<tr>
<td>Budget Development</td>
<td>Districts build draft event budgets</td>
<td>Executive Board adopts budget for next year</td>
<td>District FOS goals finalized</td>
<td></td>
</tr>
<tr>
<td>FOS Planning &amp; Management</td>
<td>Prepare council campaign manual</td>
<td>Staff FOS Training</td>
<td>Monthly Council and district campaign steering committee meetings</td>
<td></td>
</tr>
<tr>
<td>FOS Planning &amp; Management</td>
<td>Analyze prospects lists</td>
<td>P &amp; E meetings</td>
<td>FOS Campaign Kickoff</td>
<td></td>
</tr>
<tr>
<td>FOS Volunteer Recruiting</td>
<td>Key council leadership recruited</td>
<td>District FOS Chair recruited</td>
<td>District FOS volunteer teams recruited</td>
<td></td>
</tr>
<tr>
<td>FOS Volunteer Recruiting</td>
<td>District Comm. &amp; Family Chairs recruited</td>
<td>- Family presenters</td>
<td>Phone-a-thon &amp; cleanup campaign volunteers recruited</td>
<td></td>
</tr>
<tr>
<td>FOS Volunteer Recruiting</td>
<td>District FOS volunteer teams recruited</td>
<td>- Breakfast Chairs and Table Hosts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FOS Volunteer Recruiting</td>
<td>District FOS volunteer teams recruited</td>
<td>- Breakfast Chairs and Table Hosts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FOS Volunteer Recruiting</td>
<td>Family FOS presentations conducted</td>
<td>Phone-a-thon &amp; cleanup campaign volunteers recruited</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FOS Volunteer Recruiting</td>
<td>Scout Family Phone-a-thons</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FOS Volunteer Recruiting</td>
<td>Renew Major Donors</td>
<td>Breakfast for Scouting events in communities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FOS Volunteer Recruiting</td>
<td>Project sales solicitation</td>
<td>Gift in Kind solicitation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Development Team</td>
<td>Trail’s End Popcorn</td>
<td>Spring Product Sale</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Development Team</td>
<td>3rd Quarter</td>
<td>4th Quarter</td>
<td>1st Quarter</td>
<td>2nd Quarter</td>
</tr>
<tr>
<td>Development Team</td>
<td>August</td>
<td>September</td>
<td>October</td>
<td>November</td>
</tr>
<tr>
<td>Development Team</td>
<td>Special Events</td>
<td>Lawn Socials &amp; Golf Outings</td>
<td>Heroes &amp; Leaders Gala</td>
<td>Good Scout Award Luncheon</td>
</tr>
<tr>
<td>Development Team</td>
<td>United Way</td>
<td>Black-out period during United Way campaign (September thru November)</td>
<td>United Way proposals</td>
<td>United Way presentations</td>
</tr>
<tr>
<td>Development Team</td>
<td>Direct Mail</td>
<td>Donor renewal mailing</td>
<td>Donor renewal mailing</td>
<td>Year-end clean-up mailing</td>
</tr>
<tr>
<td>Development Team</td>
<td>Foundations</td>
<td>Grant proposals submitted</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Development Team</td>
<td>Endowment</td>
<td>Heritage Society &amp; James E. West events, planned giving seminars, tax incentive reminders</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Development Team</td>
<td>Capital</td>
<td>Fundraising for capital projects approved by the board</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
DISTRICT RESPONSIBILITIES

The Boy Scouts of America has earned the reputation over the years of being one of the premier charitable organizations in the country. This reputation reflects the planning, execution, and completion of successful FOS campaigns. It also reflects that we are good stewards of the money donated to us because we follow a well-planned budget.

Budget Development

For the 2020 budget, each project code will be completed in the manner and timeline outlined below.

Volunteer oversight will be expected for each of the major components of the budget. Each project code will be assigned to one of these components. Members of the Executive Board, as well as other key volunteers will be invited to participate in this process. The appropriate member of the Scout Executive’s Cabinet will serve as the primary advisor to each of these committees.

| Administration/Compensation & Benefits | Darrell Utke/Rich McCartney |
| Field Service/District Operations/FOS Campaigns | Darin Steindl/Rob Gilkerson |
| District Activities | Field Staff/District Volunteers |
| Popcorn Revenue | Darin Steindl/Terri Schultz |
| Special Events/Direct Mail/United Way | Dale Musgrave/Rich McCartney |
| Camping/Program | Tom Barry/Rich McCartney |

Timeline:

**Wednesday, September 25, 2019 (Staff Meeting)**

Budget Project Codes will be shared with the Field Staff.

An orientation of the budget process will be a part of the Field Staff Meeting. Budget Project Codes as well as a copy of the 2020 Budget Narratives will be distributed at this meeting. These completed reports are due on October 15th.

**September 26 – October 10**

Staff members conduct budget-planning discussions with key volunteers and draft initial budgets

**Friday, October 11, 2019**

Completed council and district event budgets are due to staff leaders for review and uploaded to the Shared drive (not SharePoint).
October 16-17, 2019

Staff/volunteers meet with budget committee to present and support various budget assumptions. Schedule to be determined.

Friday, October 18, 2019

Council Treasurer reports to the Executive Board on the Budget Development progress.

Tuesday, November 5, 2019

Scout Executive and management team meet to review each project code and make adjustments.

Friday, November 8, 2019

Budget Committees reviews current year financial projections and approved recommended draft budget to be presented to the Council Executive Committee.

Friday, November 15, 2019

Council Treasurer presents draft 2020 budget to Executive Committee for review, comment and discussion.

Tuesday, December 3, 2019

Scout Executive and management team meet to review modifications & approvals from

Friday, December 20, 2019

Council Treasurer presents 2020 budget to Executive Board for approval.

Monday, December 23, 2019

Final budgets are shared with staff and volunteers.

Wednesday, January 1, 2020

New budget goes into effect.
Terminology

FOS

Friends of Scouting. Before Friends of Scouting, the fundraising campaigns were called Sustaining Membership Enrollment or SME. Most people didn’t understand what that meant, so the campaigns were changed to a more “friendly” name. There are different parts of the Friends of Scouting campaign:

- Community
- Family
- Gift in Kind
- Project Sales
- Special Events
- Foundations

A description of each of these parts of the FOS campaign is included in this guide.

Gift

A gift to the FOS campaign is an amount of money or item given to the council for supporting the Scouting program in our area.

Donor

A donor is an individual, business or organization that supports Scouting by giving to the FOS campaign.

Unworked Donor

An unworked donor is an individual, business or organization that has supported Scouting in the FOS campaign in the past.

Worked Donor

A worked donor is an individual, business or organization that has been asked to support Scouting and has either made a pledge or declined to give this year.

- If a donor declines to give this, a pledge card must be turned in with “not this year” prominently written on the card. They will not be included on Unworked Donor lists for the remainder of the campaign year.
- Donors that decline to give this year will remain on our prospect list for the next year’s campaign.
Removing Donors from our Records

We do not remove donors from our records. If a donor asks to be removed or is deceased, a pledge card should be turned in with “remove”, “delete” or “deceased” written prominently on the card.

- That donor will be recorded as “worked” for this year’s campaign and will not be carried over to next year’s campaign.
- The donors giving history will remain in our computer system. But they will not be included in future campaigns as a donor or prospect.

Prospective Donor

A prospective donor (*prospect*) is an individual, business or organization that has been identified as potentially being interested in supporting Scouting.

- We need to add new donors each year to make up for the donors that reduce their gifts or decide to no longer support Scouting.

“Clearing” a Prospect

Prospective donors should be contacted only after they have been “cleared”. This means that our records have been checked to make sure that the prospective donor isn’t already a donor or prospect in someone else’s campaign. In cases where the prospect is already in someone else’s campaign, we will have a discussion to determine which campaign is the best one to “work” the gift.

Pledge

A pledge is a promise that a donor will give a specified amount before the end of the year.

- A pledge is recorded only when a completed pledge card is turned in.

Worker

The “worker” is the person that asked the donor for the gift. This information is helpful for varying reasons.

- If a donor tells us that they never made the pledge, telling them who the worker was may help them remember
- When planning the next years campaign, you will know who made the ask in the previous year

Because our staff has been lax in making sure workers were noted on every pledge card, and the computer system requires a worker to be entered – many of our pledge cards list the worker as the district executive (even if they were not the person that contacted the donor).
Pledge Card

A completed pledge card is the way we track a donor’s intent to give. For record keeping purposes, a pledge will not be recorded unless it is submitted on a pledge card.

A pledge card is considered “completed” when it contains the following information:

- Identification number
- Name of an individual or business
- Mailing address
- Phone number
- Amount of pledge
- Amount of any payment accompanying the pledge card
- Dates and frequency the donor would like to be billed
- Signature of the donor
- Name of the worker
- In instances where the donor is a business, the worker should write the name of the person making the pledge on behalf of the business

Payment

A payment is the fulfillment of a pledge. We hope that 100% of pledges are paid, but that isn’t always the case. Circumstances change and sometime pledges aren’t paid in full by the end of the year. We budget for a small pledge loss each year, but we can’t pay bills with pledges – only payments.

Each year, it is necessary to remind some donors that they have made a pledge that has not been paid in full. Sometimes they just forget to send a payment. Sometimes they are no longer able to pay the pledge.

- If a donor says they will pay the pledge and pay the pledge before the end of the year – great!
- If a donor says they will pay the pledge, but don’t pay by the end of the year – it becomes a “pledge receivable” that needs to be collected
- If a donor says they can no longer pay the pledge, we need to record it as “uncollectable”

Renewing a Gift

Renewing a gift means that a donor makes a pledge to give the same amount as the previous year.

Upgrading a Gift

Upgrading means a donor makes a larger pledge than the previous year. During the Prospecting & Evaluation meeting, we need to identify donors that may be capable of making larger gifts.
Auditing

As the campaign manager in your area of responsibility, it is your job to keep track of all gifts to your campaigns. Auditing is the process of recording who, what and when related to a gift.

Examples of good record keeping are:

- Completing an audit report that is turned in with pledge cards
- Making sure every pledge card indicates the date the pledge was made, signature of the donor and the name of the person that asked for the gift (the worker)
- Making sure that Family presentation envelope reports accurately reflect the contents of the envelope
- Each staff member records every worked donor, including donors that have declined to give, using the Worked Donors Audit worksheet
- When a Finance (FOS) report is distributed, each staff member should compare the report with their records to make sure they match. Mistakes in data entry do occasionally happen and are easily fixed when identified in a timely manner

IC5

IC5 = “I see five”. This is a recruiting strategy. You can reliably count on a campaign worker to be responsible for recruiting and/or soliciting only five prospects. Some workers can do more than five, but most can’t or won’t.

Community FOS

The Community FOS campaign is focused on asking businesses and individuals to support Scouting. Some of the individuals are former Scout leaders or people that have given through the Family campaign, but no longer have a connection to a Scout unit.

District committee members, commissioners and council board members usually will make their pledge as part of the Community FOS campaign. But some may choose to have their gift counted as part of a units Family FOS campaign.

Methods of making the ask (in decreasing order of effectiveness)

1. Personal, face to face communication to someone the volunteer team member knows
2. Personal phone call to someone the team member knows
3. Personal invitation to attend a breakfast event and sit at the team members table (people they know)
4. Personal, face to face communication to someone the team member doesn’t know
5. Personal phone call to someone the team member doesn’t know
6. Personal invitation to attend a breakfast event and sit at the team members table (people they don’t know)
7. Personal, face to face communication by a staff member
8. Personal phone call by a staff member
9. Letter sent to a donor prospect by a volunteer team member
10. Letter sent to a donor prospect by a staff member

Family FOS

The Family FOS campaign is focused on asking individuals with children involved in Scouting to support the council FOS campaign.

Methods of making the ask (in decreasing order of effectiveness)

1. Presentation by a trained volunteer team member at a Pack Blue and Gold Banquet or Troop Court of Honor
2. Presentation by a trained unit volunteer at a Pack Blue and Gold Banquet or Troop Court of Honor
3. Presentation by a staff member at a Pack Blue and Gold Banquet or Troop Court of Honor
4. Presentation by a trained volunteer team member at a Pack Pinewood Derby
5. Presentation by a staff member at a Pack Pinewood Derby
6. Presentation by a trained volunteer team member at a regular Pack or Troop meeting in April - June
7. Presentation by a trained unit volunteer at a regular Pack or Troop meeting in April - June
8. Presentation by a staff member at a regular Pack or Troop meeting in April - June
9. Personal phone call by a team member
10. Personal phone call by a staff member
11. Letter sent to a donor prospect by a volunteer team member
12. Letter sent to a donor prospect by a staff member

Matching Gift

Some companies will match the giving (monetary or service hours) of their employees. In almost all cases, the matching gift must be requested by the employee by completing paperwork with their employer. The council doesn’t initiate the matching gift process.

Due to the nature of how matching gifts are requested, we do not count matching gifts as pledges. They are only processed as pledges & payments when the gift is received.

To help donors remember to request the matching gift from their employer, staff members can not “potential” matching gifts in their records. After a month or two without receipt of the matching gift, you communicate with the donor encouraging them to ask their employer for the matching gift.

Giving Hearts

Giving Hearts Day is a one-day online giving campaign that is coordinated by the Impact Foundation in North Dakota and Northwestern Minnesota. On the annual Giving Hearts Day in February, donors give online to their favorite charity.

The Northern Lights Council, Boy Scouts of America is one of the approved charities that donors can contribute to.
Gift in Kind

Some businesses or individuals would rather give a tangible item than a monetary gift. Common items given are oil changes, office supplies, food for camp, program supplies.

We only accept items we can use. When we accept an item, the business may record the gift for their tax purposes at the value they determine.

We will only credit your campaign with a dollar amount when these criteria are met:

- The item is something that has been budgeted for in the current year (without the donation, we would need to purchase the item)
- The value of the item can be determined (the fair market value)
- The items must be received in time to be used as budgeted (i.e. perishable items must be received before summer camp ends)

If the criteria above cannot be met, we can still accept the gift if we can use it, but your campaign will not receive a credit for the gift.

We have a list of budgeted items available for ideas. Always check with a member of the management team before soliciting a Gift in Kind, because someone else may already have arranged to get the item donated.

Fund Accounting

The Boys Scouts of America uses a fund accounting system that has three funds:

- Fund 1 – General Operating Fund
- Fund 2 – Capital Fund
- Fund 3 – Endowment Fund

The Friends of Scouting campaign is income in the General Operating Fund. The Capital Fund is related to property, buildings and equipment that depreciates in value. The Endowment Fund is money that has been given in order to generate interest over time.

Project Sales

Some businesses or individuals would like to make a monetary gift for a specific project (that is not a Capital Fund project). This would be a project sale. Examples include:

- A sportsman’s club giving $500 to purchase ammunition or equipment for summer camp
- A donor giving $1,000 for camperships
- A donor giving $5,000 for the printing of recruiting materials

Money received for a project sale must be spent on the agreed upon project. If the money is not used for the project, we are required return the money to the donor.
• Like Gift in Kind donations, your campaign will receive credit for a Project Sale only if the gift is budget relieving.

Ask Events

“Mayor’s Breakfast” and “Breakfast for Scouting” events are Ask Events. At these breakfast events a presentation about the benefits of Scouting is given and attendees are “asked” to make a pledge to the Friends of Scouting campaign.

These ask events are a part of a district’s Community FOS campaign. Done early in the year, they are a great way to get the Community campaign to get off to a fast start.

Some people are not comfortable in asking others for donations, so at an ask event one person asks many potential donors – like a Family FOS presentation. Campaign workers serve as table hosts. They invite people they know to be their guest at the event.

Ask events are different from “special events” like lawn socials, sporting clay events and golf outings in that tickets are not sold to attend. But for ask events, it must be communicated to guests that donations will be requested at the event.

Files for Mayor’s Breakfast events

---------------------

Friends of Scouting Planning & Management

FOS is like any other important task – you need to start with a plan, recruit the personnel to carry out the plan, and then FOLLOW THE PLAN!

Summary of FOS Campaign Steps

1. Clean Up Previous Year’s Donor List

2. Conduct Prospecting & Evaluation Meeting
   • Identify new donor prospects to replace lost donors
   • “Clear” all new donor prospects

3. Set FOS goals to support the council budget

4. Recruit volunteers to serve on the campaign team
   • District Executives working without a volunteer team, will not be able to attain the FOS goal
   • Each district will require a different number of volunteers
   • Most volunteers will be unable/unwilling to contact more than 5 potential donors or do more than 5 presentations (this is the basis for the “IC5” method of fundraising)
• Your target would be to have 1 volunteer per 5 donors or 1 volunteer per 5 units. Some volunteers will be able to handle more than 5, some less.
• You will also need volunteers that specialize in helping with the clean up phase of the campaign. These are usually not people that have already contacted their 5.

5. Conduct Kickoff Meetings

• District Volunteers
  o At the November or December District Committee and Commissioner meetings, ask volunteers to support the campaign by making a pledge
• Community Campaign
  o Ask campaign workers make their pledge to the campaign
  o Select donor prospects that they will contact
  o Review timeline and dates for progress meetings
• Family Campaign
  o Train volunteers on who to do presentations
  o Ask campaign workers to make their pledge to the campaign
  o Assign volunteers to specific units
  o Review dates already scheduled & ask volunteers to contact units not already scheduled
  o Explain reporting & turn in process

6. Conduct Regular Progress Meetings

• Meetings lead to Progress
  o Most people will make their donor contacts shortly after a meeting or shortly before the next meeting.
  o Without these meetings, volunteers will delay making their contacts
• Recognition
  o Make sure to recognize volunteers for progress they have made during meetings or during communication between meetings
  o Recognition of progress will push other volunteers to make progress so they will be recognized

Detailed FOS Campaign Steps

Analyze Prospect Lists & Family Presentations

• Review the last year donor data – look for duplications
• Remove donors that have asked to be removed, passed away or permanently moved out of the area
• Review last year’s presentation results – did the presenter do a good presentation? Was there inclement weather? Was it held outside of our recommended time frame?
Conduct Prospecting & Evaluation Meetings for the Community Division

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

II. WHY THE CAMPAIGN
   • Council Finance Needs
   • District Fair Share
   • Community Share

III. PURPOSE OF MEETING
   • Importance of a good prospect

IV. *TYPES OF CAMPAIGN GIFTS
(Use only those used in your district)
   A. Large Gifts- $1,000+
   B. $500 to $999
   C. $250 to $499
   D. $100 to $249

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

Example

<table>
<thead>
<tr>
<th>Giving Level</th>
<th>Donors Needed</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1,000+</td>
<td>5</td>
<td>$ 5,000</td>
</tr>
<tr>
<td>$500-$999</td>
<td>20</td>
<td>$10,000</td>
</tr>
<tr>
<td>$250-$499</td>
<td>50</td>
<td>$12,500</td>
</tr>
<tr>
<td>$100-$249</td>
<td>75</td>
<td>$ 7,500</td>
</tr>
<tr>
<td>$50-$199</td>
<td>100</td>
<td>$ 5,000</td>
</tr>
<tr>
<td>$25-$49</td>
<td>125</td>
<td>$ 3,125</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$ 43,125</td>
</tr>
</tbody>
</table>
V. PROSPECT AND EVALUATION PROCEDURE

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

• Look for possible upgrades from the lower levels into one of the larger gift levels. Examine large gift donors and determine if any prospects need to be moved down.

• Add new prospects from the list below:

1. “New People List”
2. Associates of P & E Committee
3. Telephone book (a must for non-United Way communities)
4. Civic club rosters
5. Banks - board of directors
6. Industrial plant management
7. Country club rosters
8. New businesses
9. Chamber of commerce lists
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

“Clearing” New Prospects

Before any new donor prospects are asked to support Scouting, they must be “cleared” first through the development department. They will check the different campaigns (FOS, Endowment, Giving Hearts, Capital) to make sure the new prospect is not already a donor in another campaign or district. If they are already a donor, a discussion will be held to determine the appropriate way to ask them for support and where any donation would be credited – BEFORE the ask is made.
Goal Setting Process

After the district has conducted the analysis of last year’s campaign and have completed the Prospecting and Evaluation meeting(s), each district is asked to submit minimum and maximum goal recommendations. These recommendations are then compared with past performance, changes in population, and the fair-share of the council budget. The final goal should fall somewhere between the low and high goal recommendations that the district submitted.

FOS Goals for 2020 (for submitting district goal suggestions)

Kickoffs

One of the tenets of fundraising is – You cannot sell another person until you have first sold yourself. There are a few opportunities to have a “kickoff”:

- Council employees making a pledge during the October staff meeting
- District volunteers making a pledge during the November or December district committee and/or commissioner staff meeting
- Community FOS volunteers making a pledge at the first meeting
- Family FOS presenters making a pledge during the Presenter Training

Everyone that is involved in Scouting at the district level should be given the opportunity to contribute during the “Leadership” phase of the FOS campaign.

Regular Campaign Meetings

The people that you have working on your campaign are busy people. It is no surprise that they will do their volunteer work right before and right after the FOS campaign meetings.

As the campaign manager, you need to make sure that the meetings are scheduled and happen. If there is too much time between meetings, the campaign will lose momentum and stall out.

- “When the meetings stop – the money stops coming in”
- Communicate with your volunteers:
  - Share progress reports between meetings (via email)
  - Meeting reminders (via email)
Friends of Scouting Volunteer Recruiting

A successful Friends of Scouting campaign needs one thing – having enough of the right people on your FOS team. Ten people on your team can and will raise more money than if you only have five. It’s that simple.

Volunteer Positions to Fill for a Successful Campaign

**District FOS Chair**
- Recruits up to five people (Community Chair, Family Chair, Breakfast Chair(s), Steering committee members)
- Presides at the P & E meeting and Steering Committee meetings

**Community FOS Chair**
- Recruits up to five people (Breakfast Chair(s) & campaign workers)
- Represents the district at Council Report meetings for the Community division
- Presides at meetings with community division workers

**Community Workers**
- Visits with five donors to ask them to support Scouting

**Breakfast Chair**
- Works with the district executive to set the date, time and location of the breakfast
- Recruits five vice-chairs or table hosts
- Secures an MC for the event (or is the MC)

**Breakfast Table Hosts**
- Invites 12-15 friends to a breakfast, with the goal of having at least 7 guests in attendance

**Family FOS Chair**
- Recruits up to five people (presenters)
- Participates in the Family presenter training conducted by the council
- Conducts training for presenters that missed the council training
- Works with presenters to schedule family presentations
- Ensures that presenters have the materials they need

**Family FOS Presenters**
- Works with assigned units (no more than five) to schedule a presentation during the recommended time frame
- Participate in Presenter training
- Secure materials from the Family FOS chair
- Give the presentations as scheduled
- Report results immediately after the presentation

*Individual position descriptions and/or guidebooks are available for all the positions listed above*
### Volunteer & Field Staff Responsibilities

#### VOLUNTEERS

<table>
<thead>
<tr>
<th>RECRUITING</th>
<th>FIELD STAFF</th>
</tr>
</thead>
<tbody>
<tr>
<td>RECRUITS TEAM</td>
<td>PROMOTES RECRUITING</td>
</tr>
<tr>
<td>PROSPECTS</td>
<td>TAKE NOTES &amp; CLEAR PROSPECTS</td>
</tr>
<tr>
<td>IDENTIFY</td>
<td>SCHEDULE &amp; PROMOTE MEETINGS</td>
</tr>
<tr>
<td>TRAINING</td>
<td></td>
</tr>
<tr>
<td>TRAIN VOLUNTEERS</td>
<td></td>
</tr>
<tr>
<td>ENROLLING</td>
<td>KICKOFFS, REPORTS &amp; CLEANUP</td>
</tr>
<tr>
<td>CONTACT DONORS</td>
<td></td>
</tr>
<tr>
<td>RECOGNITION</td>
<td>SECURE RECOGNITION ITEMS &amp; KEEP RECORDS</td>
</tr>
<tr>
<td>RECEIVE &amp; PRESENT RECOGNITION</td>
<td></td>
</tr>
<tr>
<td>LEADERSHIP</td>
<td>CAMPAIGN MANAGER</td>
</tr>
<tr>
<td>CAMPAIGN CHAIRPERSON &amp; WORKERS</td>
<td></td>
</tr>
</tbody>
</table>

#### FOS Tips for Field Staff

### General Campaign Concepts

- The recruitment of enough qualified volunteer leadership on or before predetermined deadline dates is the single most important element of the annual campaign process.

- Recruiting – you haven’t recruited a worker until their name, address, and phone number are on a personnel enlistment form.

- There are no shortcuts in raising money. Follow the plan.

- In Friends of Scouting, you do not secure contributions, you sell contributions!

- Letters do not sell contributions or raise money in any way – do it face-to-face.

- People give to people - but be certain the right person is calling on the right person.
• In solicitations (especially larger ones), experience shows that two campaigners get three times as much as one campaigner.

• Ask for a specific contribution. Don’t be bashful or apologetic.

• You cannot sell another person until you have first sold yourself.

• All workers, at all levels, must know what Friends of Scouting is about.

• Record every pledge! – you are the manager of the campaign and need to know which donors have been contacted and which donors have not been contacted

• 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.”

• The money is there, and we will get it – if we follow these TEN COMMANDMENTS:

  1. Plan
  2. Recruit
  3. Organize
  4. Inform
  5. Train
  6. Sell
  7. Inspire
  8. Give Thanks to All
  9. Analyze Results
  10. Start Planning for Next Year

• As important as anything is our determination and desire to do the job.

Community Campaigns

• Work is done right before and right after campaign meetings – so you need to schedule regular campaign meetings

Family Campaigns

• Schedule presentations with every unit (we are not only asking the people that benefit from Scouting to support the council, we are also explaining how the council supports them)

• Presentations for Troops should be held in November, December, January or February

• Presentations for Packs should be held in January, February or March – no later than that

• Make sure the presenter is prepared and has the materials needed
• Communicate to the presenter the expectation that they will report on the presentation right after it is done and turn in results with 2-3 days of the presentation

• Presentations must be short (no more than 10 minutes)

• Encourage everyone to complete a pledge card, even if they can’t/don’t want to give

• Follow up with any families that didn’t turn in a pledge card.

---

Scheduling Family FOS Presentations

• Get calendars from units – look for the dates of their Blue & Gold Banquet or Court of Honor (if these are scheduled between November – March, those should be the date of the presentation)

• At your October, November or December Roundtable:
  - Have a unit list (big chart) to have leaders write in date, time & location for the presentation
  - Explain how having a presentation and meeting a minimum amount will help the unit qualify for FREE rank advancements (after meeting a few other requirements)
  - Any unit that give you a date are entered in a drawing
  - Winner of the drawing receives a $25 certificate to use in the Scout Shop (get certificates from Darrell Utke)

• At the beginning of the month of the unit’s presentation, the council will mail a “warm up” letter to all parents of registered Scouts. **With out having dates schedule at least one month in advance, these letters can’t be mailed.**

• At least two weeks before the scheduled presentation, someone (Family FOS Chair, presenter or DE) should confirm the date, time and location. **Units sometimes reschedule meetings without notifying you.**

• At the beginning of the month after the unit’s presentation, the council will mail a “follow up” letter to parents of registered Scouts that didn’t turn in a pledge card. **It is important to get pledge cards turned in before the letter goes out, or else some people that have already given may receive a letter.**
COUNCIL DEVELOPMENT TEAM RESPONSIBILITIES

Major Gift Emphasis

If local council funding is to keep pace with the ever-increasing demands of growing budgets needed to provide a quality Scouting program, it is vital that councils develop a “Major Gift Mentality”. Councils need to aggressively cultivate and solicit major gift donors in all phases of their annual FOS campaign.

What is a major gift? It varies by community and organization. If the largest gift received last year in a particular campaign phase was $2,000, then any gift of $1,000 or more would be a major gift. However, if the council consistently generates gifts in the $10,000-$15,000 range, the major gift threshold logically should begin at $10,000. Even in the district phase, $1000 should be the major gift threshold – and if districts are not receiving gifts of this amount and more, it should be the objective in future campaigns.

Research is key to the effective cultivation of the prospect and ultimate receipt of the major gift.

Special Events

In our council, the Development team will coordinate the following special events, with assistance from district field staff as needed:

- **Lawn Socials** – We hold annual Lawn Socials in Fargo, Grand Forks and Bismarck.
- **Good Scout Award Luncheon** – is conducted annually in Fargo.
- **Golf Tournament** – is conducted annually in Minot.
- **Other Types of Special Events**
  - Heroes and Leaders Gala in Fargo
  - Sporting Clays in Western North Dakota

United Ways

Our council receives funding from United Ways across North Dakota and Minnesota. The Development team is responsible for writing the proposals and coordinating the representatives at the allocation hearings. District field staff may be called on to provide local success stories and to help recruit local volunteers to be at the allocation hearings.

Due to travel time, district field staff will be required to represent the council at United Way agency meetings.

Year-End Clean Up Mailing

This mailing is directed to previous contributors who were not contacted in the personal solicitation phase. This mailing is done through the council office and uses labels and pledge cards generated from the FOS records using the fundraising software program.

Grants
The Development team will write grant proposals for larger gifts. Your district may solicit gifts from small local or family foundations, but you need to talk with the Development team before writing any grant proposals.

**Endowment Gifts**

The Development team will work on getting gifts to go into the council endowment fund.

**APPENDIX**

**Position Descriptions**

*Below are links to files stored on SharePoint*

- **District FOS Chair**
- **Community FOS Chair**
- **City Chair/Captain**
- **Enroller**
- **Breakfast Chair**
- **Table Host**
- **Family FOS Chair**
- **Presenter**

**Campaign Management Tools**

*Below are links to files stored on SharePoint*

- **Goal Planning Worksheet**
- **FOS Goals for 2020**
- **Donor Assignment Form – for workers**
- **Audit Report – turn in with cards**
- **Audit Report – district records**

**Benchmarks:**

<table>
<thead>
<tr>
<th>Month</th>
<th>Goal Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kickoff</td>
<td>&gt; 10% of goal</td>
</tr>
<tr>
<td>February</td>
<td>&gt; 25% of goal</td>
</tr>
<tr>
<td>March</td>
<td>&gt; 50% of goal</td>
</tr>
<tr>
<td>April</td>
<td>&gt; 75% of goal</td>
</tr>
<tr>
<td>May</td>
<td>&gt; 90% of goal</td>
</tr>
<tr>
<td>June</td>
<td>100% of goal</td>
</tr>
</tbody>
</table>