



BOY SCOUTS *of* AMERICA
NATIONAL
FOUNDATION

2 0 0 9 A N N U A L R E P O R T



Letter From the Director



Mission

The mission of the BSA Foundation is to generate and create funds that support the Boy Scouts of America locally, nationally, and internationally, and to work with local councils, donors, families, and advisers to find creative ways to make these gifts and meet their personal giving needs.

Purpose

The Foundation helps find new sources of support for the BSA and provides donors with flexible and effective ways to realize their charitable goals using donor-advised funds, charitable trusts, scholarship funds, and many other types of gifts. We provide oversight of these gifts for maximum effectiveness and encourage donors to support the aspects of Scouting *they* want to support. Donors are also encouraged to involve other family members in their philanthropy. Many charities show donors how to pass their valuables to others—we think it is just as important to help our donors and friends also pass their *values* to others.

The year that ended December 31, 2009, was an exciting year for the Boy Scouts of America and its National Foundation. It was a year of change. For the first time, the BSA had an assistant Chief Scout Executive for Development. Also, many of the Foundation staff found themselves in a new Office of Philanthropy, focusing on some of Scouting's most generous and visionary philanthropic partners. We think that with our new focus—and our new staff members, many new to the BSA as well—we are more efficient and effective than ever.

It was a year of accomplishments. The Foundation helped prepare the business plans, proposals, and strategies for what became the largest gift to the Boy Scouts of America in its history. Over the next several years, this gift will provide funding to the BSA to develop its spectacular new property in West Virginia as a high-adventure facility, permanent home for the national Scout jamboree, and so much more. These efforts not only laid the groundwork for future gifts to this incredible project, they helped raise the bar on what was considered a major gift to Scouting, both nationally and locally. It became a peerless example of how—and why—the Boy Scouts of America was equally worthy as colleges, universities, and others of receiving transformational gifts that could propel it into the future.

Thank you to Wayne Perry for his leadership as chairman of our Foundation Advisory Committee over the last two years. Thank you also to Howard Bulloch, who will take the reins and serve as our new chairman. We all look forward to “continuing the journey” under Howard's leadership.

We stand at the crossroads of Scouting's second century. More than ever, America's youth and the BSA's local councils need the support and vision of our donors. We remain especially grateful to so many of you who continue to ask about—and create—new donor advised funds, charitable trusts, values-based estate plans, gift annuities, and other gifts for Scouting. Thank you and, as always, we can't thank you enough.

A handwritten signature in black ink, appearing to read "Colin V. French".

Colin V. French, J.D., LL.M.
Director

The WP Society

This recognition is reserved for transformational gifts for Scouting and our local councils—gifts with a minimum value of \$25 million. We are proud to recognize the following members for 2009.

Wayne and Christine Perry
S. D. Bechtel Jr. Foundation

Scout Philanthropy Society

Major gifts that make a major impact on Scouting are of the highest priority to the Foundation. We would like to thank these very special members of the Scout Philanthropy Society.

\$10 Million and Up:

Ed and Jeanne Arnold
Wayne and Christine Perry
Anonymous

\$1 Million and Up:

Donald and Marie Belcher
Rick and Janet Cronk
Albert and Chris Hanna
Gerald I. Lawhorn
Henry Rosenberg Jr.
Milt and Adele Ward

Highlights of 2009 Foundation Distributions

Program Support

\$161,728 from the Ed and Jeanne Arnold Advised Fund to local councils in Lancaster, Pa., and Phoenix, Ariz., to provide Scouting to disadvantaged and inner-city youth.

\$240,000 designated to the Aloha Council in Honolulu, Hawaii, to support the Pacific Basin Scouting program in numerous islands—some of the most difficult areas to access in the world.

\$51,000 from the Milt and Adele Ward Fund for general support of Scouting in Tucson, Ariz., and Albuquerque, N.M.

Scholarships

\$63,000 from the Donald and Marie Belcher Scholarship Fund for college scholarships to Eagle Scouts from the Pasadena, Calif.; San Diego, Calif.; and Appleton, Wis., areas.

\$49,000 from the Hansen and Mary Hall Scholarship Fund for college scholarships to Eagle Scouts from numerous local councils.

\$10,000 from the Al and Chris Hanna Scholarship Fund for college scholarships to Eagle Scouts in the Weston, Wis., area.

Emergency Funds and Disaster Relief

\$353,000 in emergency funds to 12 local councils as part of a multiyear commitment to help them hire or retain critical youth-serving executives.

\$120,000 to help fund a storm shelter and restore Little Sioux Scout Ranch, wiped out by a deadly tornado that claimed the lives of four Scouts, to the Mid-America Council, Omaha, Neb.

Regional Funds

\$220,335 from Regional Funds to support various initiatives and needs in numerous local councils as recommended by the Regional Trust Committees of the four regions.

World Scouting

\$463,279 from World Scouting funds to provide support to the World Scout Foundation, specific Scouting associations in need, and other World Scouting initiatives as recommended by the International Committee.

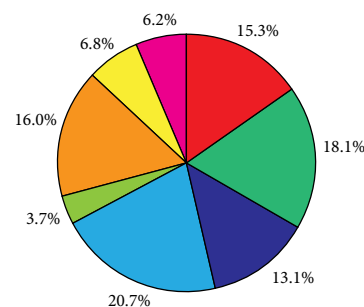
National Scouting Museum

\$640,063 from the Museum Endowment Fund for the support, operations, and upgrades to the National Scouting Museum in Irving, Texas, and for the Adventure Base 100 traveling museum exhibits.

Charitable Remainder Trusts

\$540,629 to numerous individual beneficiaries of charitable remainder trusts managed by the Foundation.

BSA Foundation Categories of Expenditures (2009)



Charitable Remainder Trusts	\$540,629
National Scouting Museum	\$640,063
World Scouting	\$463,279
Emergency and Designated	\$732,000
Scholarships	\$131,900
Discretionary Funds	\$565,945
Donor-Advised Funds	\$241,033
Regional Funds	\$220,335

Total funds distributed: \$3,535,184 (as of December 31, 2009)

Does not include gift annuity or pooled fund assets. These programs are overseen and administered by the Foundation, but the funds are held by the Boy Scouts of America.

Donor and Charitable Gift Services

We offer and accommodate a wide variety of gifts to support the needs of our donors, families, and advisers.

Donor Advised Funds

These funds are popular philanthropic tools for donors and their families to create a fund and recommend annual distributions to local councils, Scouting programs, and even non-Scouting charities. The Foundation also provides oversight of all expenditures and reports back to the donors.

Charitable Trusts

The Foundation serves as trustee for many charitable remainder trusts and charitable annuity trusts. These trusts provide immediate tax-deduction benefits, annual income to beneficiaries, and a remainder gift for the BSA (or other charities) when the trust ends.

Major Gift Planning

We also provide technical assistance and advice on a wide range of gifts, including gifts of stock and land, bequests, life estates, gifts of IRAs and insurance, tangible personal

property, and many other effective ways of giving. This assistance is available for BSA local councils and individual donors.

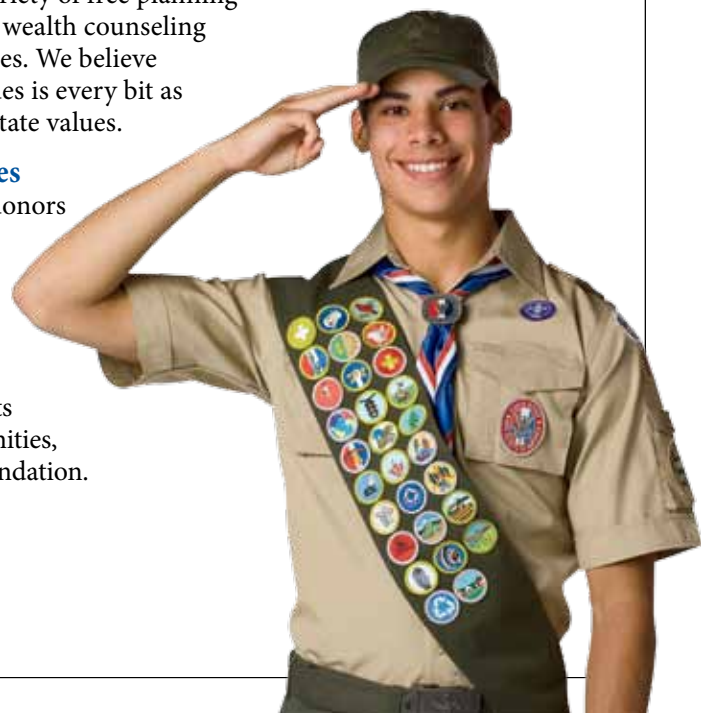
Family Wealth Counseling

The Foundation offers a variety of free planning resources and confidential wealth counseling for donors and their families. We believe that preserving family values is every bit as important as preserving estate values.

Charitable Gift Annuities

These popular gifts allow donors to make a gift to Scouting and, in return, receive lifetime income and other tax benefits.

For more information on these and other types of gifts and philanthropic opportunities, please contact the BSA Foundation.



Current BSA Foundation Priorities

One of our highest priorities is to accommodate donors who want to help the BSA local councils, programs, and Scouting initiatives *they* want to support. Of course, the BSA also has some priority programs and initiatives as part of its current National Strategic Plan. Many are offered and funded at the local council level as well as nationally. Some of these specific needs include:

1. Field of Interest Funds—The BSA has committed to some exciting new programs, training, collaborations, and initiatives in four critical areas for our youth and our communities:

- a. Hispanic Initiatives and Outreach
- b. Healthy Living and Childhood Obesity
- c. Conservation and Environmental Initiatives
- d. Science, Technology, Engineering, and Math (STEM)

2. Scholarships for Youth—As college tuition becomes increasingly expensive, it is more important than ever to help our best Scouts take that next step toward becoming great citizens and accomplished leaders.

3. The Summit Bechtel Family National Scout Reserve—Our spectacular new facility in West Virginia, now being developed as a high-adventure base, national Scout camp, and permanent home for the national Scout jamboree, will also include a leadership and training center and much more.

4. Existing High-Adventure Programs and Facilities—This includes Philmont Scout Ranch, Northern Tier National High Adventure Base, Florida National High Adventure Sea Base and Brinton Environmental Center, as well as numerous local council high-adventure programs and facilities.

5. Circle of Giving—A significant new giving and recognition society for donors who make (or commit to) a large annual gift to the Foundation, in support of Foundation initiatives or their local council (or councils) of choice.

6. Chairman's Club—Our highest level of giving and “donor concierge” service, with unique recognition and donor opportunities.

Gifts may be used to support immediate needs for these and other projects or to establish endowments for long-term or perpetual support.



BOY SCOUTS OF AMERICA
**NATIONAL
FOUNDATION**

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National Foundation**
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The BSA National Foundation is a public charity,
recognized as tax-exempt under IRC Sec. 501(c)(3).

Foundation Philosophy

We believe that all aspects of the Scout Oath and Scout Law should be an integral part of the operational standards and philosophy of the BSA Foundation. At the heart of this philosophy is the first point of the Scout Law: trustworthy. We believe we have a responsibility to our donors, their advisers, and their families, and that they expect the following from us:

- The freedom to support the BSA local councils, entities, and approved programs, projects, and initiatives of their choice
- The chance to learn more about the BSA and its priorities
- Lasting and meaningful relationships from their gifts rather than brief, transactional relationships
- Full disclosure as to the use and purpose of their gifts and continuing information as to the impact of those gifts
- Dealings with the Foundation that are private and confidential, with all public recognition related to a gift explicitly approved by the donors
- Prompt and accurate gift acknowledgments and an understanding that all our communications and actions reflect upon the BSA as a whole
- Information as to the investment performance of all Foundation assets, both general and specific to their gift or fund
- A commitment to teamwork within the BSA so gifts will have maximum impact

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Tyler, Texas
Matthew Devore,
Portland, Ore.
Larry C. Abbott,
Phoenix, Ariz.

BSA Foundation Staff

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Executive Director
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Major Gift Advisor
Paula S. Rhea
Executive Assistant