Annual Campaign Plan Book
Guidelines for Developing a Comprehensive Council Annual Fund-Raising Strategy
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Introduction

Fund-raising for charitable organizations is much different today than it was 10 or 15 years ago, and there will be more changes as we move into the future.

A number of factors have contributed to this changing climate:

- The growing number of causes and organizations competing for the charitable dollar.
- Inability of many United Ways, as a traditional source of funding for many organizations, to keep pace with increased funding requests.
- Increasing annual operating budgets as a result of inflation and expanding programs.
- Donor expectations of greater accountability from non-profit organizations due to several recent highly-publicized negative events.
- Donor insistence on being given the opportunity for more individual choice in their charitable giving.

The trend in total philanthropic giving in the United States has continued to increase over the years. From 1974 through 2003, charitable donations have grown from $26.8 billion to about $241 billion. Individuals are the largest source of charitable gifts, representing 74.5% of all gifts. When bequests are included in this giving total, individual gifts represent an overwhelming 84% of all philanthropic donations!

Because of the increasingly competitive climate, it is vital that local councils develop a comprehensive annual fund-raising strategy. This Annual Campaign Plan Book has been developed to support councils in successfully integrating the several separate components into a coordinated total plan.

TIMELINE FOR COUNCIL ANNUAL FUND-RAISING STRATEGY

The timeline shown below is a graphic representation of 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 the other components in the council’s comprehensive fund-raising strategy can be integrated into a coordinated total plan.
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<td>Staff FOS Training Conference</td>
<td>Council and district campaign steering committee meetings Monthly – September through December Twice a month – January through April</td>
<td>Complete analysis of campaign giving and leadership</td>
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<td>Complete Scout Family enrollment</td>
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<td>Executive board adopts revised budget for next year</td>
<td>Draft budget w/staff &amp; volunteer involvement</td>
<td>Executive Board adopts Planned Budgeting model</td>
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Chapter One

Friends of Scouting Campaign

The Boy Scouts of America has earned the reputation over the years of being one of the premier charitable organizations in the traditional annual giving campaign arena. This reputation is a reflection of the planning, execution, and completion of successful FOS campaigns in hundreds of councils across America. This success is a result of the efforts of a vast legion of dedicated and committed Scouting volunteers and their professional associates.

A comprehensive FOS campaign should be the solid foundation of every council’s annual campaign for operating funds. In 2003, FOS produced $131.1 million of income for councils, averaging 22% of council income. FOS is the largest single revenue source for the majority of councils nationally.

This chapter will not attempt to detail every step in conducting a successful FOS campaign. The Friends of Scouting Campaign Resource Manual, #35-802 provides the necessary detailed information for organizing and conducting the campaign.

- Each council should prepare its own FOS campaign manual that becomes the master plan and road map for the campaign. Everyone involved needs to understand that it is the “blueprint to success” and is the basis for conducting all phases of the campaign.

- The annual staff FOS training and planning conference serves as the launching point for the campaign. Here the total council professional staff is exposed to the campaign plan and timetable. Smaller councils have found it beneficial to conduct this training in cooperation with neighboring councils (cluster training) to benefit from the expertise and exchange of ideas of a larger group. Refer to the FOS Staff Planning Guide at our Web site www.fsd.org.

- At the heart of any successful campaign is the early development of a comprehensive and complete campaign timetable. This should include every campaign date from the victory celebration (that’s right, the first date to be planned is the date for celebrating success), and the target for recruiting the council FOS chairman to the various division kickoffs, and the closing campaign critique meeting. The majority of successful councils plan to reach their FOS campaign goal no later than June 30th.

- It is important to keep in mind that for successful fund-raising there is no substitution for people asking other people they know. The Independent Sector reported in Giving & Volunteering in the United States that “81% gave when personally asked by someone they knew well”.


Telemarketing/Phone-a-thon

Telemarketing, commonly known as a phone-a-thon in Scouting terminology, is becoming an increasingly popular component of a totally integrated campaign strategy.

The phone-a-thon is most often used in the Scout Family phase of the enrollment as a part of the “cleanup” following a traditional I-C-5 approach, or group presentation, for those who were not contacted or are unaccounted for. It can also be used to contact parents in those units that have declined participation in either of the above mentioned formats.

Another effective use of the phone-a-thon is in the year-end cleanup phase of the campaign. Those previous contributors who have not responded in the current campaign are targeted for a final opportunity for renewal.

When considering conducting a phone-a-thon there are several points to keep in mind:

1. They can be set up and conducted quickly—don’t drag on.
2. A large number of prospects can be contacted in a short period of time.
3. Although manpower intensive, they are efficient because of the number of contacts which can be made per person.
4. Be sure the calling location has sufficient outside phone lines to accommodate the number of callers you anticipate.
5. Recruit sufficient manpower in order to handle the pledge confirmation and billing function so they can be mailed the following day.
6. Anticipate that pledge collections will be less than experienced in the traditional FOS campaign. Plan for a 75-80% collection rate.
7. The phone-a-thon is an ineffective method to raise money from new donors. In an Independent Sector survey 83% stated they would not give a positive response to a phone call solicitation, no matter who was calling.

Corporate Matching Gifts

With no additional manpower requirements and a minimum of additional expense, councils can increase campaign revenue through the corporate matching gifts program.

Many local, regional, and national companies have incorporated a matching gift component into their total corporate charitable giving strategy. Participating companies view their offer to match an employees’ personal gift to qualified organizations as a vehicle for encouraging employee giving to worthy causes.

It also helps focus the firm’s support of programs in the communities where they have a presence – thereby enhancing their reputation as a good corporate citizen. Each company establishes their own criteria regarding the types of organizations they support. A common eligibility requirement is an IRS 501c (3) designation. Many companies match on a dollar for dollar basis and some many even match on a 2:1 basis.
Foundation Grants

While not a specific campaign, the solicitation of foundation grants to help underwrite the annual council operating budget is often closely integrated into the annual FOS campaign process. This is especially true with respect to the more modest grants made by local small family and private foundations. Often their support is renewed through personal contact by an enroller without the formality of submitting a written grant request.

Foundation grants represent 11% of total charitable giving in America. However, in 2003 it represented only 3% of total council income. These statistics point up the fact that foundations represent a largely untapped resource for the majority of councils.

Although local family foundations have smaller assets and may make smaller grants, there are many more family foundations than any other type. Usually they have no paid staff, and family members often comprise the board and make the funding decisions. They are less formal and structured than the larger foundations, so it is often easier to submit a request and quicker to receive a decision.

Key to success in securing foundation grants to support the councils’ program is adequate and in-depth research. First you must identify the foundation and determine their stated purpose and area of interest and support. This also includes determining any geographic restrictions to their grants, i.e. only in X community, only in Y county, only in Z state.

Once these steps have been completed, it is time to draft the outline for writing the grant proposal or request. The Foundation Resource Manual, #35-530, and the Proposal Companion (see FSD Web site) contain a wealth of information and proven techniques for preparing effective proposals. It covers in detail the research phase, and lists some of the existing resource tools available. Additionally, it includes several sample proposals as examples of style for format.

Local foundations have a vested interest in the local area and want to support those programs that are going to maintain or improve the quality of life in that specific geographic area. Often a new program or special project can be the door opener for continuing support from a foundation. Councils need to understand this “local interest” perspective with many local foundations and capitalize on it as a source of new and increased financial support.

Excellent resources for identifying potential foundation gifts can be located in most libraries. These resources such as community, state and foundation directories are excellent. It is also worth obtaining copies of annual reports and IRS Form 990 from companies, universities and organizations (both profit and non-profit). To begin writing a proposal, use the helpful checklist on pages 34-37 in the BSA Foundation Resource Manual. Also, there are a number of successful grant proposals on a broad range of topics found on the Web site, www.fsd.org or directly from the Finance Impact Department.

For matching gifts, details and companies with portal matching gift programs, visit the FSD Research Portal and click the matching gift button.

Councils will have to do additional research to expand the list to include local firms in their service area that also have a matching gift program.

Once the list has been developed, it requires an educational program to inform your donors and prospects that they can apply for a matching gift if they are employed by one of the listed firms. Often the list is published in the council newsletter with a brief explanation of how the matching gift program works. The list, with instructions, should be included in the enroller’s kit and appropriate mention made at campaign kick-off meetings and during Scout Family presentations.
The procedure for securing a corporate matching gift is initiated by the employee who obtains the matching gift application form from the company human resources or personnel department. After the employee completes the form, it is forwarded to the council with their contribution. The council completes the form verifying receipt of the employee contribution and they then forward it to the corporate headquarters where the matching gift check is issued to the council.

How “the ask” is structured is equally important in the total strategy. Key points to keep in mind include:

1. A two-person volunteer/professional team is best.
2. The volunteer is the “door opener” and requests the appointment.
3. Be flexible – set the appointment at the prospect’s convenience.
4. Always meet on the prospect’s turf – their home, office, club or favorite restaurant.
5. The volunteer makes the verbal “ask” concise and to the point. Generally not more than 30 words!
6. After the ask, be quiet! As painful as the silence can be, the prospect needs time to consider the request.
7. No’s come quickly. A yes is slower. The prospect is considering the request and to what extent they can respond to the request.
8. No one and no organization has a 100% success rate.
9. A “no” does not shut the door. It creates the opportunity for a future ask.

Although major gift requests can and do take place anytime during the year, plan to ask for these gifts in January through May. By following this schedule, the council’s operating income is assured early in the year. If the major gift request is to fund a new program, the earlier you secure a commitment, the sooner the program can get underway.
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.

National surveys have shown that major donors are comfortable financially, but not necessarily considered rich or wealthy. The profile of a typical major donor is:

1. Over 50 years of age.
5. Pro-American.
6. Believe in the free enterprise system.

A long-time, regular annual campaign donor at a modest level, with the above characteristics, is an excellent major gift prospect. If they have had a personal involvement in Scouting, either in their youth or as an adult, they are even a better prospect!

Research is key to the effective cultivation of the prospect and ultimate receipt of the major gift. Determining their interests and capacity to give will guide you in strategizing the request. If their interest is with disabled or exceptional children explain what the council is doing to serve them. Should their interest be in the area of education tell them about the Learning for Life program or Scouting’s comprehensive volunteer training program.

When approaching a major gift prospect, don’t approach it like you are “just asking for a big contribution” to support Scouting. You want to convey to the prospect that this is a great opportunity to give of themselves to help others.
Chapter Three

Direct Mail Campaign

Direct mail fund-raising in the last 30 years has grown from a concept viewed with considerable skepticism to a major industry. For many charitable organizations, it represents their major fund-raising effort and generates millions of dollars annually.

Direct mail fund-raising is accomplished using one or more of the following formats:

1. New donor acquisition.
3. Renewal of low-end donors.
4. Year-end clean up phase.

Many councils use direct mail at some point during their campaign. Since its inception hundreds of councils have used the direct mail approach as a method of new donor acquisition. These councils employ a direct marketing firm who coordinates up to five mailings a year to names that meet a certain profile in selected zip codes. Those that respond are added to the council’s donor list for subsequent renewal mailings. Donors above a certain level are usually placed in the appropriate council or district campaign for personal solicitation.

Direct mail is sometimes used in urban communities to gain access to certain “unapproachable” prospects. This would include exclusive condominium and high rise apartment complexes, retirement communities that house many past and present Scouters, “gated” developments catering to wealthier residents. Generally, these mailings are done in-house or by a local direct mail company. These mailings are spread throughout the year.

A growing number of councils use direct mail as the vehicle for renewing low-end donors. Generally, past contributors of $50 or less are placed in this campaign. Because the volume is small, these mailings are usually done in-house, and mailed later in the spring as the district campaigns are concluding.

The fourth format used is the 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 fund-raising software program.
Chapter Four

Project Sales

The basic purpose of a project sales campaign is to secure financial contributions to meet established budget needs. By identifying those components that make up the annual budget, and matching those needs with interested prospects, a council is able to mount a project sales campaign.

Project sales fund-raising is increasing in popularity. When a project is readily understood, donors can quickly identify with the project and tend to be more willing to support it. Last year councils realized $4.9 million through project sales in support of their annual operating budgets.

A project sales campaign may be the only way to secure support from those who are reluctant to contribute to traditional campaigns. They have a need to closely identify with their investment and know that it will provide specific support of a particular program or activity.

Upgrading current contributors is another advantage of project sales. Often an FOS contributor can be upgraded to a higher level of giving by appealing to their special interests. If their interests are in advancement, invite them to provide the Eagle Scout Awards. For those interested in long term camp, suggest they underwrite the camp promotion materials.

Often project sales can result in a gift-in-kind. This is where a donor contributes the actual items in lieu of cash. To provide the necessary budget relief for a council it is important to know that the in-kind items would have been purchased if not otherwise donated. Gifts-in-kind can also be a way for FOS supporters to make an additional gift to the council.

Complete details on conducting a project sales campaign, including several sample presentations, can be found on the Finance Impact Department’s Web site www.fsd.org or in the Project Sales Manual, #35-603. The project sales campaign is generally conducted early in the year, concurrent with the FOS campaign.
Chapter Five

Special Events

Special event fund-raising as a significant source of annual council operating budget support has grown during the previous five years to $41.7 million. Currently it represents 7% of total council operating income.

Distinguished Citizen Award Dinners

Distinguished citizen award dinners (or luncheons) are the most popular special fund-raising events in councils. The gift level varies, but generally is in the $150 to $500 per person range. In many councils distinguished citizen award dinners are conducted on a district level.

These dinners can be scheduled at any time throughout the year, depending on council preference. Generally, the fall United Way campaign time period is avoided.

Golf Tournaments

Golf tournaments are the second most popular fund-raising special event conducted on both a council and district level. They are generally held late April through mid-October except in the South.

Golf tournaments have the ability to attract donors who don’t participate in the annual FOS campaign. Annual givers to the FOS campaign may often participate in a golf tournament without decreasing their annual support. Businesses will likewise support both because they view golf tournament participation as a business cultivation or public relations expense rather than a charitable contribution.

Lunchorees

Several metropolitan councils – notably New York, Chicago, and Detroit – have developed the lunchoree concept into a major source of revenue. A lunchoree is a variation of the distinguished citizen award dinner concept. Generally, it is built around an industry or group of closely related industries. An outstanding leader in the industry is selected as a recipient of the Scouting/industry award, which is presented at the luncheon. Often a national personality or industry leader will be the keynote speaker at the lunchoree.

The lunchoree leadership and solicitation manpower comes from firms comprising the industry. Prospects are other companies in the industry and their suppliers. In many cases companies consider their participation a business expense not subject to the guidelines and budget restrictions of a charitable contribution and not diminishing their annual FOS gift.

Auctions

Gaining in popularity not only with councils but also with other non-profit agencies is the auction. Auctions can range from black tie events with a glittering array of upscale items to a less formal event with a wide range of attractive items from sports celebrities, movie stars and other persons of national prominence.

A different type of auction highlights Scout memorabilia. The success of this auction is determined by the amount of memorabilia donated by Scouters and supporters. Sometimes the council can provide items such as old camporee and camp patches, mugs and other event-related souvenirs.

Auctions are held year round except during the United Way campaign period.
Other Types of Fund-Raisers

In addition to the previously mentioned fund-raising activities, listed below are a number of other events that can also be very successful. They include art shows, theater benefits, fashion shows, fishing and tennis tournaments and clay-shooting tournaments.

If you would like additional information on these activities, contact the Finance Impact Department for more information.

When considering whether or not to host a special event, include the suggestions below in your decision-making process.

1. Special events are not a “quick fix” to a council’s need to increase operating income. A well-planned and executed special event will require adequate manpower. In some cases they can be much more labor intensive than the traditional FOS campaigns.

2. Be sure that the proposed event is cost efficient. If projected expenses approach 50% of the donors’ gifts, it may not be prudent to conduct the event considering the “bottom line” benefit to the council.

3. Golf tournaments, as well as many other special events, attract many individuals and their money to the “event”. Their participation is not motivated by an interest in and desire to support Scouting. In many cases, their contributions are not renewable outside the special event.

No matter what the event do not miss the opportunity to tell the Scouting story to the participants. Be sure to use youth members in appropriate ceremonies and testimonials, have Scouting literature available, and have council officers personally on hand.
Chapter Six

WORKPLACE CAMPAIGNS

Similar in concept and operation to the United Way campaign conducted among employees of a business, the workplace campaign presents the opportunity of telling the Scouting story to employees of a cooperating business.

Although limited in the opportunity for implementation in many councils, the workplace campaign presents an efficient format for contacting a specific group of individuals. Detroit, MI, Pittsburgh, PA and St. Louis, MO have been successful in this approach.

To be able to conduct a workplace campaign, it is necessary to secure approval from the top management of the targeted business. The best company prospects are those firms where a member of their top management (chairman, present, CEO) is a member of the council executive board. Next would be a business where a BSA board member serves on that firm’s board, or is a peer and personal friend of a member of the top management of the targeted business.

The leadership for the workplace campaign would come from the company’s employees. Generally, the company president would select someone from top management to be the chairman. Often this person identifies with Scouting and currently is active in some capacity.

Each participating company would structure the campaign to best fit their situation. This often parallels the company’s organization by department or function. The key leadership would need to attend training the campaign plan, time schedule and their specific job responsibilities just as is done in the traditional campaign. The company would determine who would participate - only top management through a certain level of middle management or all employees.

There should be meetings with the employees to tell them about the Scouting program. Personalize the presentation by involving employees who were Scouters. At the conclusion of the meeting, the employees are asked to complete their pledge cards.

A number of participating companies may not want to set up a payroll deduction program for handling the collection of pledges. Pledges will either have to be paid in full at the time they are made or the council will have to set up the desired billing sequence following the regular procedure provided through the fund-raising software program. An alternative approach would be to have the company add Scouting as an option on the company annual giving campaign pledge card.

Workplace campaigns are conducted early in the year concurrent with the traditional FOS campaign, in order to be able to project income and cash flow and to give the employee donor the opportunity to spread pledge payment over a reasonable period.