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FINANCE IMPACT DEPARTMENT

WHO WE ARE

The Finance Impact Department, led by Chris Wolfe, assists BSA councils by analyzing, developing, and executing plans to adequately fund their operating, capital, and endowment needs. The department is comprised of two teams, the Fiscal Management Team and the Council Fund Development Team.

Fiscal Management Team

The Fiscal Management Team provides councils with resources and support in the areas of accounting, governance, and good stewardship through on-site support, training courses, sharing of best practices, and resources for non-profit accounting.

Council Fund Development Team

The Council Fund Development Team is comprised of Scouting professionals with proven track records of raising operating, capital, and endowment funds in councils of all sizes and demographic makeup. The team assists local councils with all phases of fund-raising planning and execution, including staff and volunteer training, campaign planning, feasibility studies, campaign discipline and coaching, and major gifts development.

MISSION STATEMENT

The Finance Impact Department, in collaboration with volunteers representing areas,

regions, and the National Council of the Boy Scouts of America, provides direct support to local councils so that they meet their operating, capital, endowment, strategic funding, and fiscal stewardship needs to accomplish their community service objectives.

KEY GOALS

- Provide support to enhance the revenue generation, fiscal capacity, and governance needs of local councils.
- Make available to local councils up-to-date resources designed to enhance fund-raising campaigns, with a donor-centered, mission-driven approach. Emphasis is placed on direct support forms of income to local councils, specifically Friends of Scouting, project sales, foundations and trusts, special events, and direct contributions for capital and endowment purposes.
- Coordinate preferred vendors of products for use by local councils in developing product sales campaigns. Facilitate dialogue of best practices and techniques related to efficiently-conducted campaigns.
- Serve as the liaison to the United Way of America, in an effort to provide insights to local councils on how to best build strong relationships with local United Ways and other workplace giving programs.
- Provide fund development and fiscal management-related training to BSA personnel (volunteers and staff) at all levels of the organization, which will enable them to more effectively achieve the operating, capital, endowment, strategic funding, and fiscal stewardship objectives of local councils.
- Serve as a key resource to those councils with critical funding and fiscal management issues, and emphasize providing the necessary support to ensure positive outcomes within those councils.
- Provide analysis of local council financial outcomes, and communicate those key performance indicators to stakeholders, who can have impact on improving performance.
- Deliver information consistently to stakeholders related to the development and fiscal management functions of local councils, while encouraging dialogue on best methods used throughout the not-for-profit sector, and industry trends.
- Provide high-quality software and other tools that support strong financial recordkeeping and fiscal management, as well as quality donor-tracking and contribution records.

FINANCE IMPACT DEPARTMENT STAFF



CHRIS L. WOLFE
DEPARTMENT MANAGER

With the reorganization of the BSA National Council staff, Chris L. Wolfe became the department manager for the newly-formed Finance Impact Department on September 1, 2008. He is responsible for the financial health of local councils and the related National Council support mechanisms for governance and accounting support, as well as funding methods and models.

A 29-year career-veteran of the Boy Scouts of America, Wolfe, an Eagle Scout, joined the Scouting movement as a district aide in 1981 in Hagerstown, Maryland, where he served a traditional district and as an Exploring executive. He advanced to the council headquartered in Denville, New Jersey, as the Exploring executive and Exploring executive – multiple-person, providing direction to executives serving Scouts with special needs. As

the Exploring executive, he also served as summer camp program director, camp director, and reservation business manager. Wolfe was promoted to assistant Scout executive in Toms River, New Jersey, in 1987. In 1990, he was promoted to finance director with the Chicago Area Council, and became the chief financial officer the following year. His career then led him to Kansas City, Missouri, in 1997, where he served for nearly nine years as the controller/business manager.

Wolfe joined the National Council in 2006 to serve as the authority on local council accounting, and supported councils on fiscal management issues. In August of the same year, he was promoted to the position of director, within the Council Administration Service to lead Scouting professionals who served as subject experts for software support and issues related to council administration. He assumed responsibilities as director of Customer Support Services within the Information System Division in March 2007.



JOLYNN G. KUSER
ADMINISTRATIVE ASSISTANT
Jolynn G. Kuser joined the National Council as an administrative assistant in February 2008.

Her primary responsibilities include providing administrative support to the department manager and fiscal software administrator. Kuser is also responsible for reconciling the department's three-cost-center

budget, coordinating travel arrangements for the department, maintaining the department's attendance report, and office supplies.

A certified paralegal, Kuser has an extensive background working as an administrative assistant.



GARY A. BEUS

FISCAL SOFTWARE ADMINISTRATOR

Gary A. Beus began his new assignment at the National Council in the Finance Impact Department on January 1, 2010, when the regional offices relocated to

Irving, Texas. Beus has a strong background in understanding technological needs of local councils. His primary responsibility is the development of a new fiscal management software to support local councils' record keeping, which is scheduled to release in 2011.

The new software will replace the current general ledger, accounts payable, and payroll software. It will be web-based and will feature enhanced capabilities in areas of reconciliations, reporting, work flow, and much more.

Beus begin his career with the BSA in 1973. He has served as a district executive, district executive multiple-person, field director, and director of support services in local Boy Scout councils in Washington, District of Columbia; Albemarle, North Carolina; Charleston, South Carolina; and Birmingham, Alabama.

Prior to accepting his current position, Beus held the following positions in the Southern Region – associate regional director for council administration, associate regional director for program, and assistant regional director for support.





FISCAL MANAGEMENT TEAM



BRIAN L. SINDERS
FISCAL MANAGEMENT TEAM LEADER
Brian L. Sinderson became the team leader for the Fiscal Management Team, comprised of four fiscal management specialists, on September 1, 2008. His responsibilities include developing

resources and providing support to BSA councils regarding accounting procedures and policies, training local council personnel in governance and good stewardship, providing on-site support, and sharing of best practices and resources for non-profit accounting.

An Eagle Scout and Vigil member of the Order of the Arrow, Sinderson began his Scouting career in 1976 as a district executive for the Crossroads of America Council in Indianapolis, Indiana.

Sinderson became a district executive in the Northeast Illinois Council in Highland Park, Illinois, in 1982; and in 1986, he was promoted to program director in the same council.

He became the field director in 1989 for the Gulf Ridge Council in Tampa, Florida.

In 1993, Sinderson assumed the responsibilities of director of support services for the Greater Cleveland Council in Cleveland, Ohio, and while in this council, he also served as director of field service. He was later selected to serve as Scout executive for the Chester County Council in West Chester, Pennsylvania.



MADELINE H. MONROE
ADMINISTRATIVE ASSISTANT
Madeline H. Monroe joined the Finance Impact Department in September 2008 as the administrative assistant for the Fiscal Management Team. She assists the team in the preparation of various reports,

and provides support to team members with year-end close, key financial indication analysis, audits received, and year-end operating fund surplus/deficit reports.

Monroe coordinates the fiscal management training courses, including Fiscal Management I, Fiscal Management II, the accounting specialist workshops, and the Fiscal Management Team's webinars and teleconferences.

With more than 30 years of service to the Boy Scouts of America, Monroe has served as retirement specialist, secretary to the associate director of compensation and benefits, and benefits specialist with the Compensation and Benefits Division.



CORNELIA ELLIS
FISCAL MANAGEMENT SPECIALIST

Cornelia Ellis joined the Finance Impact Department in September 2008 as a fiscal management specialist. Ellis is responsible for training local councils' accounting specialists in the BSA's accounting practices and SellWise procedures, and is responsible for ensuring local councils' audits are in compliance with BSA standards.

She started her career with the Greater New York Council in November 1981, where she held many positions, including manager, camping services S/A, and as business manager for Ten Mile River and Cub World summer camps.

In 1995, she was promoted to the George Washington Council in Pennington, New Jersey, as the service center manager.

Ellis joined the Northeast Region in January 1997 as the council administration specialist. In this position, she monitored council accounting and audit information, and maintained up-to-date information on BSA office systems, business procedures, and accounting practices. She assisted local councils in general ledger, personnel, and fund-raising, including telephone support, training, and council visitations.

In 2005, she became an associate regional director, serving 72 councils in the region, and assisting council administrative executives and local councils in all council software, including telephone support, training, and council visitations.



SHERRY McFALL
FISCAL MANAGEMENT SPECIALIST

Sherry McFall began her career at the National Council in the Information System Division in 2006. She joined the Finance Support Division in 2007 and became a fiscal management specialist in the newly-formed Finance Impact Department within Council Operations on September 1, 2008. Her current responsibilities include conducting fiscal management training, accounting specialist workshops, Fiscal Solutions Breakfast Club conference calls, and webinars. She is also responsible for the *Local Council Accounting Manual*, and the *General Ledger and Accounts Payable Policies and Procedure Manual*.

McFall began her career with the BSA in March 1984 with the Western Reserve Council in Warren, Ohio, where she held many positions, including registrar, fund-raising clerk, and accounting specialist. In 1993, the council merged with two other councils to form the Greater Western Reserve Council, where she held the position of finance director.

In 1994, McFall moved to the Greater Cleveland Council in Cleveland, Ohio, where she held the position of business manager and was responsible for all accounting, purchasing, budgeting, and support staff management.



**KEN M. MORAN JR., CPA
FISCAL MANAGEMENT SPECIALIST**

Ken Moran joined the Finance Impact Department as a fiscal management specialist in January 2009. His responsibilities include providing support to local councils with mergers and consolida-

tions, audits, IRS Form 990, non-profit GAAP compliance, personnel and payroll, and payroll tax. He has primary responsibility for the *Local Council Guide to the Audit*.

Moran has more than 14 years of experience in non-profit auditing, accounting, and taxation. He worked with McGladrey and Pullen LLP, in Richmond, Virginia,

where he served as an audit manager specializing in non-profit auditing, accounting, and taxation.

He became familiar with Boy Scouts' accounting policies and procedures after leading the audit engagement for the Heart of Virginia Council in Richmond, for three consecutive years.

In 1997, Moran left McGladrey to start his own accounting firm, and during this time, he served as the controller of the Heart of Virginia Council for more than seven years.



**CAROLYN S. OAKS, CPA (INACTIVE)
FISCAL MANAGEMENT SPECIALIST**

Carolyn S. Oaks begins her new assignment with the National Council as a fiscal management specialist in July 2010. Her primary responsibilities include training local councils' accounting specialists in the BSA's account-

ing practices and SellWise procedures. She has an extensive background in accounting, employee benefits, and retirement plan administration.

Oaks began her career in 1981 as a staff accountant for St. Vincent's Medical Center of Richmond in Staten Island, New York. In this position she was responsible for the budgeting and analysis of monthly performance. She later served as a public accountant from 1984 to 1986 for Pannell Kerr Forster of New York, New York, and Pershing & Yoakley, CPAs in Knoxville, Tennessee. In these positions, she consulted with various non-profit organizations on budget preparation and accounting systems, performed audit and feasibility studies, evaluated internal control, and projected future profitability.

She later served as a chief accountant for Hewgley's Music Shop, Knoxville Gastroenterology Group, and Fort Sanders Regional Medical Center from 1986 to 1990. Oaks worked as a functional group leader in retirement plans administration for the Kimberly-Clark Corporation from 1990 to 1996. In this role, she was responsible for the day-to-day administration of defined benefit plans. Before joining the BSA, she was employed with the following third-party administrators: The Trust Company, LBMC Employee Benefits Group, and Financial Service Associates as an employee benefit specialist from 1996 to 2003. She prepared valuations of defined contribution plans consistent with the plan documents, ERISA, and other federal benefits and tax laws.

Oaks joined the Great Smoky Mountain Council in Knoxville, Tennessee, in October 2003 as an accounting specialist responsible for the accounting and finance activities including payroll, accounts payable, general accounting, budgeting, and preparing monthly financial statements for the council.



COUNCIL FUND DEVELOPMENT TEAM



MARK MOSHIER
COUNCIL FUND DEVELOPMENT TEAM LEADER

Mark Moshier joined the BSA National Council in May 1997, and became the team leader for the Council Fund Development Team in the Finance Impact Department in September 2008.

Moshier is responsible for the development of programs, plans, methods, and materials to help local councils successfully carry out a comprehensive year-round fund-raising strategy, including annual operating campaigns, and capital needs and endowment development.

An Eagle Scout and Vigil member of the Order of the Arrow, Moshier began his career in 1977 in the Chief Cornplanter Council in Warren, Pennsylvania.

In 1981, he was promoted to district executive in the Minsi Trails Council in Allentown, Pennsylvania, and in 1984, he became an Exploring director in the same council. Moshier became the assistant Scout executive for the Susquenango Council in Binghamton, New York, in 1986.

In 1989, Moshier was selected to serve as the Scout executive for the Genesee Council in Batavia, New York. He guided the council through merger plans in 1994, and was selected to serve as the Scout executive of the newly-formed Iroquois Trail Council in Lockport, New York.

He is accredited as a certified fund-raising executive by CFRE International.



DEVI DEAVER
ADMINISTRATIVE ASSISTANT

Devi Deaver is an administrative assistant for the Council Fund Development Team. Deaver's responsibilities include communicating with council personnel, as well as coordinating the training preparation for the Council Fund Development Team's workshops and seminars, including the National

Major Gifts Art Tour, Professional Development Level I, BSA Development and Fiscal Management Symposium, and the Local Council Fund-raising Campaigns workshop.

Deaver joined the Boy Scouts of America in March 2001. Prior to joining the Finance Impact Department, Deaver served in Cashier Services and then as an administrative assistant in the Finance Support Division.



PATRICE EULIN
ADMINISTRATIVE ASSISTANT

Patrice Eulin joined the Finance Impact Department in January 2010, when the regional offices relocated to Irving, Texas. In addition to providing administrative support to the Council Fund

Development Team, Eulin is the editor of the Finance Impact Department e-Letter and develops promotional materials for the team.

Eulin joined the Southern Region staff in May 2001 as the administrative assistant for the deputy regional director. She then served as the administrative assistant for the

finance department, providing support for the senior regional endowment counsel, regional endowment counsel, and associate regional director of finance.

Eulin has an extensive background in desktop publishing. Before joining the Boy Scouts of America, she worked as a desktop publisher with Georgia Quick Start, creating training materials for new and expanding industries moving to the state of Georgia as part of the governor's economic development program.



LAWRENCE "LARRY" CROUCH
DEVELOPMENT SPECIALIST

Larry Crouch joined the National Council in January 2009 as a development specialist on the Council Fund Development Team. Crouch's responsibilities

include providing support to local councils with fund-raising campaigns. His expertise is in fund-one income streams, especially Friends of Scouting, project sales and gift-in-kind, foundation, and direct-mail campaigns. He is a strong proponent of donor-marketing efforts, as well. Crouch facilitates the training of local councils' finance professionals by conducting finance roundtables, BSA National Development and Fiscal Management Symposium, annual giving campaign feasibility (preparedness) studies, PD-L1 class, and the Local Council Fund-raising Campaign workshop.

An Eagle Scout, Crouch began his career in 1984 in the W. D. Boyce Council in Peoria, Illinois, where he served as a district executive, district director, and finance director.

In 1999, he was promoted to finance director for the Milwaukee County Council in Milwaukee, Wisconsin. Crouch was promoted to director of finance service in 2000, and in 2005 to director of fund-raising and marketing, also in the Milwaukee County Council.

Crouch is an accredited, certified fund-raising executive by CFRE International. He serves on the board of the Dallas chapter of the Association of Fund-raising Professionals (AFP), and is a presenter at the International Conference of Fund-raising Professionals.



DONALD "DON" DAY
DEVELOPMENT APPLICATIONS SPECIALIST
 Don Day joined the Council Fund Development Team in January 2010 as the development software specialist. He is the team's liaison for the development (fund-raising) software interface with the

Information Systems Department. Day is responsible for online donor-research tools; provides Web site support for the Finance Impact Department Resources Web site (in MyBSA), Friends Asking Friends Web site, BSAGift-Plan.org Web site, and online giving tools and support for Scoutingfriends.org Web site; and provides training for the development (fund-raising) software.

Day, an Eagle Scout and a Vigil Honor member of the Order of the Arrow, started his career with Boy Scouts of America in 1988, in Vermilion, Ohio, with the Firelands Area Council as a district executive. He was promoted to senior district executive in 1990.

He joined the Heart of Ohio Council staff in Ashland as finance director in 1994. Day later assumed the responsibilities of director of support in the Heart of Ohio Council and served there through June 2004.

In July 2004, he became the associate regional director of council administration for the Central Region.



LYNN M. GUNTER
DEVELOPMENT SPECIALIST
 In October 2008, Lynn M. Gunter joined the National Council as a development specialist with the Council Fund Development Team. Gunter provides services and resources to enhance local council efforts in meeting their operating, capital, endowment, and strategic funding needs, with an emphasis on capital campaign support, including feasibility studies, readiness analysis, and case statements.

Gunter embarked on a new career with the Boy Scouts of America in 2001, as a district executive with the Grand Teton Council in Idaho Falls, Idaho, after retiring from a

20-year-service in the retail industry. He was promoted to endowment director in 2002 in the same council.

Gunter became the director of development for the Grand Canyon Council in Phoenix, Arizona, in 2005, and was later promoted to director of finance service.

He was selected to serve as an associate regional director for the Western Region in Tempe, Arizona, prior to accepting his current assignment.



JAMES R. JOHNSON
DEVELOPMENT SPECIALIST

James R. Johnson joined the National Council in April 2010 as a development specialist with the Council Fund Development Team. He provides services and resources to enhance local council efforts in meeting their operating, capital, endowment, and strategic funding needs. Johnson's emphasis is in fund-one income streams, especially Friends of Scouting, project sales, gift-in-kind, foundation, and direct mail campaigns.

An Eagle Scout, Johnson began his career in 1985 in the Gulf Coast Council in Corpus Christi, Texas. He served there as a district executive, senior district executive, and field director.

In 1996, he was promoted to finance director for the Alamo Area Council in San Antonio, Texas.

Johnson was promoted to endowment director in the Capital Area Council in Austin, Texas, in 1999, and in 2003, he became the director of field services in the same council.

In 2007, he was promoted to the position of director of finance service for the Sam Houston Area Council in Houston, Texas.



HAROLD M. KELLER
DEVELOPMENT SPECIALIST

The newest member of the Council Fund Development Team, Harold M. Keller joined the Finance Impact Department as a development specialist in May 2010. Keller is a strong proponent of fund-raising, with a focus on fund-one income streams, especially Friends of Scouting, project sales, gift-in-kind, foundation, and direct mail campaigns.

Keller began his service with the BSA in November 1985 as a district executive with the New Orleans Area Council in Metairie, Louisiana. He later served as senior exploring executive, senior district executive, field director, and the finance director in Metairie.

He then moved to the Chickasaw Council in Memphis, Tennessee, where he served as senior field director, special position executive, district director, and finance and marketing director. During his service with the Chickasaw Council, he received accreditation as a certified fund-raising executive (CFRE) and served on the board of the Memphis chapter of the Association of Fund-raising Professionals.

From March 2006 to May 2010, Keller served with distinction as Scout executive of the Tuscarora Council in Goldsboro, North Carolina.



**C. ROBERT "BOB" MYERS
DEVELOPMENT SPECIALIST**

Bob Myers is a development specialist with the Council Fund Development Team. He was named associate director of the BSA National Foundation in February 2008, and in September, with the restructuring of the BSA national

staff, he was aligned with the Finance Impact Department. In this position, Myers is responsible for the National Major Gifts Art Tour; the major gifts and donor seminars; National Major Gifts Award, Bronze, Gold and Platinum records; Major Gifts Digest; and other promotional materials.

Myers began his professional Scouting career in Oakhurst, New Jersey, and was promoted to district director in Rochester, New York. He left the Scouting profession for several years, to work in sales in the trade show industry, but remained active as a commissioner and board member, and in various unit leadership positions.

In 1991, he became the program director in Boston, Massachusetts, and in 1992, he was promoted to assistant Scout executive. Myers became a director of support services in 1993, and the following year, he took on the role of planned giving director. Myers was promoted to director of finance and marketing services in 1997 in Baltimore, Maryland.

From October 2002 through January 2008, he served successfully as a Scout executive in Utica, New York. During his tenure, the endowment fund increased from \$2.6 million to \$5 million. The council was created by a merger early in 2002 and he led with a comprehensive strategic planning process and management system.

Myers is a certified wealth counselor candidate with The Heritage Institute.

