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FRIENDS OF SCOUTING—THE COMMUNITY APPEAL

Friends of Scouting – The Community Appeal: Quick Access Guide

This Quick Access Guide has gathered the most frequently used main topics surrounding a successful Friends of Scouting Campaign and puts them at your fingertips. Simply click on the topic of your choosing and you will be transported to that section in the book.

If you are looking for this book's normal Table of Contents, flip to the next page.

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Introduction

The key to success to any community appeal is the recruitment of quality volunteers and using them effectively. The council's community appeal plan is specifically designed to accomplish just that. Recruit the right people, lead them well, use the power of influence, give them a job at which they can be successful, recognize them, keep them to the timeline, thank them, keep them focused, recognize them, thank them, recognize them, and thank them.

Objective

This manual is to assist you in planning and conducting a successful appeal.

Community Appeal Strategy

Strategy

1. **Steering Committees**—The steering committee membership should be top-level volunteer representatives of the entire service area. Each service area's Friends of Scouting chairman should be a member of the steering committee.

The function of this group is to ensure that each district steering committee has adequate leadership. Each district steering committee should help determine (with preplanning by the professional) the structure of each districts' appeal. The committee's function is:

- Recruitment of appeal leadership to meet the appeal structure needs of each appeal,
- Improvement of the overall prospect list through
 - Addition of prospects,
 - Rating and evaluation of prospects,
 - Assignment of prospects to workers.

For more information, see The Steering Committee.

2. **District Organization and Structure**—Each district professional should evaluate the previous year's appeal and, with the district/local steering committee, ensure that the leadership needs of each appeal are met. Proven structures may include I-C-5 (or other variation), blitz day, group appeal, or ask event.
3. **Volunteer Leadership**—Your district will achieve its goal if the right volunteers are recruited, those who have and should use their personal and business relationships to benefit Scouting. The right volunteer should successfully recruit a great community appeal chairman who, in turn, should recruit the appropriate appeal leadership for the local structure. Appeal leadership and workers should be responsive to an influential appeal chairman—not the staff adviser. Quality volunteer leadership from the top down is the key to success.
4. **Scouting Professional Leadership**—The staff adviser's role is to work with his/her volunteers to identify the very best appeal leaders to recruit into the various positions. *He or she should insist that the appeal plan be followed and that they recruit only the best volunteers.* The adviser then supports and manages each team to the successful completion of their goals. The staff adviser keeps the appeal on track by following the plan, using volunteer influence to influence others, developing relationships with volunteers, keeping volunteers accountable through recognition and reports, and by constantly thanking and recognizing volunteers.

5. **Appeal Kickoff and Appeal Leadership Meetings**—Your district fund development chairman, district Friends of Scouting chairman, and your community appeal chairman are expected and should be recruited to attend the appeal kickoff, report, and victory celebration meetings. If a volunteer cannot attend, the district finance chairman or community appeal chairman should represent him/her. Volunteers should deliver all reports. The district Friends of Scouting chairman should hold and host regular district FOS meetings to be attended by the community appeal chairman (and other appeal chairmen—family, project sales/gift-in-kind). Ideally, these should be held over breakfast or lunch at his/her office.

6. **Prospect Assignment**—Prospects assigned to returning appeal workers should remain assigned to those workers if those prospects have a history of giving. Prospects who did not contribute in the previous year's appeal, but are currently assigned to a worker, may be reassigned by the steering committee if they feel the prospect can be worked more successfully by another worker. Unassigned prospects should be available to workers for selection. ***New prospects must be cleared before they can be worked.*** New prospects may be from anywhere without regard to district boundary. The new prospect generation process is addressed in The Steering Committee.

Goal Setting

Each service area should have a community-appeal base goal founded on the previous year's accomplishment, percent of goal attained, and historical trend developed by council/district volunteers in conjunction with council needs. The district community appeal chairman and staff adviser then should meet to set local appeal base goals, based on structure and a fair portion of the overall council goal. Each team should be asked to set its own stretch goal, which should be a minimum of a 15-20 percent increase over the base goal.

Community Appeal Structure

District Structure

Each service area should plan their appeal structure, following the council plan, based on the needs of its communities. With volunteers and staff leaders, districts should “map” their districts, defining the appeal structure, goals, and volunteers needed for each of their various community appeals, based on:

- History
- Funds needed, and
- Current volunteer structure.

Appeal structures may include:

- I-C-5 (or other variation)
- Blitz day
- Group appeal, or
- Ask event.

Team Organization

Each district should have a Friends of Scouting chairman and a community appeal chairman.

I-C-5 Appeal

The I-C-5 Appeal is a structure that implies that each appeal worker, at any level, only sees or manages five prospects (or secures five gifts). In an I-C-5 Appeal, the Friends of Scouting chairman and a community appeal chairman working in conjunction with the steering committee (for more information, see the steering committee), should recruit adequate leadership and workers to complete the appeal. Each member of the effort is asked to secure five gifts. These can be in the form of five historical prospects or 15 new prospects.

Your community appeal structure is determined by the number of communities and prospects you have. Below is a sample structure chart for a appeal with 50 prospects. *If a appeal has more than 250 prospects, community majors, co-chairs or zone chairs should be recruited, each responsible for up to five community captains.*

[I-C-5 ORGANIZATIONAL CHART]

I-C-5 Variations

Based on the size of the community, the newness of the appeal, or the number of prospects that need to be worked, a structure might include an I-C-4 (or I-C-3) structure or other variation.

Blitz Appeal

A blitz appeal is one in which the same preparation work must take place, but the appeal actually takes place in one day. A scenario would include a kickoff at a breakfast meeting, workers take five cards and work them during the morning, report meeting at lunch as to the amount raised, workers take five more cards and work them during the afternoon, and a victory celebration in the early afternoon. A blitz appeal also should be a variation of an I-C-5, based on the number of prospects to be worked and number of workers needed to work those prospects. A structure for a 130 prospect appeal might be a chairman, three captains, nine workers, and 130 prospects.

Group Appeal

A variation on a blitz appeal is the group appeal, which should involve more appeal workers and usually a longer period of time. A scenario would include a kickoff meeting, workers take five cards and work them during the week, return for a report meeting a week later, workers take five more cards and work them during the next week and return for a victory celebration the following week. A group appeal also should be a variation of an I-C-5, based on the number of prospects to be worked and number of workers needed to work those prospects. A structure for a 240 prospect appeal might be a chairman, two majors, four captains, 16 workers, and 240 prospects. A group appeal can last from one to four weeks.

Ask Event

The Friends of Scouting dinner/ask event can be a phenomenal tool for you and your volunteers to maintain FOS appeal discipline with built-in deadlines, provide soft-sell approaches for volunteer workers, enable upgrading of previous contributors, and build your appeal's base. This is a free event where a table host invites previous contributors and new guests to attend personally. It's suggested that you set a minimum ask amount for those attending. Don't sell tickets or tables because this is an FOS/ask event and not a special event like a distinguished citizen dinner.

For example, if you were to set the minimum ask at \$250, you would:

- Invite all previous contributors who gave at the \$250 level and above last year.
- Include last year's contributors in the \$150 to \$249 range so you have the opportunity to upgrade them.
- Review last year's contributors who gave \$149 and below to determine those who may have the ability to increase their giving. Especially review multiple-year givers.
- Include your key volunteers in reviewing this list to identify those with the potential of giving at the \$240 level. Review all of your key volunteers and past participants in special events to determine those who you believe you can move into your annual appeal and have the potential to contribute \$240, and therefore invite them to the dinner.
- For more information, see The Ask Event.

APPENDIX

APPENDIX A—Friends of Scouting Appeal Timetable

DATE [YEAR PRIOR]	BENCHMARK
July 15	FOS Steering Committee prospect list due
Mid-August	FOS Steering Committee recruited
August Week 3	FOS Steering Committee Meeting #1 [location, time]
August Week 4	FOS Steering Committee Meeting #2 [location, time]
Early October	FOS Family Chairman and District FOS Chairman recruited FOS Community/Gift-in-Kind Chairman recruited
Mid-October	FOS Family Appeal Orientation [location, time]
Late October	FOS Community Chairman Orientation [location, time]
November 1	FOS Family Pacesetter Appeal begins
Early November	FOS Community Majors Orientation [location, time]
Mid-November	FOS Community Captains Orientation [location, time]
Early December	FOS Community Workers Orientation FOS District kickoff FOS Family Pacesetter Appeal Report Meeting [location, time]
Late January	FOS Report Meeting #1 [location, time]
Mid-February	FOS Scouting Ask Breakfast/Blitz Day/Group Appeal Kickoff [location, time]
Mid-March	FOS Report Meeting #2 [location, time]
Mid-April	FOS Report Meeting #3 [location, time]
Late April	FOS Council Victory Celebration [location, time]

Appendix B—Identification of Sources of Volunteers

Some of the sources of volunteers listed below may be appropriate for the Community Appeal. The following list, while not inclusive, offers some beginning points:

- District committee (past and present).
- Past year's high-giving individuals.
- Places of employment of council and district leadership.
- Council Board of Directors (past and present).
- Adult Eagle Scouts and volunteers who have received high recognition at the council or district level; for example, Silver Beavers, District Award of Merit, etc.
- Last year's volunteers who performed well.
- "Blocks" of volunteers from larger companies.
- Friends and associates of people who are already recruited.
- Employees of sales and service-oriented industries (banks, public accounting firms, etc.).
- New chief executive officers of companies within the council. They probably will desire to establish visibility in the community.
- For more information see: The Steering Committee

Appendix C—Identification and Recruitment of Volunteers

Identification and recruitment of appeal leadership and volunteers is the function of the Steering Committee. Their job is to recruit your community appeal chairman and gift-in-kind chairman, and to assist with recruitment of team leaders. The job of the community appeal chairman is to recruit team leaders, to help them be successful, and ensure that the goal is attained. For more information see: The Steering Committee.

General Statement if You are to Succeed.

The recruitment of sufficient, qualified volunteer leadership on or before predetermined deadline dates is the single most important element of the annual appeal process.

Identification of Number of Volunteers Needed

Carefully identify the number of volunteers needed. "Short-cutting" the number of volunteers to be recruited will minimize results.

Volunteers are to recruit and manage no more than five other volunteers.

Listed below is the number of captains and workers needed for *each* 125 prospects (as well as the impact they have on your appeal if a full team is not recruited).

5 Captains	÷	5	=	1 Major
25 Workers	÷	5	=	5 Captains
125 Prospects	÷	5	=	25 Workers
				125 Prospects
				<u>156 DONORS</u>

156 Donors x \$250* = \$39,000

*Average Community Appeal Contribution

Recruitment (Key Points)

- Recruit on or before predetermined deadline dates.
- Recruit in person—a deeper commitment is usually secured.
- Recruit with the Appeal Director (if needed). He/she can provide technical knowledge of the Council and the Appeal.
- Let the prospect know what will be expected—recruit using a job description.

Appendix D—Appeal Position Profile

Community Volunteers:

1. Ability to give a significant gift.
2. Able to manage and lead people.
3. Can accomplish tasks through people; completes projects on time.
4. Successful recruiter and delegator.
5. Believes in the Boy Scouts of America and the need to provide resources for growth. Is able to articulate his or her beliefs.
6. Active (but not overused) in the community, who knows its financial base and community leaders.
7. Possesses the qualities (and having a successful appeal experience) to be a Community Steering Committee member next year.

Appendix E—Job Descriptions

District Chairman

Objective: Assist in the attainment of the district's Friends of Scouting goal.

Key Responsibilities

- Using the council plan, recruit and manage adequate majors to conduct the district Community Appeal
- Meet with majors periodically throughout the appeal to evaluate progress.
- Meet with council community chairman and other district community chairmen periodically throughout the appeal to evaluate progress.
- Enroll yourself personally with an upper level contribution.

Throughout the appeal

Work with the professional appeal adviser:

- Analyze status of appeal progress.
- Follow steps for successful appeal completion.

Calendar

Chairman's orientation	Late October
Majors orientation	Early November
Captains orientation	Mid-November
Appeal worker kickoff	Late November
Report meeting	Late January
Community leadership breakfast	Mid-February – (for all appeal volunteers)
Report meeting	Mid-March
Report meeting	Mid-April
Appeal victory celebration	April 30, 5:30 –8 p.m. (for all appeal volunteers)

While this commitment does involve some of your time, we are more interested in your ability to use your contacts and network to solicit support for Scouting, much of which can be accomplished in the normal course of business. Please plan to attend the kickoff, report meetings, and victory celebration if possible.

Staff Adviser: [Name]

Title: [District Name] District Executive

_____ Council, Boy Scouts of America [Street Address] [City/State/Zip]

Phone: [123-456-7890] Fax: [123-456-7891]

E-mail: contactme@scouting.org

Major

Appeal Description

Friends of Scouting is the _____ Council's annual fund-raising appeal that solicits Scouting families, local community businesses, and a council appeal targeting major corporate gifts. The community appeal is part of the overall Friends of Scouting drive, which solicits individuals and small and midsize businesses throughout the community.

The appeal is led by a community chairman and supported by the Boy Scouts of America professional staff. Each team of five solicits approximately 25 historical or 75 new prospects in a 12-week appeal. Each person involved in the appeal must agree to follow the practices of donor confidentiality.

Key Responsibilities

- Identify and help recruit five appeal captains
- Attend kickoff, report meetings, and the victory celebration as your calendar allows.
- Make an upper-level gift to the appeal.
- Help your team to successfully reach its goal by [date].
- Work closely with your appeal chairman and appeal director.

Calendar

Majors orientation	Early November
Captains orientation	Mid-November
Appeal Worker Kickoff	Late November
Report meeting	Late January
Community leadership breakfast	Mid-February (for all appeal volunteers)
Report meeting	Mid-March
Report meeting	Mid-April
Appeal victory celebration	April 30, 5:30–8 p.m. (for all appeal volunteers)

While this commitment does involve some of your time, we are more interested in your ability to use your contacts and network to solicit support for Scouting, much of which can be accomplished in the normal course of business. Please attend the kickoff, report meetings, and victory celebration.

Staff Adviser: [Name]
Title: [District Name] District Executive
_____ Council, Boy Scouts of America [Street Address] [City/State/Zip]
Phone: [123-456-7890] Fax: [123-456-7891]
E-mail: contactme@scouting.org

Captain

Appeal Description

Friends of Scouting is the _____ Council's annual fundraising appeal that solicits Scouting families, local community businesses, and a Council Appeal targeting major corporate gifts. The Community Appeal is the part of the overall Friends of Scouting drive, which solicits individuals and small and midsize businesses throughout the community.

The appeal is led by a community chairman and supported by the Boy Scouts of America professional staff. Each team of five solicits approximately 25 historical or 75 new prospects in a 12-week appeal. Each person involved in the appeal must agree to follow the practices of donor confidentiality.

Key Responsibilities

- Identify and help recruit five appeal workers
- Attend kickoff, report meetings, and the victory celebration as your calendar allows.
- Make an upper level gift to the appeal
- Help your team to successfully reach its goal by [date].
- Work closely with your major, appeal chairman and appeal director.

Calendar

Captains Orientation	Mid-November
Appeal Worker Kickoff	Late November
Report meeting	Late January
Community leadership breakfast	Mid-February (for all appeal volunteers)
Report meeting	Mid-March
Report meeting	Mid-April
Appeal victory celebration	April 30, 5:30-8 p.m. (for all appeal volunteers)

While this commitment does involve some of your time, we are more interested in your ability to use your contacts and network to solicit support for Scouting, much of which can be accomplished in the normal course of business. Please attend the kickoff, report meetings, and victory celebration.

Staff Adviser: [Name]

Title: [District Name] District Executive

_____ Council, Boy Scouts of America [Street Address] [City/State/Zip]

Phone: [123-456-7890] Fax: [123-456-7891]

E-mail: contactme@scouting.org

WORKER

Appeal Description

Friends of Scouting is the _____ Council's annual fund-raising appeal that solicits Scouting families, local community businesses, and a council appeal targeting major corporate gifts. The community appeal is the part of the overall Friends of Scouting drive, which solicits individuals and small and midsize businesses throughout the community.

The appeal is led by a community chairman and supported by the Boy Scouts of America professional staff. Each team of five solicits approximately 25 historical or 75 new prospects in a 12-week appeal. Each person involved in the appeal must agree to follow the practices of donor confidentiality.

Key Responsibilities

- Attend kickoff, report meetings, and the victory celebration as your calendar allows
- Solicit 15 new or five existing prospects by the leadership breakfast on February 16
- Make a gift to the appeal
- Help your team to successfully reach its goal by [date].
- Work closely with your team captain and appeal director.

Calendar

Appeal Worker Kickoff	Late November
Report meeting	Late January
Community leadership breakfast	Mid-February—(for all appeal volunteers)
Report meeting	Mid-March
Report meeting	Mid-April
Appeal victory celebration	April 30, 5:30–8 p.m. (for all appeal volunteers)

While this commitment does involve some of your time, we are more interested in your ability to use your contacts and network to solicit support for Scouting, much of which can be accomplished in the normal course of business. Please attend the kickoff, report meetings, and victory celebration.

Staff Adviser: [Name]

Title: [District Name] District Executive

_____ Council, Boy Scouts of America [Street Address] [City/State/Zip]

Phone: [123-456-7890] Fax: [123-456-7891]

E-mail: contactme@scouting.org

Appendix F

What The Team Can Earn

1 APPEAL MANAGER
1 CHAIRMAN
5 MAJORS
25 CAPTAINS
125 WORKERS
625 GIVERS

$$626 \times \$125^{**} = \$97,750$$

What the Team Can Lose

1 WORKER
8 GIVERS*

$$9 \times \$125 = \$1,125$$

1 Captain
5 Workers
40 Givers

$$46 \times \$125 = \$5,750$$

1 Major
5 Captains
20 Workers
160 Givers

$$186 \times \$125 = \$23,250$$

* Number of givers is calculated in this exercise at 8/worker.

**Level of Giving is calculated at \$125, half of the average community gift.

Appendix G

LETTER TO PRE-RECRUIT MAJORS

Dear _____;

This year, I will serve as chairman in the Friends of Scouting Appeal of the _____ Council, Boy Scouts of America. I have accepted this responsibility because I believe the Scouting program continues to shape the youth of our growing community.

The \$[] appeal is an annual solicitation among those in the community who have a special interest in the success of the Scouting program. It is conducted to supplement monies received from United Way and program fees to fund the \$2.8 million annual operating budget.

The involvement of business and community leaders like you is essential to the success of the appeal. It is for this reason, and because of your past commitment and interest in Scouting and the community, that I am asking a small group of individuals to work with me in the appeal. You would be responsible for recruiting five people to serve as captains in the appeal.

It's a good time to get involved. New and exciting programs and activities are positioned to serve an all-time high membership enrollment. Considerable time and effort have been spent by the _____ Council, Boy Scouts of America, to prepare materials and information to help us do the job and keep our time commitment to a minimum.

I wanted you to have all of this information prior to my call for your acceptance. I appreciate your consideration of this request. Let's help Scouting continue to grow and serve the youth of our community.

Sincerely,

Friends of Scouting
Community Appeal Chairman

Enclosures: FOS brochure
Position description

Appendix H

Letter of Invitation to Captain Orientation

Dear _____:

Welcome to the Friends of Scouting team! I wanted to take this opportunity to thank you for your willingness to help in this effort and let you know how important our job is.

The money we will be raising this spring will help provide a quality Scouting program in our area. As you may know, Scouting's phenomenal growth in the past few years is greater than what the United Way can support. The dollars we raise from our community make up that difference and ensure that the Boy Scouts of America can continue to serve our youth.

Your job as a captain is a crucial one. The people you get to help you will determine the success of our appeal.

As I explained when we talked, you will need to recruit five people to serve as workers to help you. I'll explain all of this at our orientation on (date), at (time) in (place). At that time, we'll give you some materials and ask you for your gift to the Friends of Scouting appeal.

Thanks again for your willingness to help in this very important effort. I'll call on _____ to confirm that you'll be at the orientation meeting.

Sincerely,

Friends of Scouting
Community Appeal Chairman

Appendix I
Agenda
Captain Orientation Meeting

- | | |
|--|---------------------------|
| 1. Welcome and Introduction | Community appeal chairman |
| 2. Why we are here: | |
| General information on XYZ council | Appeal director |
| Council highlights | Appeal director |
| What is a Friends of Scouting District appeal? | Community appeal chairman |
| 3. Community Appeal: | Community appeal chairman |
| <input type="checkbox"/> Organizational chart | |
| <input type="checkbox"/> Volunteer position description for team leader/worker | |
| <input type="checkbox"/> Appeal calendar | |
| <input type="checkbox"/> How to work a prospect | |
| 4. Prospect selection: | Captains |
| <input type="checkbox"/> Existing prospects | |
| <input type="checkbox"/> New prospects | |
| 5. Your commitment | Community appeal chairman |
| What's next? | |
| Adjourn | |

Appendix J

Agenda

District Community Appeal Team Leadership Meeting

- | | |
|-----------------------------------|---------------------|
| 1. Welcome | Chairman |
| 2. Success Stories | Selected volunteers |
| 3. Current Overall Status | Team leaders |
| 4. Reports | |
| a. Number of cards/prospects | |
| b. Number of cards worked | |
| c. Amount of money raised/pledged | |
| d. Percent of goal | |
| 5. Closing Challenge | Chairman |
| 6. Next report meeting | Chairman |



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