

# Endowment 2012

## Stewardship Report

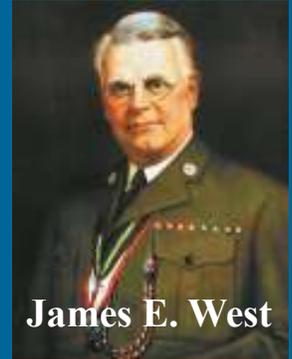
Endowment provides a permanent source of income for Scouting in our community. The Board of Directors working through its Investment Committee and fund managers, invest the assets in a disciplined manner so that prudent distributions are channeled back to support programs wherein the value of the assets should increase over time.

### Hailey's Helpers

Rafe Nobles Kotalik, a scout with Pack 777 of The Woodlands, Texas, has become an inspiration to other scouts and children within his community at just the age of six (6). He was excited to start his Scouting experience in the Summer of 2011 as a Tiger Cub. He has embraced many of the Scouting principles like citizenship, conservation, and good turn gestures from the start; developing a keen sense of the needs of his community, while also mobilizing his peers, fellow scouts, and school mates. As his belt filled with 33 loops, including ones for Good Manners, Communicating, Citizenship, Heritages, and Language & Culture, Rafe began to embody a Scout on a mission as he spearheaded a toy drive for neglected and abused children in Montgomery County. As 14 pins were added to his red Scout vest, including ones for Disabilities Awareness and Nutrition, Rafe enthusiastically mobilized the students of his school to collect more than 2,000 pounds of food for "Interfaith Food Pantry", in The Woodlands, which serves all of South Montgomery County. Rafe tirelessly assembled paper bags for more than 700 students at his school to collect and return the bags filled with food as part of "Scouting for Food". Rafe assisted with the truckload deliveries as well. He recruited his schoolmates in these charitable missions he was learning about through Scouting, and a club of more than 70 kids was formed- Hailey's Helpers.

Rafe has also laced up his running shoes each weekend to raise monies (and has run in 14 races with more on the horizon) for so many deserving causes, such as: the prevention of child abuse, research with cancer and various pediatric medical initiatives, the Spring Assistance ministries food pantry, wounded soldiers, the Shriner's Hospital, and more than \$2,000 was raised by Rafe's team for those with Lupus. He continues to work for the causes that are dear to his heart and is already coordinating a back to school supply drive for Montgomery County children in need for August.

Rafe Nobles Kotalik is a Scout who has already made an incredible impact in his community following the principles of Scouting and he shows no signs of slowing in his commitment to help others.



James E. West

### The Cockrell Foundation Matching Gift Program

The Cockrell Foundation generously created The Cockrell Foundation Matching Gift Program in 2010 and it has been renewed through December 15, 2013. Individual gifts of \$500 to \$25,000 are matched dollar for dollar. Effective in 2013, there is a \$25,000 lifetime cumulative maximum for gifts matched from a single donor.

To learn more, visit: [www.samhoustonbsa.org/endowment](http://www.samhoustonbsa.org/endowment) or contact Devin.Koehler@shac.org or (713)756-3321.

#### Investment Balance\* (in millions)

6/30/13	12/2012	12/2011	12/2010
\$32.4	\$30.9	\$26.5	\$26.0

#### Return (net)

6/30/13	12/2012	12/2011	12/2010
4.19%	11.95%	0.65%	12.27%

\* As of 6/30/2013, Permanently Restricted balance is \$22,223,563, Temporarily Restricted balance is \$6,736,665, and Unrestricted balance is \$3,449,971 for a total of \$32,410,199.

#### Dollars Distributed in 2012

General Purpose	\$800,741
Camping Scholarships	\$3,853
At Risk Youth	\$11,180
Camp Strake	\$285,226
<b>Total Distributed</b>	<b>\$1,101,000</b>

# Sam Houston Area Council 2012 Program Highlights

## Youth Served and Volunteers

**51,211** Youth members in the Traditional Scouting programs of Cub Scouts, Boy Scouts and Venturing

**8,798** Youth participants in the curriculum/school based Learning for Life Programs

**19,499** Registered volunteer adult leaders

**1,761** Total number units including Cub Scout Packs, Boy Scout Troops and Venturing Crews

**10,544** "At-Risk" youth served

## Camping

**37,493** Total number of campers at the Council's five camps

**88,454** Total number of days camped at the Council's five camps

## Impact

**222,686** Estimated hours of Scout community service projects

**21,894** Total advancements earned by Cub Scouts

**8,483** Total advancements earned by Boy Scouts

**1,155** Eagle Scouts

## Finance:

**3.5%** Percent excess revenue over operating expenses that totaled \$12,647,520

**1,680,338** Dollars in new gifts received for permanently restricted endowment

*(1) unaudited*

In 2012, achieved the Gold Level status in the BSA's National Journey to Excellence Program.

## Council Facts:



Sam Houston Area Council serves 16 counties across southeast Texas:

Austin  
Brazos  
Burleson  
Chambers  
Colorado  
Fort Bend  
Grimes  
Harris  
Madison  
Matagorda  
Montgomery  
Trinity  
Walker  
Waller  
Washington  
Wharton

## Partnerships

Community organizations representing educational, religious, non-profit, civic, and business organizations join in partnership with the Sam Houston Area Council by chartering 1,761 Scouting Units.

## Population Served

Sam Houston Area Council supports nearly 20,000 volunteers who develop and enrich the lives of over 59,000 young men and women, ages 6 through 20, over the course of a year. The Council provides volunteers a wide range of youth and adult training opportunities, including online training courses, and District and Council events.

**Mission** is "To Lead Youth to Lifelong Values, Service and Achievement".

**Vision** is to reach across the community to serve all ethnicities and youth age groups with a leadership and character-building program that has long lasting impact.