Guidelines for Unit Leadership and Reviewers of Service Project Fundraising Applications
October 2017

Audience and Scope:

This guidance is being provided for unit leadership in order to help them assist their Scouts in the preparation, submission and ultimate approval of fundraising applications for service projects, i.e., Boy Scout Eagle, Venturing Summit, or Sea Scout Quartermaster advancement. It is also for the benefit of council and/or district reviewers of those fundraising applications.

Note that Eagle and Summit service projects currently have fundraising applications as part of the respective service project workbooks. The Quartermaster service project workbook currently does not and therefore a fundraising application need not be submitted for those projects. However, it is expected that unit leadership will coach the Quartermaster candidate to assure compliance with council fundraising standards.

Introduction and References:

Most (Eagle, Summit or Quartermaster) service projects will require some degree of fundraising – either monetary, material or service-related – in order to complete the project objectives. However, BSA Guide to Advancement 2017, Sec. 9.0.2.10 (see reference below) states, "BSA prefers, in fact, that the Scouts choose projects that can be done at little or no cost." It must also be noted that service project fundraising by the Scout is not necessary in order to fulfill the leadership requirement for rank advancement, nor is it necessary in order to fulfill the service project intent of "demonstrating leadership."

When a Scout is developing a service project plan, he/she should be coached by unit leadership in applicable Hudson Valley Council guidelines and procedures, as presented herein. The Scout must also review any fundraising "procedures and limitations" information in the respective service project workbook. Note that there may be fundraising opportunities for service projects that are not available for unit fundraising.

Unit leadership should be familiar with:

- the BSA Guide to Unit Money-Earning Projects at
  http://www.scouting.org/filestore/pdf/510-274.pdf
- BSA Guide to Advancement 2017, Sec. 9.0.2.10 at
  http://www.scouting.org/filestore/pdf/33088.pdf
- BSA Advancement News, March 2014 at
  http://www.scouting.org/filestore/advancement_news/2014-March.pdf

BSA fundraising guidelines are revisited / revised from time to time and may be changed without notice. HVC will make every effort to keep this guideline current.

Although service project fundraising is conducted on behalf of the sponsor/benefiting organization, unit leadership must still approve it, whether a fundraising application is required or not.

If the Scout has questions about acceptable fundraising methods, he/she may have a preliminary discussion during the district-level project proposal review, or subsequently with the district advancement coordinator. If a resolution on a particular fundraising issue is not clear, the district coordinator should consult with the Council advancement committee so that consistent standards can continue to be applied across all districts.

This document is not intended to recite all of the do's and don'ts of service project fundraising provided in the references cited herein, but rather to clarify the current HVC positions and procedures on such fundraising.

Note that the term "fundraising" herein applies to requests not only for money, but also for "materials, supplies, tools or other needs," including professional services, in support of the project.

An accompanying guide (see Attachment) has been prepared for Scouts to receive upon district approval of their service project proposals. This should provide a quick and useful reference to help the Scout in preparation of his/her fundraising application.

Fundraising Not Requiring a Fundraising Application:

As per the applicable service project fundraising "procedures and limitations," a fundraising application is not required if contributions (of funds, materials, supplies and professional services) are made solely "from the candidate, his parents or relatives, his unit or its chartered organization, parents or members of his unit, or the beneficiary." (For clarity, contributions from the **members** of the "chartered organization" and/or "beneficiary" are also exempt from the application requirement).

However, a Scout who may be requesting contributions from these exempt sources, but also from other sources, must file an application and should list all prospective donor sources.

Process for Submitting and Approving Fundraising:

Eagle (or Summit) project fundraising applications should be submitted as soon as possible, but cannot be approved until after district review and approval of the service project proposal. The current version of the (Eagle or Summit) fundraising application from the current respective Service Project Workbook must be used.   All information must be provided, including signatures by the project beneficiary and the unit leader. As requested on the form, a list of prospective donors and what each will be asked to donate must be provided, though it is not necessary to list the names of individual friends, neighbors and family members.

Include a value for "How much money do you expect to raise?" This number should be consistent with the "Preliminary Cost Estimate" on the Scout Service Project Proposal. That value should include the cost of materials (purchased or donated), supplies, tools (purchased or rented - borrowed tools are excluded) and professional services (purchased or donated) from ALL sources. Discrepancies should be explained.

Service project fundraising applications for $500 or more must be submitted to the council office at advancement@hudsonvalleyscouting.org, AFTER the approval of the service project proposal at the district level. It will then be routed to those responsible for review and approval.

Fundraising applications for a project value of less than $500 may be submitted directly for district-level review as follows:

Delaware River: Charlie Ruiz (drdeagleboard@gmail.com)and John Gain (gainj258@gmail.com)
Dutchess: Jim Duffy (jduffy2465@aol.com)
Heritage: Sherri Raco (heritage.eaglescout@gmail.com)
Rockland: Anne Martel (rockland.eagle@gmail.com)

In these cases (i.e., projects of less than $500 value) fundraising applications may be submitted along with the project proposal for district pre-review and may be approved at the time of district level proposal review (time permitting) if:

- The project proposal is approved, and
- The fundraising application is complete (with signatures) without the need for further modification.

The application submission, review and approval process is normally managed via email, except as noted directly above. It is in the Scout's best interest for the unit leadership to help familiarize the Scout with proper fundraising procedures so that

his/her application may be processed and approved expeditiously in order to allow the Scout to move forward with the project without delay.

Fundraising application approvals by Council/District may be in the form of a simple email or a scanned copy of the approved/signed application. Either is acceptable and the Scout should be advised to include a copy of either document in the final service project report.

It is the responsibility of the Scout and the unit leadership to assure that fundraising application guidelines are followed. A Scout failing to secure an approval for a fundraising application when one is required may encounter a serious issue with his/her advancement. Guide to Advancement, Sec. 9.0.2.7 states that "jumping the gun," which could include fundraising, may require the Scout to "select a different project." In such cases, the respective district Eagle Board of Review must determine the appropriate action to be taken.

Significant changes to an approved fundraising plan (e.g., significant change in amount of funds solicited or addition of different fundraising activities) will require a revision to the fundraising application, following the process cited above.

Beneficiary Must Be Clearly Noted:

The Scout must clearly stipulate that the fundraising is being conducted on behalf of the project beneficiary by the BSA. This must be made clear in letters to prospective donors or in other promotional materials. When donation receipts are requested, they must be provided "in the name of the beneficiary," not the unit. Receipts may be provided by the unit "on behalf of the beneficiary."

At times, it might be arguable that there could be two project beneficiaries, e.g., a project for the benefit of a Little League, a veteran's organization, or a police or fire department, on property owned by a municipality. While the municipality will generally provide written approval of the project, the operating organization will typically be designated as the project beneficiary. Accordingly, fundraising should be clearly communicated to be on behalf of the operating organization, and NOT the municipality.

Once collected, money raised must be turned over to the beneficiary or the candidate's unit until needed for the project. If the unit receives the funds, it must release any excess to the beneficiary once expenses have been paid.

Acceptable Eagle Fundraising Methods:

Requests to Prospective Donors:

A common method of fundraising is to make requests, either by mail or in person, to local businesses, organizations, friends, acquaintances, and possibly local politicians.

A list of all such prospective business, organization and political donors, and what each will be asked to donate, must be provided with the fundraising application. Note that this fundraising method is allowed for

Eagle, Summit and Quartermaster service projects, but is NOT allowed for unit fundraising.

For units, fundraisers MUST provide an actual product or service in return for funds provided.

Goods and Services Fundraisers:

Common fundraisers are conducting Car Washes, Garage Sales, Baked Goods Sales, Candy Sales, Holiday Wreath Sales, Spaghetti Dinners, Pancake Breakfasts, Bowling Nights, Restaurant Profit-Sharing Nights, or Goods and Services Auctions, among others.

These are all acceptable fundraising methods. However, it must be noted that all goods or services offered for sale must be a quality product at fair market value. The price of the goods or services offered should not be in unreasonable excess of what would be paid on the open market.

Regarding fundraisers involving preparation of meals - such activities are subject to local health ordinances and should be conducted under the control of a "food service licensee." Scouts may be reminded of this but it is not for BSA to enforce.

Regarding restaurant nights, it is not unreasonable to partner with restaurants that serve alcoholic beverages along with food. However, it is not acceptable to patronize establishments whose primary business is the serving of alcoholic beverages vs. food.

Live or silent Auctions are permissible as long as they do not represent a "game of chance," e.g., a raffle, and must not involve alcoholic beverages as merchandise.

Sales of merchandise must not compete with district or council fundraising efforts, e.g., popcorn, discount cards, etc. The sale of Trails End Popcorn via the annual Council Sponsored sale is permissible. Please contact the Popcorn Advisor at the Council Service Center for details.

Crowdfunding or Solicitation *via* Other Social Media:

The solicitation of prospective donors via a social media, e.g., Facebook or fundraising websites, e.g. GoFundMe.com, is acceptable. However, the Scout, parents and adult leadership must be fully aware of "fine print" concerning the website's terms of service and fees that may be involved. In addition, there are tax liabilities to consider prior to committing to this method.

Helpful information on crowdfunding may be found at BryanOnScouting: http://blog.scoutingmagazine.org/2014/07/21/crowd-funding-sites-eagle-project-fundraising/

BSA suggests that local councils "may impose certain restrictions such as use of a certain site, or impose a dollar limit on how much may be raised." However, HVC has not imposed such restrictions to-date.

Unacceptable Eagle Fundraising Methods:

Coin Drops:

It is not acceptable in HVC to organize a "coin drop" requesting cash, either as a stand-alone method, e.g., in front of a local supermarket, or in conjunction with acceptable fundraising methods, e.g. at a car wash.

However, a "coin drop" strictly within the confines of the unit, the chartered organization or the project beneficiary is acceptable. Unsolicited donations offered to the Scout, however, need not be returned.

Raffles:

Raffles or other games of chance are not permissible BSA or service project fundraisers.

Alcohol-Related Events:

No fundraising involving the presence of alcoholic beverages concurrent with youth participation is allowed, restaurant nights, as cited above notwithstanding.

Fundraising in Uniform:

BSA uniforms should be worn when conducting fundraising programs under council contract, e.g., popcorn and discount card sales. For Eagle fundraising programs that sell goods or services, the BSA Field Uniform (Class A) or Activity Uniform (Class B) may be worn. For requesting donations of funds, materials, services, etc., a BSA uniform (Class A or B) should not be worn. This would also apply when the Scout creates a fundraising site on social media.

Recognition of Contributors:

It is highly advisable for both unit leadership and fundraising application reviewers to encourage the candidates to formally thank contributors in writing and to find opportunities to publically acknowledge those contributors.

ATTACHMENT

(The attached document should be provided to Scouts upon review and approval of their service project proposals)

Quick-Guide for Scout Service Project Fundraising

Fundraising:
- Projects may not be fundraisers.
- Whether or not fundraising takes place is the Scout's decision based on the needs of his/her project. Fundraising is not mandatory to complete the requirements to become an Eagle, Summit or Quartermaster Scout.
- Typical unit fundraisers, with which unit leadership is familiar, such as car washes, are the best options.
- The Scout must make it clear to all donors or event participants that the money is being raised on behalf of the project beneficiary, which will retain leftover funds.
- BSA uniforms should not be worn for solicitation of project donations.
- Any contracts must be signed by a responsible adult, acting as an individual, without reference to the Boy Scouts of America.
- Any products sold or fundraising activities must not include raffles or other games of chance.
- "Coin drops" are not permitted

The Form:
- Unless it involves contributions only from the beneficiary, or from the candidate, his parents or relatives, his unit or its chartered organization, or from parents or members in his unit, a fundraising application must be submitted and approved by the local district or council.
- The form must be submitted and approved **before** beginning any fundraising.
- The current version of the Scout Service Project Fundraising Application, from the current Eagle or Summit Scout Service Project Workbook must be used.
- Signatures from both the project beneficiary and the unit leader are required prior to submitting the application.
- A list of prospective business community donors and what each will be asked to donate must be provided with the fundraising application.
- Include a value for "How much money do you expect to raise?" This number should be consistent with the "Preliminary Cost Estimate" on the Scout Service Project Proposal. That value should include materials, supplies, tools (purchased or rented, not borrowed) and professional services (purchased or donated). Discrepancies should be explained.
- Forms for less than $500 can be approved at the district level, $500 or more are approved at the council level

Email Contacts:
- Council: advancement@hudsonvalleyscouting.org
- Delaware River: Charlie Ruiz (drdeagleboard@gmail.com and John Gain (gainj258@gmail.com);
- Dutchess: Jim Duffy (jduffy2465@aol.com)
- Heritage: Sherri Raco (heritage.eaglescout@gmail.com)
- Rockland: Anne Martel (rockland.eagle@gmail.com)