



## **Guidelines for Unit Leadership and Reviewers of Service Project Fundraising Applications (March 2023)**

### **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 for Scouts BSA 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 2021, 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 to fulfill the leadership requirement for rank advancement, nor is it necessary in order to fulfill the service project intent of “demonstrating leadership.”

It is also noted that, while Eagle service projects themselves may not be shared by Eagle candidates, Eagle project fundraising activities may be shared. Each Scout must submit his/her own fundraising application, indicating the arrangements for sharing donations, distribution of leftover funds, etc. All promotion for the fundraising event(s) must clearly recognize each beneficiary.

When a Scout is developing a service project plan, he/she should be coached by unit leadership in applicable Greater Hudson Valley Council (GHV) 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:

- BSA Guide to Advancement
  - Eagle Scout Service Project Workbook
  - Venturing Summit Award Service Project Workbook
- The most current versions can always be found on this page of the BSA National Site <https://www.scouting.org/programs/scouts-bsa/advancement-and-awards/resources/>
- Note that each of the above references contain *Procedures and Limitations for . . . Fundraising* which must be understood and followed.
  - the BSA Guide to Unit Money-Earning Projects at <http://www.scouting.org/filestore/pdf/510-274.pdf>
  - BSA Guide to Advancement Fundraising Section. 9.0.2.10

GHV will make every effort to keep this guideline current as BSA fundraising guidelines change and as practical experiences are assessed.

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 and/or Eagle Chair. 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 dos and don'ts of service project fundraising provided in the references cited herein, but rather to clarify the current GHV positions and procedures on such fundraising. Be aware that some on-line information from sites other than the national BSA website may be contradictory to GHV policy.

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, the candidate's parents or relatives, unit or its chartered organization, unit's 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 so that a complete assessment of the fundraising effort can be made.

## 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. Be sure to access the current workbook from the National BSA Website

<https://www.scouting.org/programs/scouts-bsa/advancement-and-awards/resources/>

Fundraising applications found on other websites are often outdated and will not be accepted. 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 (of funds, materials, supplies and professional services) 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.

A value for “How much money do you expect to raise?” must be included. This number should be somewhat 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 – but not borrowed) 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 [GHV.Eagles@scouting.org](mailto:GHV.Eagles@scouting.org), but only AFTER the approval of the service project proposal at the district level. It will then be routed to those responsible for review and approval. All applications should be submitted directly by the Scout and not via a third party and at least one unit leader should also be copied on the submission.

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

- **Algonquin District:** Yzette Swavy Lipton [slipton259@aol.com](mailto:slipton259@aol.com)
- **Dutchess District:** Ken Maurer [Dutchess.Eagle@scouting.org](mailto:Dutchess.Eagle@scouting.org)
- **Hudson-Delaware District:**
  - Bob Stuercke [heritage.eaglescout@gmail.com](mailto:heritage.eaglescout@gmail.com) / [bassplayer0427@gmail.com](mailto:bassplayer0427@gmail.com)
  - Jim Steinberg [jsteinberg5@hvc.rr.com](mailto:jsteinberg5@hvc.rr.com)
- **Manitoga District:** Jay Gussak [manitogaadvancementchair@gmail.com](mailto:manitogaadvancementchair@gmail.com)
- **Mohican District:** George Peborde [gpeborde@gmail.com](mailto:gpeborde@gmail.com)
- **Muscoot District:** Joe Greenfield: [yussel3@comcast.net](mailto:yussel3@comcast.net)
- **Rockland District:** Anne Martel [rockland.eagle@gmail.com](mailto: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 as presented, and the fundraising application is complete (with signatures) without the need for further modification.

The application submission, review and approval process are 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 to allow the Scout to move forward with the project without delay.

Fundraising applications will normally be reviewed within one week of receipt and a response will be sent to the Scout immediately thereafter, either indicating approval to proceed with fundraising or citing deficiencies that need to be addressed. Whenever possible, a unit leader will be copied on the reviewer's response, and that unit leader should assure that the Scout responds accordingly.

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 or donors) 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, email or in person, to local businesses, organizations, friends, acquaintances, and civic officials.

A list of all such prospective business, organization, and civic 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.

Soliciting multiple locations of the same business (e.g., Lowes, Home Depot, etc.) will not be allowed. However, soliciting multiple chapters of national fraternal organizations, e.g., Knights of Columbus, American

Legion, etc. may be allowed, as these chapters are independently managed and sometimes share contributions to Eagle projects.

### **Goods and Services Fundraisers:**

Common fundraisers are 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 quality products 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. Scouts should also be reminded to clearly represent the event as being on behalf of the project beneficiary. And BSA uniforms (Class A or B) may be worn during the event.

Fundraisers involving preparation and serving of meals are subject to local health ordinances and should be conducted under the control of a “food service licensee.” Scouts may be reminded of this point, 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 if 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.

### **Coin Drops:**

Coin Drops – requesting cash, either as a stand-alone method, e.g., in front of a local supermarket, or in conjunction with another acceptable fundraising methods, e.g., at a car wash. - are allowed if proper fundraising procedures are followed, e.g., it must be clear that fundraising is on behalf of the beneficiary, not BSA, Scout uniforms are not to be worn, and the Scout must be accompanied by at least one adult.

### **Crowdfunding or Solicitation *via* Other social media:**

The solicitation of prospective donors via social media, e.g., Facebook or fundraising websites, e.g., GoFundMe.com, is acceptable. If this method is used, however, then all concerned, including the Scout, the Scout’s parent or guardian, the unit leader and those approving fundraising at the local council, should be aware that fees may be involved and that fundraising for something like an Eagle project may or may not comply with the website’s terms of service. There can be other issues as well, such as what to do if more—or less—than what is needed is raised. It is important that someone in a position of responsibility reads and understands the website’s “fine print.”

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, GHV has not imposed such restrictions to-date.

### **Movie Nights:**

These fundraisers are subject to copyright laws. If the Scout wants to use a film which is in the public domain, such as one of the movies shown on this website.

<http://www.thefilmdetective.com/our-archive>

then that would be acceptable as it does not violate copyright law.

If the Scout can confirm that the location where the movie would be shown has the legal licensing to show the particular film, then that would be acceptable as it also would not violate copyright law.

Otherwise, Movie Nights are NOT permitted fundraisers.

### **Unacceptable Eagle Fundraising Methods:**

**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, 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 publicly acknowledge those contributors.

## Quick-Eagle Service Project Fundraising Guide

### Give to Every Scout at Proposal Approval

#### 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.

#### The Form:

- Unless fundraising involves contributions solely from the beneficiary, or from the candidate, the candidate's parents or relatives, unit or its chartered organization, unit's parents or members, 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 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 reasonably 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. Forms for \$500 or more are approved at the council level and must be addressed to [GHV.Eagles@scouting.org](mailto:GHV.Eagles@scouting.org).

#### Email Contacts:

- **Council:** [GHV.Eagles@scouting.org](mailto:GHV.Eagles@scouting.org)
- **Algonquin District:** Yzette Swavy Lipton [slipton259@aol.com](mailto:slipton259@aol.com)
- **Dutchess District:** Ken Maurer [Dutchess.Eagle@scouting.org](mailto:Dutchess.Eagle@scouting.org)
- **Hudson-Delaware District:**
  - Bob Stuercke [heritage.eaglescout@gmail.com](mailto:heritage.eaglescout@gmail.com) / [bassplayer0427@gmail.com](mailto:bassplayer0427@gmail.com)
  - Jim Steinberg [jsteinberg5@hvc.rr.com](mailto:jsteinberg5@hvc.rr.com)
- **Manitoga District:** Jay Gussak [manitogaadvancementchair@gmail.com](mailto:manitogaadvancementchair@gmail.com)
- **Mohican District:** George Peborde [gpeborde@gmail.com](mailto:gpeborde@gmail.com)
- **Muscoot District:** Joe Greenfield: [yussel3@comcast.net](mailto:yussel3@comcast.net)
- **Rockland District:** Anne Martel [rockland.eagle@gmail.com](mailto:rockland.eagle@gmail.com)