



Boy Scout Troop 809

Charter Organization: United Methodist Church, Danbury, CT 06810

November 2009

Dear Troop 809 Families,

Fundraising is a great way to help minimize some of the costs associated with Scouting. Whether the money being earned is for the troop, to buy new equipment, for individual crews, or reduce the cost of high adventure trips, any funds earned, we all agree, will be very helpful.

To help organize our troop's fundraising events/activities a new Fundraiser Procedure is now in effect. The procedure is meant to assist you in your fundraising efforts as well as informing the troop members, our troop treasurers as well as BSA and our charter organization of money earning activities within the troop.

The Fundraising Procedures, the Requirements as well as the supporting documents (Fundraising Details sheet, Allocation of Profits Agreement sheet, BSA Unit Money-Earning Application, Cash Box & Check recording sheets, Inventory sheet, Reimbursement sheet, Income & Expense Report and the Allocation of Profits Report) are to be used for all troop, or individual patrol /crew fundraisers.

Before you begin any fundraising effort please read the following Fundraising Procedures and Requirements. Any questions can be addressed to the troop treasurers' or the committee chairperson.

Sincerely,

Barbara A. Kraft

Troop 809 Committee Chairperson

**\*\* Any fundraiser that is currently "in the works" should fill out the Fundraiser Details Sheet and present to Committee.**

\*\*\* The fundraising procedures do not pertain to Eagle Scout Fundraisers, but the Scout is more than welcome to use any of the forms for his treasurer's reports in his workbook.

10/21/09

# **Troop 809 Fundraising Procedures**

The Troop 809 fundraiser procedures are implemented: a) to be compliant with IRS regulations, b) to be forthcoming with information within our Troop as well as our charter organization, and c) to follow the rules & regulations of BSA which govern our Troop. Got a fundraising idea? Great, let's hear it!

## **Step 1**

At least three to six weeks prior to the start of the fundraiser **determine** the following:

- \* when it will take place (potential dates involved),
- \* where it (potentially) can/will be held,
- \* any upfront costs involved and who paying for,
- \* who is running it (behind the scenes and the date of),
- \* who is to benefit
- \* how any profits are to be divided

## **Step 2**

Fill out a **Fundraiser Details Sheet** completely before Step 4.

Read the **Troop 809 Fundraising Requirements** – sign # 9 on Fundraiser Details Sheet.

## **Step 3**

Contact the Troop Committee Chairperson and ask to be added to the agenda at the next committee meeting to present the idea. Committee meetings are the 3<sup>rd</sup> Wednesday of every month except July.

## **Step 4**

Present your idea at the committee meeting; please **bring 3 copies of the Fundraiser Details Sheet & Allocation of Profits Agreement (if needed) with you**. (One for the Troop Treasurer, one for the minutes and one for you to keep.) The committee members present will vote on the fundraiser idea after your presentation. A simple majority of votes is needed to proceed. The committee will decide to accept the fundraiser to run through the Troop or forward the request to Friends of Troop 809, for their officers to consider the fundraising request.

**Please note:** *If a fundraiser idea or event is declined by both Troop 809 and Friends of Troop 809, and you pursue the fundraiser on your own, you cannot use Troop 809 or Friends of Troop 809 in your advertising or presentation of the fundraiser. If you do it will be false advertisement and not covered under any BSA Insurance.*

## **Troop 809 Fundraising Requirements**

The chairperson for the fundraiser stated in the Fundraiser Details Sheet, agrees to the following:

- **Submit to committee and gain approval at least 3 to 6 weeks prior to the start of the fundraiser or event.**
- Submit for approval a **BSA Unit Money-Earning Application** to council in order for participating troop members to be covered by BSA insurance, **two weeks prior to start of fundraiser.**
- Maintain a **Fundraiser Inventory Sheet**, if needed, to keep track of supplies purchased and returned. Unused items will be returned and not saved for another fundraiser. Completed Fundraiser Inventory Sheet will be submitted into the Treasurer within one week of fundraiser.
- Use the **Fundraiser Cash Box & Checks Reconciliation (FCBCR)** forms included and submit with proceeds.
  - No one will retain cash from a fundraiser, for any reason.
  - No one should be compensated anyone for volunteering their time or services, on a fundraiser. If they are compensated, it will be listed as an expense and the Treasurer will make arrangements with our charter organization to have a 1099 issued and the amount reported on the recipient's income taxes.
  - Have 2 unrelated people count the cash collected on the day of the event and sign off on FCBCR).
  - To ensure proper record keeping, all cash & checks collected will be turned in to the Treasurer, along with the FCBCR within 24 hours after fundraiser.
- Retain all receipts for expenses/reimbursement and attach them to the **Fundraiser Expense/Reimbursement Form (FERF)**. Payment for expenses will be in the form of a check or you can opt to have the funds deposited into your Scout's account. **If receipts are not submitted with the FERF form, I understand reimbursements will not be made until the receipts are submitted.**
  - \*\* The FERF will be submitted to the Treasurer within one week of fundraiser.
  - \*\* Tips: if a tip is given/needed, write on a piece of paper the following: (1) who given to, (2) why given, (3) amount, (4) date given and (5) who is to be reimbursed. Please have another person verify/witness the payment of the tip and both you and the verifier sign the paper, and include with your expenses.
- Submit a completed **Fundraiser Income and Expense Report** to the Treasurer within one week of the completion of the fundraiser.
- Fill out the **Fundraiser - Allocation of Funds Report** and submit to the Treasurer within one week of fundraiser.

## **Troop 809 - Fundraiser Details Sheet**

1) Idea/Event: \_\_\_\_\_  
\_\_\_\_\_.

2) Potential Dates & Times: \_\_\_\_\_  
\_\_\_\_\_.

3) Where Being Held: \_\_\_\_\_.

4) Estimated of "Up Front" Cost Involved:  
\_\_\_\_\_.

Who is to be reimbursed: \_\_\_\_\_.

5) Chairperson(s) of the fundraiser: \_\_\_\_\_.

6) Contact person on the date of the fundraiser:  
\_\_\_\_\_.

7) Who is to benefit: \_\_\_\_\_.

8) How are the profits to be divided

divided equally by participants or Scouts ,no signatures are required.

per hour of participation

amount of sales per participant

other: describe  
\_\_\_\_\_  
\_\_\_\_\_.

\*\*If profits are to be divided up by hours worked or amount of sales per individual, then a **Fundraiser Allocation of Profits Agreement** needs to be submitted along with this Fundraiser Details Sheet.

9) I have received a copy of, have read and agree to the follow Troop 809 Fundraising Procedures and Rules & Regulations: Signed By Chairperson of the Fundraiser:  
\_\_\_\_\_.

**Please note:** If a fundraiser idea or event is declined by both Troop 809 and Friends of Troop 809, and you pursue the fundraiser on your own, you cannot use Troop 809 or Friends of Troop 809 in your advertising or presentation of the fundraiser. If you do it will be false advertisement and not covered under any BSA insurance.

Action by:  Troop Committee  FOT 809 Board

Approval or Refusal Given On: \_\_\_\_\_

With a vote of (yes)\_\_\_\_\_ to (no) \_\_\_\_\_ to (abstain); number of voting members present

## **Fundraiser Allocation of Profits Agreement**

*\*\* submit with fundraiser detail sheet, if necessary.*

**Fundraiser:** \_\_\_\_\_

**Chairperson:** \_\_\_\_\_ **Date:** \_\_\_\_\_

The participants of the fundraiser stated above agree to have the profits from this fundraiser divided as follows (check one/explain if needed):

Total amount earned, divided equally by number of participants, no matter how much effort is put into the fundraiser by any one participant – **do not need signatures.**

Per hour of participation, explain how: \_\_\_\_\_

\_\_\_\_\_

Based on the amount of sales, explain how: \_\_\_\_\_

\_\_\_\_\_

Other, explain: \_\_\_\_\_

\_\_\_\_\_

Signed by all the participating parents of the Scouts of the fundraiser:

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Use other side of page if needed.....

**Fundraiser Inventory Sheet – Troop 809**

Use if necessary for your fundraiser - contact Troop Treasurer to see if required

**Name of Fundraiser:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Prepared By:** \_\_\_\_\_ **Phone #** \_\_\_\_\_

<b>ITEM</b>	<b>Quantity Purchased</b>	<b>Cost</b>	<b>Quantity Returned</b>	<b>Refund Amount</b>	<b>Total Qty Used</b>	<b>Net Expense</b>

Attach this form and receipts to the Fundraiser Reimbursement Form.

**Fundraiser Cash Box/ Checks Reconciliation – Troop 809**

Name of Fundraiser: \_\_\_\_\_ Date: \_\_\_\_\_

Prepared By: \_\_\_\_\_ Phone # \_\_\_\_\_

**CASH BOX**

<i>Starting Cash</i>	<i>Denomination</i>	<i>Ending Cash</i>
\$ _____	100's	\$ _____
\$ _____	50's	\$ _____
\$ _____	20's	\$ _____
\$ _____	10's	\$ _____
\$ _____	5's	\$ _____
\$ _____	1's	\$ _____
\$ _____	Q	\$ _____
\$ _____	D	\$ _____
\$ _____	N	\$ _____
\$ _____	P	\$ _____
\$ _____	TOTAL	\$ _____

\*Please have 2 (un-related) adults verify starting and ending cash and sign below:

Starting Cash	Ending Cash
Verified	Verified
By: _____	By: _____
Verified	Verified
By: _____	By: _____

**\*Please roll/ baggie loose coins, as follows: Q = \$10.00 , D = \$5.00 , N = \$2.00 and P = \$.50 .**

**\*\*Submit this form and the cash to the Treasurer within 24 hours of fundraiser.**

**Fundraiser Cash Box/ Checks Reconciliation – Troop 809**

**Checks Received**

Name of Fundraiser: \_\_\_\_\_ Date: \_\_\_\_\_

Prepared By: \_\_\_\_\_ Phone # \_\_\_\_\_

<i>Name on Check</i>	<i>Ck #</i>	<i>Amount</i>	<i>Name on Check</i>	<i>Ck #</i>	<i>Amount</i>
<b>Subtotal</b>	=		<b>Grand Total</b>	=	

Submit this form and the checks to the treasurer within 24 hours of fundraiser.



**Fundraiser Expense/Reimbursement Form – Troop 809**

**Name of Fundraiser:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Prepared By:** \_\_\_\_\_ **Phone #** \_\_\_\_\_

Treasurer please reimburse, (by check or to the Scout account), the following person(s) for expenses incurred with the above named fundraiser. **If applicable, I have attached a Fundraising Inventory Sheet. All receipts of expenses are attached to either this form and or the Fundraising Inventory Sheet.**

Person to be reimbursed:	Amount :	Description:	Receipts Attached:	Scout A/C	Issue CK

## Fundraiser Income & Expense Recap – Troop 809

Submit form to Treasurer within one week of fundraiser.

*Name of Fundraiser:* \_\_\_\_\_ *Date:* \_\_\_\_\_

*Prepared By:* \_\_\_\_\_ *Phone #* \_\_\_\_\_

### *INCOME (Cash & Checks Received):*

Deposits From:	Amount:
1)	\$
2)	\$
3)	\$
4)	\$
<b>Total Income* =</b>	<b>\$</b>

\*This amount is to be given to the Treasurer.

### *EXPENSES:*

Reimbursement For:	Amount:
1)	\$
2)	\$
3)	\$
4)	\$
5)	\$
6)	\$
<b>Total Expenses =</b>	<b>\$</b>

*Total Income(cash & checks)	\$
- Total Expenses	\$
<b>Net Profit for Fundraiser =</b>	<b>\$</b>

**Fundraiser Allocation of Funds Report – Troop 809**

Submit form to Treasurer within one week of fundraiser.

**Name of Fundraiser:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Prepared By:** \_\_\_\_\_ **Phone #** \_\_\_\_\_

As per the Fundraiser Allocation of Funds Agreement, for the above named fundraiser, the following scouts are to be credited with the following amounts into their Scout Accounts:

<b>Scout Account:</b>	<b>Amount:</b>
1)	\$
2)	\$
3)	\$
4)	\$
5)	\$
6)	\$
7)	\$
8)	\$
9)	\$
10)	\$
11)	\$
12)	\$
13)	\$
14)	\$
15)	\$
16)	\$
This <b>total</b> must equal the net profit from the income and expense recap report.	\$

# UNIT MONEY-EARNING APPLICATION

Please submit this application to your council service center at least two weeks in advance of the proposed date of your money-earning project. Read the 10 guides on the other side of this form. They will help you in answering the questions below.

(Local council stamp)

Pack  
 Troop      No. \_\_\_\_\_ Chartered Organization \_\_\_\_\_  
 Team  
 Crew

Community \_\_\_\_\_ District \_\_\_\_\_

Submits the following plans for its money-earning project and requests permission to carry them out.

What is your unit's money-earning plan? \_\_\_\_\_  
\_\_\_\_\_

About how much does your unit expect to earn from this project? \_\_\_\_\_ How will this money be used? \_\_\_\_\_  
\_\_\_\_\_

Does your chartered organization give full approval for this plan? \_\_\_\_\_

What are the proposed dates? \_\_\_\_\_

Are tickets or a product to be sold? Please specify. \_\_\_\_\_  
\_\_\_\_\_

Will your members be in uniform while carrying out this project? (See items 4 and 5 on other side.) \_\_\_\_\_  
\_\_\_\_\_

Have you checked with neighboring units to avoid any overlapping of territory while working? \_\_\_\_\_

Is your product or service in direct conflict with that offered by local merchants? \_\_\_\_\_

Are any contracts to be signed? \_\_\_\_\_ If so, by whom? \_\_\_\_\_

Give details. \_\_\_\_\_

Is your unit on the budget plan? \_\_\_\_\_ How much are the dues? \_\_\_\_\_

How much does your unit have in its treasury? \_\_\_\_\_

Signed \_\_\_\_\_  
(Chartered Organization Representative)

Signed \_\_\_\_\_  
(Unit Leader)

Signed \_\_\_\_\_  
(Chairman, Unit Committee)

\_\_\_\_\_  
(Address of Chairman)

**FOR USE OF DISTRICT OR COUNCIL FINANCE COMMITTEE:** Telephone \_\_\_\_\_

Approved by \_\_\_\_\_ Date \_\_\_\_\_

Approved subject to the following conditions \_\_\_\_\_  
\_\_\_\_\_

# 10 GUIDES TO UNIT MONEY-EARNING PROJECTS

The way in which a unit earns money to carry out its program is of great importance in the education of youth members in basic values.

Whenever your unit is planning a money-earning project, this checklist can serve as your guide. It will be helpful to you as you fill out the application. If your answer is yes to all the questions that follow, it is likely the project conforms with Scouting's standards and will be approved.

1. Have your unit committee and chartered organization approved your project, including the dates and the methods?

There should be a real need for raising money based on your unit's program. We should not engage in special money-earning projects merely because someone has offered us an attractive plan. It's important to remember that individual youth members are also expected to earn their own way. The need should be over and above normal budget items covered by dues.

2. Do your plan and corresponding dates avoid competition with money-raising efforts and policies of other units, your chartered organization, your local council, and United Way?

Check with your chartered organization representative to make certain that your chartered organization agrees on the dates and type of fund-raiser. The chartered organization representative can also clear the other dates by calling the council service center.

3. Does your plan comply with local ordinances; is it free from any association with gambling; and is it consistent with the ideals and purposes of the Boy Scouts of America?

Money-raising projects that include the sale of raffle tickets are in violation of this policy.

This question can be answered only in terms of specific proposals. If there is **any question** of its suitability, contact your local council service center for assistance.

4. If a commercial product is to be sold, will it be sold on its own merits and without reference to the needs of Scouting, either directly (during sales presentations) or indirectly?

Teaching youth members to become self-reliant and to earn their own way is an important part of training our youth members.

The official uniform is intended to be worn primarily for use in connection with Scouting activities. However, the uniform may be worn in connection with council-sponsored product sales programs.

5. If tickets are sold for any function other than a Scouting event, will they be sold by your youth members as individuals without depending on the goodwill of Scouting to make this sale possible?

Tickets may be sold by youth members in uniform in the name of Scouting for such things as pack shows,

troop suppers, circuses, expositions, and similar Scouting events.

6. Even when sales are confined to parents and friends, will they get their money's worth from any product they purchase, function they attend, or services they receive from your unit?

Here again is the principle of value received—a sale standing on its own merit—so that the recipients are not in any way subsidizing either Scouting or the member. Youth members must learn to pay their own way and to honestly earn the money to do it. You cannot permit anyone to use the good name of Scouting to sell a product.

7. If a project is planned for a particular area, do you respect the right of other Scouting units in the same neighborhood?

It's a courtesy to check with neighboring units or the local council service center to coordinate the time of your project and to see that you aren't covering their territory. Your unit commissioner can help you with this.

8. Is it reasonably certain that people who need work or business will not lose it as a result of your unit's plan?

Your unit should neither sell nor offer services that will damage someone's livelihood. If possible, check with the people who may be affected.

9. Will your plan protect the name and goodwill of the Boy Scouts of America and prevent it from being capitalized on by promoters of shows, benefits, or sales campaigns?

Because of Scouting's good reputation, customers rarely question the quality or price of a product. Unchecked, the network of Scouting units could become a beehive of commercial interest to the neglect of character building and citizenship training.

10. If any contracts are to be signed by your unit, will they be signed by an individual without reference to the Boy Scouts of America, and in no way appear to bind the local council, the Boy Scouts of America, or the chartered organization to any agreement of financial responsibility?

Before any person in your unit signs a contract, he must make sure the venture is legitimate and worthy. If a contract is signed, he is personally responsible. He cannot sign on behalf of the local council or the Boy Scouts of America, nor may he bind the chartered organization without its written authorization. If you're not sure, check with your local council service center for help.