

Town of North Yarmouth
Charitable Fundraising Policy

I. PURPOSE

The purpose of the Charitable Fundraising Policy is to define and provided guidelines in the collection of money through voluntary contributions, sales, and or events/programs for the purposes of charitable donation and or support.

The Town understands that board and committee members, and citizens may wish to seek external funds to support key initiatives and projects. It is important that all fundraising activities are submitted to the Town Manager for approval prior to solicitation.

II. GENERAL GUIDELINES

- A. Fundraising may be conducted for the purpose of charitable giving or charitable donations.
- B. All fundraising activity must be reported and authorized through the Town Manager and or Select Board prior to starting.
- C. The Select Board may periodically review fundraising projects which are funded through bond monies for consistency, funding goals, and potential project additions. The Select Board may add specific conditions or guidelines to any fundraising efforts as necessary.
- D. Fundraising shall benefit the community of North Yarmouth.
- E. Any fundraising using an online platform must be reviewed and approved by the Select Board.
- F. Use of online payment methods shall be reviewed and approved by the Town Manager.
- G. Monies raised for the purpose of charitable giving cannot be held for an extended time period by an individual or board/committee representative and must be turned in to the Town within ten (10) business days of receipt.
- H. Any fundraising activity that creates merchandise or marketing material that includes the Town brand, seal or name, must ensure the usage is in accordance with the Town's guidelines. All materials for use in marketing must receive approval from the Town Manager.
- I. The Town authorizes the use of funds raised for funding to purchase promotional merchandise (e.g., engravings, t-shirts, pens, etc.), host promotional events, mailings or other types of merchandise provided these materials are for fundraising efforts. Fundraising dollars used for this purpose shall be reimbursed to the fundraising account.
- J. All monies raised for accounting purposes shall be recorded into the specific committee/project monetary account.
- K. Fundraising activities may be restricted by the Town Manager to reasonable times, places, and manners.

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- L. The Town Manager may prohibit and rescind any and all fundraising activity and privileges when deemed appropriate.
- M. Fundraising relating to any candidate for political office or political campaign is prohibited.
- N. All fundraising revenues received shall go only to specific costs outlined in the project, program or purpose for raising funds.
- O. All donations with or without conditions must be accepted by a vote of the Select Board at a regular meeting.
- P. Donations with conditions attached must be submitted to the voters for acceptance or rejection. (30-A M.R.S. § 5654)
- Q. Addendums to this policy may be applied for purposes of providing project specific guidelines to a committee and or representative(s), or town management.

III. NAMING PROVISIONS

General:

- A. All naming recognition must be consistent with North Yarmouth's mission. In this regard, due attention shall be given to both long-term and short-term appropriateness of naming. The Town of North Yarmouth shall not name an outdoor area, interior feature, object or space in a manner that discriminates, slanders or demeans based upon race, religion, sex, age, national origin, color, handicap creed, sexual orientation or socioeconomic status. Existing and previously named property and spaces will be grandfathered under this policy.
- B. This policy is designed to provide guidance in facilitating the naming process. It is not intended to stifle philanthropic creativity.
- C. Naming recommendations may be presented to the Select Board by a committee or charged representative(s) assigned to the task.

Individual/Family Naming:

- A. An outdoor area, interior feature, object or space may be named for a person or family associated with North Yarmouth who has rendered distinguished service to North Yarmouth or who has made a substantial contribution to society. The above may also be named in recognition of a benefactor whose gift represents a substantial contribution toward total project cost, based on the following criteria:
 - 1. In lieu of naming an area for the benefactor, the donor may propose another person or entity be honored in this manner, subject to approval.

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2. The individual has a relationship with North Yarmouth and/or the region, and he or she has/had a positive image and demonstrated integrity reflecting the values of North Yarmouth.
3. In the event of changed circumstances, the Select Board reserves the right, on reasonable grounds, to revise the form of, or withdraw recognition.
4. The guideline for determining a gift amount that represents a substantial contribution to a project shall be established by addendum by committee and or representatives charged with the task with final approval of the Select Board.
5. Donations for naming should be realized in full on or before the completion of the project.
6. Rooms named for an individual or family generally will be termed "**XXX Room.**" If a functional title is selected, the building may be named "**XXX Art Room**" for example. When the proposed naming of a building or feature would not include the benefactor's name (by request of the benefactor), it is recommended that a person or family name be added to the signage, or that the attribution be anonymous.
7. A named interior feature, object or space will not be exhibited on external building walls; the name will be located as close as possible to (and otherwise affiliated with) the funded feature, object or space.
8. The name will remain on the near the outdoor area, interior feature, object or space for the life of the structure. If at some future time the structure is replaced (which may include a major reconstruction that substantially changes the functions / appearance of a building, area or features interior and exterior), the name may or may not be carried on the replacement facility as approved by the Select Board.
 - a. As modifications are made to property over time, situations will occur where it is best to relocate or modify the property. In the event modifications are required or recommended, the benefactor will be involved in early planning. Proposals to rename facilities or areas or add a second name shall adhere to the criteria outlined above. In addition, these principles shall be followed:
 - 1) Any proposal to rename a facility or area or to add a second name in recognition of a gift shall be reviewed by the Select Board. This review shall include any gift documents pertaining to the original gift and related naming, as well as the gift documents pertaining to the subsequent gift proposed.
 - 2) When an area or facility named in recognition of a gift or in honor of an individual is developed for another use, the area or facility may be named in recognition of new gifts.
 - 3) Appropriate recognition of earlier donors and honorees shall be included in or adjacent to new and renovated facilities, or in redeveloped areas. When a facility or area is proposed for renaming, the Select Board will make all

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reasonable efforts to inform, in advance, the original donors or honorees and their immediate family members.

Corporations or Organizations:

- A. Corporations or organizations are encouraged to be major benefactors of by recognizing a person or family important to their success. Only in rare situations will an area be named for a corporation or organization whose gift represents a major contribution toward total project cost.
 - 1. In rare situations will an outdoor area, interior feature, object or space be named for a corporation or organization whose gifts represent a substantial contribution toward the project cost, based upon the criteria outlined in the Individual/Family Naming in Section III of this policy.
 - 2. The corporation or organization should have a relationship with North Yarmouth and/or the region, a positive image and demonstrated integrity. In the event of changed circumstances, North Yarmouth reserves the right, on reasonable grounds, to revise the form of, or withdraw recognition.

Requests:

- A. A formal memorandum of a request for naming should be submitted to the project representative(s) who shall review the request and present it to the Select Board for review. The memorandum shall include:
 - 1. The individual donor's name or corporation/corporate foundation and information regarding the gift being recognized.
 - 2. A brief profile of the donor or corporation, his or her connection to North Yarmouth and an overview of significant past giving.
 - 3. Any special considerations offered to the donor or corporation, including the structure of the gift.
 - 4. A description of the recognition, including proposed inscription, mounting and size information, as applicable.

Signage Guidelines:

- A. All interior and exterior recognition signage and lettering may be developed by the committee and or representative(s) charged with the task in consultation with the Town Manager and Select Board. The goal is to design recognition plaques or signage that appropriately adhere to the graphic guidelines of North Yarmouth and are complementary to the existing interior and exterior recognition signage and fit appropriately with design elements of the representative space. Implementation of signage shall not be undertaken until final approval from Select Board.

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Approval Process:

- A. No commitment for naming shall be made prior to approval of the proposed name.
- B. Proposals for naming opportunities will follow the approval process described below before publicly discussing recognition of a person, family, corporation or organization and before formally accepting a prospective donor for a naming gift.
- C. Discussions with the individual, corporate, or other organizational donors who seek naming rights must be conducted with the understanding that the Select Board reserves the right on both the minimum amount of a naming gift and the name of the person or organization to be honored by the naming for final approval compliance.
- D. In all bond financed projects bond counsel shall review gifts and naming issues for compliance with municipal bond tax laws prior to submission to the legislative body.
- E. The Select Board shall submit all gifts of condition to the Town's legislative body at a Town Meeting in accordance with Conditional Gifts 30-A M.R.S. § 5654.

Select Board

Jennifer Speirs, Chair

Stephen Morrison, Vice Chair

Anne Graham

William Whitten

James Moulton

Adopted: November 7, 2018
Amended: February 19, 2019