

# Margaret Manson Elementary School

## Fundraising Policy

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## 1. OVERVIEW

The purpose of the document is to provide fundraising guidelines to Governing Board members of Margaret Manson Elementary School (MMES) in order to make decisions in the best interest of the school community. The fundraising guidelines are at the discretion of the Governing Board.

This document also serves as a guideline to the Administration & Staff, Parent Graduation Committee, Home and School (H&S) members, or students seeking approval for fundraisers. It is critical that all fundraising activities follow the same process.

N.B. The MMES Governing Board has approved this document along with the attached “Fundraising Approval Request Form” and “Fundraising Summary”. The three documents form an integral part of the MMES Governing Board Rules of Internal Management.

## 2. FUNDRAISING- A DEFINITION

Fundraising, the organized activity of raising funds, comes from a variety of sources and is used in different ways to improve school life. The purpose of fundraising is to enhance the school’s educational programs and support initiatives that are part of the school’s Strategic Plan. These funds are usually gathered through fundraising and donations.

School-based fundraising activities currently fall into three categories:

- General fundraising for the benefit of the school
- Fundraising for a charitable organization
- Fundraising with the specific intent of reducing each participant's costs (as in trips or graduation activities)

## 3. FUNDRAISING- WHO DOES IT?

Fundraising may be carried out by one or more groups. At MMES, historically, fundraising has been conducted by Administration and Staff, Parent Graduation Committee, H&S or Students who have:

- Included fundraising efforts (i.e. lunches, fairs, bake sales) to help the MMES community to support the school initiatives (i.e.: anti-bullying sessions), teachers’ wish lists, organize social community events (i.e.: holiday fairs, BBQs), Graduation activities, etc.
- Concentrated their fundraising efforts to help external groups, charitable and non-profit organizations (i.e. Terry Fox, Heart & Stroke, etc).

Most activities are annual or recurring events, the proceeds of which are destined for, and benefit, all grades in the school.

#### 4. FUNDRAISING CRITERIA

The following criteria must be used for the approval of all fundraising activities at MMES.

- Conformity with the Education Act and the Consumer Protection Act.
- Governing Board approval is obtained prior to the start of the fundraising campaign.
- Follow the prescribed process detailed in section 9.
- Must be in conformity with the Vision, Mission Statement and School Success Plan of MMES.
- Relates to the MMES community at large by supporting school activities, local and global citizenship, or by supporting and encouraging leadership and compassion programs in our community.
- The fundraising activities and the corporate ethics of the institution(s) involved must be appropriate in nature for association with this school.
- Sale of advertising space is of the best interest of MMES and must uphold the image of the school.
- The product(s) and the advertising associated with the product(s) must be appropriate in nature for students to promote.
- Use products and services of good quality, suitable for student consumption and should be provided by reputable companies.
- In the case of selling of food products, during school hours and on school premises, the edible product must comply with the regulations and restrictions set forth in the LBPSB Food & Nutrition Policy (which may be found on the LBPSB website).
- In the case of bake sales, the edible product should comply with MMES allergy guidelines.
- The focus of a fundraising activity must be clearly stated to the Governing Board in the request for approval. Once approved, the focus of a fundraising activity, or activity benefactor, must be made clear to all concerned during the fundraising campaign.
- Be fiscally transparent. The fundraising activity coordinator must follow appropriate accounting practices of recording revenues and expenditures.
- An effort should be made to support all grades (Kindergarten, Cycle 1, Cycle 2 and Cycle 3 ).

Fundraising activities undertaken on behalf of the school must NOT:

- Place unnecessary or excessive burden on the school community, parents or staff
- Interfere with the delivery of a school program
- Put the students in danger
- Exploit students
- Require direct endorsement of products or services
- Require door-to-door canvassing or bagging at commercial outlets
- Require students to listen to or read commercial advertising

## 5. FUNDRAISING FOR CAPITAL PROJECTS AND RELATED ITEMS

Fundraising for capital projects or capital-related items is permitted. Initiatives must be conducted in consultation with the school principal prior to presentation to Governing Board. For consideration:

- Information and Technology (both hardware and software) - equipment purchased must comply with the School Board's current technical standard for information technology
- Playground equipment – the process must comply with the School Board's policies (Purchasing Policy, Authorized Vendors) and government safety standards

## 6. DONATIONS IN KIND

Through parent and community contacts, MMES may accept donations under the following conditions:

- That they support the Fundraising Criteria above
- Donations must be reviewed with the school principal prior to presentation to Governing Board.
- That donors be advised of the purpose and intended use of the donated funds or goods
- That advertising in return for donations will be at the discretion of the principal

*Examples of appropriate donations include:*

- Tickets to events (cultural and sports) ; Food and beverages when good quality, suitable for student consumption and follow school board policies (Food and Nutrition); Services at events (DJ, audio visual, etc.) provided persons have been approved by the school board and have judicial clearance; Computers, books or musical instruments (upon approval of School Principal)

## 7. FUNDRAISING GUIDELINES FOR ALL

- Governing Board will attempt to limit fundraising activity per month in order to limit financial requests presented to parents (excluding lunches/TCBY sales).
- Presentation of a preliminary plan of fundraising activities may be presented at the end of the school year (May / June). Presentation of revised plan of fundraising activities must be submitted within the first 2 months of the next school year.
- A list of fundraising proposals should be submitted to the Governing Board no later than the third GB meeting of the school year (typically during the month of November).
- Additional fundraising activities that come up after the aforementioned list has been submitted may still be brought to the Governing Board for individual approval.
- Fundraising campaigns which offer incentives should not be considered. It is preferable to teach students to participate for the sake of giving, rather than to earn something in return for charitable activities.
- Whenever possible; local (i.e. Kirkland) suppliers should be used to purchase supplies for fundraising activities (ex. Pizza days, BBQs, etc.)

## 8. MANAGING FUNDS

In order to ascertain the success of an activity and to manage budgets properly, it is proposed that:

- The principal should have access and visibility to the budgets and account standings of the groups below.
- Teaching Staff fundraising funds be managed by the school (e.g. Terry Fox Run) using the school's bank account
- H&S fundraising funds will be managed by the H&S using the H&S bank account.
  - A detailed budget for the year must be presented and approved by Governing Board.
- Graduating Committee fundraising funds be managed by the Graduating Committee using the Graduating Committee bank account.
  - A detailed budget for the year must be presented and approved by Governing Board.
  - Governing board will approve a float amount which can be carried over from year to year.
  - The graduation committee is responsible for ensuring that fundraising not exceed the approved budget and that the standard float amount be included in the budget.
  - All fundraising must specify that it for the purpose of the grade 6 graduation activities. Once sufficient funds have been raised to meet the approved budget, fundraising should stop.
- The parent community will be informed of the funds raised by the teaching staff, H&S and Parent Graduation Committee -driven activities via the school website or other means of communication (i.e.: social media)

## 9. FUNDRAISING APPROVAL / DOCUMENTATION PROCESS

All of the steps below must be completed:

1. Approval must be obtained from the Principal before coming to Governing Board.
  - 1.1. The proposal must be submitted to the Principal 10 days prior to the Governing Board meeting.
2. Information regarding the nature, the exact dates and the purpose of the fundraiser must be provided, on the Fundraising Request form, to the Governing Board Chair one week prior to the Governing Board meeting at which approval is being sought.
3. Motion for approval to be presented during Governing Board meetings. Groups seeking to hold events and conduct fundraising should plan ahead. Proposals not submitted according to the timeline noted above will not be considered until the following meeting.
4. The Governing Board must ensure that criteria are met and the guidelines are respected.
5. Dates of fundraising activities cannot be changed unless the Governing Board revisit and approve the dates. The Governing Board Chair and Principal must be consulted in advance of the start of the event. A second round of approvals may be required.
6. Upon approval of the fundraising plan, the information will be via the school website or other means of school communication (i.e.: social media)
7. The activity coordinator must submit and present the Fundraising Event Summary (in person) to the governing board within one month following the fundraising activity. Failure to present will affect future approvals of fundraising requests.

**Student led fundraising process**

1. Student must present their idea to their homeroom teacher.
2. A Fundraising Request Form must be filled out with the help of the teacher/staff.
3. Ideas must be submitted in writing to Governing Board by the Principal or Teacher/Staff
4. The activity coordinator must submit and present the Fundraising Event Summary (in person) to the governing board within one month following the fundraising activity. Failure to present will affect future approvals of fundraising requests.

**10. CONCLUSION**

This document serves as a guideline to fundraising and attempts to cover all fundraising aspects. Should a particular subject of interest not be covered in this particular document, the reader is encouraged to contact to the School Principal or the Governing Board Chair.

### 11. FUNDRAISING APPROVAL REQUEST FORM

Activity name: TBD

1. Date of event: TBD

2. Type of request (see list below):

\_\_\_\_\_ General fundraising / donations in-kind for the benefit of the school (including capital projects)

\_\_\_\_\_ Fundraising for a non - profit charitable organization

\_\_\_\_\_ Fundraising with the specific intent of reducing each participant's costs (as in trips)

\_\_\_\_\_ Graduation-related activities

3. Include a description of the initiative; explain the beneficiary and/or objective:

TBD

4. What is the target profit?

TBD – estimate is appropriate. Can be based on similar events in past years.

5. Have you presented this initiative to the principal yet? (Yes/No)

6. Who is the organizer of this initiative? (i.e.: group or name of person):

TBD

7. When will the initiative start or be held? (i.e.: start of the collection or day of event, TBD if not sure yet)

TBD

8. When will it end? (i.e.: if the initiative is longer than 1 day, TBD if not sure yet)

TBD

9. Where will it take place? (i.e.: in school yard, entrance, off-site, TBD if not sure yet)

TBD

10. Will it take place during school hours? (Yes/No)

11. Who will participate in the initiative? (i.e.: all students, some grades, parents etc)

TBD

12. What are the fees to participate in this initiative? (i.e.: open donation of \$/goods, fixed fee ticket purchase)

TBD

13. How will the fees or goods be collected? (i.e.: sold at the door, money collected by teachers)

TBD

14. Will there be external participants? (i.e.: other people coming for an event, suppliers) TBD

15. Are licenses required? (Yes/No)

16. By submitting this request, I acknowledge I have read the MMES Fundraising Policy and agree to its terms.

(Yes/No)



**12. FUNDRAISING SUMMARY**

Fundraising Summary			
<b>Activity Name</b> _____			
<b>Organizer</b>			
<input type="checkbox"/> Fundraising Lead	_____		
<input type="checkbox"/> Treasurer	_____		
<b>General Information</b>			
Start Date	End Date		
_____	_____		
Gross Funds Raised	_____		
Disbursement Details (costs)	_____		
Net Funds Raised	_____		
Current Status of Funds Raised	(i.e. monies in account or objective purchased) _____		
<b>Signatures</b>			
Fundraising Lead	Date	Treasurer	Date
_____	_____	_____	_____
Governing Board	Date	Principal	Date
_____	_____	_____	_____