

<b>NUMBER:</b>	<i>to be determined</i>
<b>TOPIC:</b>	<b>Fundraising in Schools</b>
<b>EFFECTIVE:</b>	<b>September 2010</b>
<b>CROSS-REFERENCE:</b>	
<b>REVISION DATE:</b>	<b>September 2011</b>
<b>RESPONSIBILITY:</b>	<b>Superintendent of Business Services and Treasurer</b>

**INTENDED PURPOSE:**

The Halton District School Board

- believes in effectively funding all schools
- values parental involvement in the nature and goals of school activities and, as such, recognizes that school communities may wish to raise funds to enhance learning and support school-specific initiatives
- requires that the goals of all fundraising endeavours be communicated to all involved parties prior to the onset of any fundraising initiative
- recognizes that some school fundraising projects go beyond simply raising money to reflect the collaborative efforts of teachers, parents and the school community to
  - support charitable endeavours which help students learn about the value of supporting their broader global community (e.g. Terry Fox, United Way, World Vision)
  - provide direct service to the school's pupils (e.g. through sales of food or athletic wear)
  - encourage and celebrate parent and community involvement in our schools (e.g. movie nights, community barbeques)
- requires that all fundraising procedures demonstrate the values endorsed by the Board and recognize the Board's responsibility for the safety of its pupils

Fundraising may be defined as the direct solicitation of funds or goods, including but not limited to those collected on behalf of a third party charity; through sponsorship activities; athletics; the sale of food and other products through direct orders, vending machines or canvassing; the sale of tickets for raffles or events.

The Halton District School Board Fundraising administrative procedure is intended to:

- provide appropriate guidance, authority and protection to school staff and fundraising volunteers by providing specific procedures for planning and receiving approval for fundraising at schools
- meet the public's expectations and validate the public's trust regarding the stewardship of fundraised money

## **PROCEDURES:**

The Superintendent of Business Services is authorized to issue specific mandatory processes and forms for use by schools to ensure compliance with this administrative procedure.

The Halton District School Board expects each school Principal to:

1. submit for information to the appropriate Family of Schools Superintendent, by November 15th of each school year, a Fundraising Plan which
  - a. demonstrates awareness of and respect for the financial and educational priorities held and articulated by the school community
  - b. considers the educational and social value of the proposed fundraiser and ensures that the activity is planned, organized and communicated
  - c. includes all fundraising initiatives, whether run by the School, School Council, or Home & School Association, outlining the timing, type and reason for the event (i.e. goal for money raised), and planned communication
  - d. includes input from school staff, and the School Council or Home & School Association
  - e. does not allow elementary school pupil door-to-door canvassing. Encourages but does not obligate parents and/or students to be involved in the planning and organization of fund-raising activities
  - f. reflects a consideration of year-over-year fundraising successes and goals and surplus plan (if applicable).

Fundraising events may take place during September and October while the plan is being prepared. Principals have the discretion to add additional fundraisers to the plan after it has been submitted subject to the procedures above. Amendments to the plan shall be submitted for information to the Family of Schools Superintendent within one month of the amendment to the plan.

2. inform the parents of the school/community of the major fund-raising activities approved and the purpose of the fundraising events, through the school newsletter, school website, home notification system or other electronic method.
3. ensure in-house fundraising activities are appropriate for the age, physical and mental abilities of the students involved, and are properly supervised.
4. ensure goods and services are purchased in accordance with the Halton District School Board's Purchasing Administrative Procedure.
5. assume responsibility for funds raised by the school within School Generated or School Council Funds including the custody, expenditure and accountability of those funds in accordance with the Board's School Generated & School Council Funds Administrative Procedure, using the forms and processes in the Business Services Manual.
6. ensure funds raised for a specific purpose are used for the stated purpose.
  - a. Student engagement/activity fees charged in accordance with the Student Fees Administrative Procedure should be used for the intended purpose, with both the deposit and expense transactions recorded in the appropriate category.

- b. If a category is of an ongoing nature (like student fees), residual amounts in that category at the end of one school year should roll forward to the next year, and not be used for other purposes.
- c. Residual amounts in one-time sub-categories should be disclosed as such if they are to be transferred to other categories.
- d. Refunds should be considered where large surpluses remain in one-time sub-categories.
- e. Deficits for any category should not be permitted, unless subsidized by other general fundraising activities.

The Halton District School Board, expects each Family of Schools Superintendent to:

- 1. review the fundraising plan submitted by the Principals in each of their schools
- 2. ensure that all proposed fundraising activities demonstrate the values endorsed by the Board and recognize the Board's responsibility for the safety of its pupils

***Attached:***

- 1. Annual Fundraising Plan

