



PROCEDURE

SO-001

| FUNDRAISING | |
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| Superintendent Responsible: Superintendent of Business & Treasurer | Initial Effective Date: 2006/11/27 |
| Last Updated: 2023/04/24 | Next Review Date: 2026/04/27 |

Purpose:

To provide guiding principles and expectations regarding fundraising.

Guiding Principles:

- 1.0 All fundraising profits will be used to enhance educational opportunities or to improve the learning environment for students. This will be done in consultation with and with the approval of the Administrator(s).
- 2.0 All fundraising activities, including management of the banking, will be authorized by and the responsibility of the Administrator(s).
- 3.0 Student and employee participation in fundraising activities is strictly voluntary.
- 4.0 A plan for communication with parent(s)/caregiver(s) will be part of planning for all major fundraising events so that parent(s)/caregiver(s) and School Councils are informed of all major fundraising activities. Neighbouring schools should attempt to avoid fundraising activities that are concurrent with other schools close in proximity, both in timing and the nature of the activity.
- 5.0 Parent(s)/caregiver(s) permission will be sought for elementary students to participate in fundraising. Students should not be involved in door-to-door sales or canvassing without the supervision or permission of a parent(s)/caregiver(s).
- 6.0 The Administrator(s) will ensure that high pressure tactics are not used in fundraising activities. In any fundraising program, the safety of those involved must be given primary consideration. The Administrator(s) will ensure that appropriate safety precautions are outlined to all those involved in the fundraising activities.
- 7.0 Not every school has the same capacity to conduct fundraising activities; as a result, some schools may have access to resources which exceed what is available to students in other schools. Schools are encouraged to consider co-planning and co-fundraising with other schools whenever possible and as deemed appropriate by the school community.
- 8.0 Participation in fundraising activities for students is at the discretion of the Administrator(s).
- 9.0 Fundraising activities will be organized so that they cause limited interference with the regular school program. For school use for fundraising events, the school fundraising efforts will pay for the total of the custodial costs incurred. Fundraising events, where the school facility is required, will only be scheduled between September and June
- 10.0 The Administrator(s) will prepare an annual fundraising plan, documenting all scheduled fundraising activities for the school year, the estimated profit for each

- activity and purpose of the additional funds. It is understood that the profit from the fundraising activities for the current school year will support activities for the current year, unless the fundraising plan details multiple/long term fundraising activities for a large expenditure (i.e., Playground Structure). The fundraising plan will be included in the report, see item 11.6.
- 11.0 Strict financial controls shall be in place before the activity commences, and complete records of transactions will be available during and after the event. These controls apply to all fundraising activities operating in the name of the school or the name of Grand Erie. Fundraising groups who are officially constituted and who are required to report independently to another governing body may be exempt from these Financial Control processes (i.e., Parent Groups, Official Home and School Association member groups).
- 11.1 Fundraising proceeds and disbursements will be recorded in the *School Banking* software program at the school in a separate ledger account designated for the activity. This ledger account is to be established in the School Banking system, using Grand Erie standard school banking account codes designated for fundraising activities.
- 11.2 Fundraising receipts will be deposited on a regular basis in a registered financial institution. Schools will establish and maintain only one bank account for all school generated revenues. Therefore, separate accounts for School Council or Student Council will not be permitted. The only exception is when schools are required under legislation to open a separate bank account for lotteries, as per the Alcohol and Gaming Commission of Ontario.
- 11.3 When a school is closed by Grand Erie, all fund balances remaining in both the general fundraising account and lottery account, if applicable, will be forwarded for deposit to the account(s) at the school where the students of the closed school will be attending. Where the school population will be assigned to more than one school, the fund balances will be forwarded to the schools in direct proportion to the enrolment being assigned to each school
- 11.4 All accounts will be paid by cheque bearing the signature of two signing officers, one of whom will be the Administrator(s) or designate.
- 11.5 Cash handling will align with best practices as directed by Business Services Department.
- 11.6 Parent groups may be consulted before commitments or expenditures are made from funds raised by a parent group.
- 11.7 A report of the revenues and expenditures from the fundraising activity shall be provided to the School Council. The Administrator(s) and the School Council will determine the reporting frequency, with quarterly reporting recommended and minimum of annual reporting. The activity report will be included in the year end data provided to Grand Erie for consolidation with its financial statements annually at the end of August.
- 12.0 Cash draws, raffles, and cash lotteries will be approved by the appropriate regulatory body. When needed, permits and licenses will be taken out in the name of the school and signed by the Administrator(s). This will be done at least two weeks prior to the activity. Any activity involving the service of alcohol will follow the requirements for such events as set out in the Community of Use School Facilities Procedure (FA-004).
- 13.0 All items purchased with funds raised under the auspice of the school will follow Purchasing Procedure (BU-006). All items purchased become the property of Grand

Erie. Since Grand Erie will own and maintain all capital items purchased with fundraising monies, the Administrator(s) must ensure that items to be purchased meet Grand Erie's standards and specifications for furniture and equipment.

- 14.0 Items purchased through the fundraising efforts of a school committee will remain in that school.
- 15.0 Fundraising that involves high risk activities are not permitted. Contact should be made with the office of the Superintendent of Business and Treasurer regarding questionable activities.
- 16.0 Fundraising activity will not result in any employee or volunteer benefiting materially or financially.
- 17.0 Other considerations for fundraising:
- appropriateness of incentives
 - medically documented allergens of staff/students
 - culturally sensitive initiatives

Reference(s):

- Fundraising Policy (SO-01)
- Community Use of School Facilities Policy (FA-04)
- Community Use of School Facilities Procedure (FA-004)
- Community Use of School Facilities Handbook (FA-04-R)
- Purchasing Policy (BU-06)
- Purchasing Procedure (BU-006)
- School Councils (SO-02)