



Area:	Finance
Section:	Fundraising Policy
Date Approved:	
Date Revised:	

**PURPOSE**

The purpose of this policy is to address fundraising efforts at D.E.L.T.A STEAM Academy, henceforth referred to as DSA.

**GENERAL STATEMENT OF POLICY**

- A. The DSA Board of Directors (BOD) recognizes a desire and a need for fundraising.
- B. The DSA BOD also recognizes a need for restraint to prevent fundraising activities from becoming too numerous and demanding on employees, parents, students, stakeholders, and the general public.
- C. The DSA BOD has the responsibility to monitor, supervise, and control all fundraising activities associated with official school programs and activities, except extracurricular activities.
- D. DSA employees who supervise official school programs or extracurricular activities shall not organize, conduct, or involve students in fundraising activities unless the fundraising activity has been approved by the DSA BOD Fundraising Committee and it has been approved by the DSA BOD during a regular or Special Called Meeting of the BOD.
- E. The DSA BOD has ultimate responsibility for the conduct of all fundraising activities at DSA. The DSA BOD Fundraising Committee shall outline a process for fundraising that includes (at a minimum):
  - An approval process that will ensure fundraising activities align with the mission and vision of The Academy.
  - An “end of event” reconciliation or accountability process that includes a detailed account of funds received and expenses paid with copies of invoices and receipts as applicable. Fundraising drives for non-profit organizations or an individual cause (i.e. student diagnosed with Cancer), are only allowed if the event is sponsored by a DSA club or activity.
- F. Information pertaining to a fundraiser for an individual (verses a non-profit organization) must include a disclaimer that specifies that donations are not tax deductible. DSA does not permit fundraisers with any multi-level marketing arrangement companies, and will not endorse any business. However, many opportunities are available for business sponsorships or donations. DSA will acknowledge paid sponsorships and/or donations.
- G. There will be NO school related or school sponsored fundraisers associated with non-school sponsored events.

## DEFINITIONS

- A. Fundraising is the selling of a product, providing a service or activity, or requesting donations. School fundraising directly supports school programs and students.
- B. Student organizations are groups that are sponsored by the school and approved by the School Administration. They are designed to provide opportunities for students to participate, on an individual or group basis, in school and public events for the development of skills and other designated purposes. Student organizations are directed or supervised by DSA staff or DSA BOD Committee Members.
- C. A charitable giving campaign solicits funds for a charitable cause not necessarily directly related to any district goal.

## TYPES OF FUNDRAISING

For this policy, fundraising activities are grouped under the following categories:

- A. Student Organization Solicitations
  - a. Student Organizations include:
    - i. Student activities which include the sale of admission tickets to the general public and/or which are integrated into the curriculum (e.g., performances, theater productions).
    - ii. Student activities which include banquets, individual class clubs, language (e.g., Spanish club), music clubs and/or contests, speech, drama, student council, National Honor Society, student concessions (non-sports related), yearbook, and class trips.
- B. All School Fundraisers
  - a. These are activities where all students, families, staff, stakeholders, and the general public have the opportunity to participate and contribute to the activity. They are typically done for particular school-related items and may also be an ongoing and rotating fundraiser for the whole school (such as Read a Thon).
  - b. Fundraisers conducted by the DSA BOD will be open to students, families, staff, stakeholders, and the general public.
- C. Charitable Giving Campaigns
  - a. The campaign is being conducted to provide money for a charitable cause not necessarily directly related to any DSA school goal. Students sell a product, their effort (e.g., walk-a-thon), a service (e.g., car wash), or contribute money.
- D. Grant writing
- E. DSA BOD Contributions
  - a. The DSA BOD may elect to utilize funds collected from personal contributions as a means to support fundraising efforts.

## GUIDELINES FOR APPROVAL OF FUNDRAISING ACTIVITIES

- A. All fundraising events shall be organized by the DSA BOD Fundraising Committee with prior written approval of the DSA BOD.
- B. The DSA BOD Fundraising Committee will consider fundraising proposals and approve or disapprove fundraising activities in collaboration with the School Administration. The DSA BOD Fundraising Committee will be responsible for approving all requests by any group within the school to raise funds for items or services to be purchased with those funds. All requests for fundraising shall include a specific purpose for the fundraising activity.
- C. Preference may be given to expenditures that directly enhance the learning experience of DSA students.
- D. Preference will also be given to expenditures which meet the DSA school goals.

- E. Exceptions to this may be funds raised for a specific item or service. Records must be kept on the amounts raised for designated projects (revenues and expenditures).
- F. The DSA BOD will remain informed of and be required to approve fundraisers at a general BOD or Special Called Meeting.

## IMPLEMENTATION GUIDELINES

- A. Student safety must be a top priority.
- B. Participation in fundraising activities is voluntary. No student will be excluded from an event or program due to non-participation by the student or their parents in fundraising activities. *Note: Fundraising efforts may be used to lower the cost of activities for students. Choosing not to participate may increase the cost for the student.*
- C. Parents/guardians must be notified prior to student participation in fundraising activities outside of the school setting.
- D. Group (i.e., class, team, or grade) incentives are the preferred means to motivate and reward students when fundraising.
- E. Door-to-door sales. Parental supervision and caution are advised.
- F. Door-to-door fundraising activities will be of a limited nature.
- G. Fundraising activities during the school day will be limited and must not conflict with state laws and regulations relating to foodservice programs.
- H. DSA school funds cannot be used to offset, fund in advance or pre-pay expenses for charitable fundraisers.
- I. All fundraised monies will follow and comply with accepted accounting procedures. Reporting requirements are as follows:
  - a. The person responsible for the fundraising should work with the DSA BOD Treasurer, CFO, and the DSA BOD Fundraising Committee to detail and report on expenses, gross revenue, and net revenue, a number of students or families involved, date started and completed, and recommendation for repeating or not repeating in the future.
  - b. For ongoing fundraising activities, quarterly and annual reports must be provided.
- J. All fundraising activities must comply with state law.
- K. DSA expects all students, parents, staff, and volunteers who participate in approved fundraising activities to represent the school, the student organization, and the community in a responsible manner. All rules about student conduct and student discipline extend to student fundraising activities.
- L. Funds which are raised should complement, not replace, state and federal funding.
- M. Fundraising goals must be developed in advance of the fundraising activity, including specifying the beneficiary of the funds and their specific purpose and be approved by the DSA BOD, DSA BOD Fundraising Committee and School Administration.
- N. The individual who requested funds must report back to the DSA BOD Fundraising Committee with the completed fundraising form and a copy of profit and expense of the fundraiser.
- O. All funds collected during any fundraising activity must be submitted to the DSA CFO, DSA BOD, and DSA Fundraising Committee within 7 business days of the conclusion of the event. Delays in the receipt of funds must be approved prior to the approval of the event.

## SOLICITATION OF FUNDS

- A. All fundraising solicitations must be pre-approved by DSA BOD and DSA BOD Fundraising Committee. 2. One school employee or member of the DSA BOD Fundraising Committee should be designated as the contact person for each fundraiser. This person should be available to answer any calls on solicitation and is the designated person to retain copies of all letters/requests for solicitation.

- B. All letters/requests soliciting funds should be dated and numbered sequentially. The request should clearly identify the purpose of the solicitation and describe its programs in clear and specific language. At minimum, the solicitation request should have the following:
- a. Date
  - b. Solicitation Number
  - c. Name of Organization
  - d. Address
  - e. Purpose – What money is being requested for
  - f. Contact Person at School and Phone Number
  - g. Statement that check should be payable to: D.E.L.T.A. STEAM Academy. Donors should be encouraged to make contributions by check and make check payable to DSA. Cash is not encouraged. Checks should not be made out to the individual collecting the donation.

#### USE OF ALL SCHOOL FUNDS

- A. Fundraising events for the whole school must have a specific purpose designated for the fundraised funds raised. The use of funds will be identified on or added to the annual school budget.
- B. School fundraisers (e.g. Read-a-Thon, donations from individuals or organizations that have not designated a specific purpose) will have funds placed into the school's operating account. Funds collected from fundraisers will be listed as a separate line item.
- C. The proposed use of undesignated school fundraised funds will be designated by the DSA BOD and consider school goals when making decisions.
- D. Fundraising funds approved over \$1000.00 will be presented to the DSA BOD for final approval.
- E. Guidelines for the use of funds raised by individual students
  - a. All fundraising throughout the student's enrollment at DSA is to benefit a specified group or activity (Class of 20XX, ClassTrip, etc.).
  - b. Fundraised earnings may be earmarked for the specific student who put forth the effort. However, if that student is not going to use these funds for the intended purpose (see #c below), *those funds revert to the specified group's control for redistribution. The funds are NEVER* the individual student's funds.
    - i. A parent or student may NOT request to "gift" either unused or excess earnings to another specific student or parent chaperone (within the same class OR in a different class).
    - ii. Unused or excess funds raised will not be refunded to the student.
  - c. Acceptable use of Fundraised Funds is limited to the following:
    - i. Payment for the student's portion of the specified activity (Grade Retreat or School-sponsored trip) or payment for the student's Party Fee
    - ii. Fundraised funds can ONLY be used to benefit:
      1. An enrolled student or DSA BOD-sponsored organization at DSA
      2. A chaperone assigned by the DSA School Administration to accompany the group
    - iii. Unused funds that were designated for trip or activity, which is repeated annually, or within two-years may be shifted into the group account for the next trip or activity. For example, unspent funds from one grade class on their class trip/class party may be shifted to the class for the following year once the account has been reconciled.