



## **The GLOBE Academy Fundraising Policy**

### **Purpose**

The GLOBE Academy, Inc. (GLOBE) seeks to strengthen ties within the school's community and the broader DeKalb community, to enhance the resources and opportunities available to GLOBE students. Such resources supplement those provided by DeKalb County and other governmental entities. Through the procedures governing

GLOBE's fundraising activities, the school aims to:

- Build resources that improve educational programs and benefit all GLOBE students;
- Create greater awareness about GLOBE in the DeKalb County community;
- Protect students, parents, administrators from fundraising efforts that are excessive, exploitative, lacking in educational merit or detrimental to the educational process;
- Implement a smooth and understandable procedure for how fundraising decisions are made;
- Assure that public funds are protected and accounted for in a transparent manner, providing color on how funds are used; and
- Confirm that all fundraising and expenditures comply with county, state and federal laws.

### **Guiding Principals**

All revenue-generating activities must support GLOBE's vision and mission. Fundraising proposals should answer the following questions:

- What is the purpose for the additional funds?
- How much revenue is the fundraiser intended to generate?
- How does the fundraiser align with our vision and mission?

### **Scope**

This policy applied to all GLOBE administrators, board members, educators, staff members, students, organizations affiliated with the school and volunteers. All activities must follow GLOBE's core values of Community, Respect, Empathy, Sustainability and Trust.

### **General Fundraising Guidelines**

- The Executive Director, and the Board of Directors, reserve the right to restrict or limit any fundraising activities associated with GLOBE.
- Faculty and student participation is typically voluntary. However, employees may be asked to supervise some activities as a part of their employment duties.

- Students are not required to participate in fundraising to belong to a club or team. In addition, participation in a fundraising activity shall not affect a student's treatment or classroom performance in any way.
- Classroom prizes for fundraising must be approved by the Executive Director.
- Sales quotas may not be imposed on GLOBE families, and families are not required to pay for any unsold items that are returned to GLOBE.
- Fundraising activities that could expose GLOBE to the risk of financial loss or liability are discouraged. Such fundraisers require Board approval.
- Existing school accounting systems and procedures are used for all school-level (GLOBE) fundraising activities. Records of fundraising efforts, including accurate reporting on participation levels and financial outcomes, is open to parents, students and donors. However, personal fundraising information is not released outside of school administration, the Development Committee and the Board of Directors. The GLOBE Academy, Inc. is not responsible for providing accounting oversight of school-affiliated fundraisers run by others (PTCC, athletic teams, clubs or other groups).

### **Fundraising Approval Process**

GLOBE families are targeted for many fundraisers through multiple channels. ~~In an effort to control~~ To strategically plan the number of asks from the GLOBE community, all fundraising requests must be preapproved by the Executive Director and reviewed by the Development Committee.

To minimize requests from GLOBE families, any major new fundraising request should replace an existing fundraising effort whenever possible and as determined by the Development Committee and Executive Director.

### **Fundraising Goals**

~~Every January, the~~ Fundraising goals for the following school year are defined ~~in the January by the~~ Development Committee. The Executive Director and the school's Chief Financial Officer set the targeted fundraising goals in conjunction with the Development Committee.

Any other GLOBE related organizations, which may include the PTCC, athletic teams, clubs or other groups, should also provide a budget for the following school year to the Executive Director and Chief Financial Officer ~~in January of each year for prior to~~ end of the ~~following current~~ school year. If funds are to be raised from the GLOBE parent and student body to meet their needed revenues, the Executive Director must approve their budget. If it is not possible to anticipate the needs so far in advance of the following school year, the previous year's budget can be used as a proxy.

### **Use of Funds**

The Development Committee provides as much color and clarity regarding the intended use of raised funds as possible to increase transparency for the school's donors. In many

cases, funds may be needed for an unexpected need not anticipated in the annual budget. GLOBE's Board of Directors and administration have the right to allocate and shift funds to best meet identified school needs unless they are directed funds (see next section).

### **Directed Funds**

Except for funds raised through grants, directed funds are not accepted without the approval of the Board of Directors and the Executive Director.

### **Advertising and Sponsorships**

Any equipment, materials, funds or contributions that include the donor's corporate logo does not constitute an implicit endorsement of that business or organization. The acceptance of school advertising from an advertisement agency does not imply an endorsement of the advertiser's business. GLOBE does not make any representations or warranties regarding business advertisements made in, or around, school property.

School sponsorships from individuals or organizations is the act of supporting an event or the school financially through the provision of products, services or activities, in exchange for rights (including naming rights) or certain specified benefits (such as logo placement or public acknowledgement). Sponsorships can provide a mutually beneficial and purposeful relationship between individuals, organizations and the GLOBE Academy.

Sponsorship activities of \$5,000 or more must be approved by the Development Committee and Executive Director to ensure the GLOBE Academy is engaging in sponsorship activity that:

- promotes and improves educational outcomes;
- supports corporate and school goals and objectives;
- increases effectiveness of strategic educational programs;
- engages or builds relationships with key stakeholders; and/or

communicates key messages to target audiences.

### **DEVELOPMENT COMMITTEE MEMBERS**

The Development Committee is a standing committee of the Governing Board. The Development Committee Chair shall invite other members to join the Development Committee as appropriate in his/her discretion.

In addition to the Development Committee Chair (which shall be a current Board member), the Development Committee may include:

- Executive Director;
- Chief Financial Officer;
- Chairman of the Governing Board;
- Representative of the Parent Teacher Community Council (PTCC);  
Annual Fund Lead or Representative; and
- Volunteers.

The Development Committee may collaborate with the PTCC to spearhead various fundraisers. In these instances, the PTCC member leading the fundraiser reports to the Chair of the Development Committee, or his/her designee, at each relevant Development Committee meeting regarding the event's progress.

If there are concerns about any fundraiser, the Development Committee reserves the right

to remove any individual running such fundraiser and identify a replacement.

### **Existing Annual Fundraisers**

**Annual Fund** – This annual fundraiser, ~~which is held in the fall,~~ is the backbone of GLOBE’s fundraising effort. Every year, GLOBE contacts members of the GLOBE community and companies ~~who may want to support GLOBE,~~ to raise the funds necessary to meet the school’s operational budget goals. ~~From 2013-2016, GLOBE has held a “Fun Run” to support multiple school fundraising needs. Going forward, the Fun Run is considered a part of GLOBE’s Annual Fund, as one large fundraiser. The Annual Fund is GLOBE’s largest annual fundraiser. As a public charter school, GLOBE receives some of its funding from DeKalb County; however, charter schools do not receive the same level of funding as traditional public schools. The Annual Fund supports the continued educational excellence and continued growth of the GLOBE community. Every unrestricted dollar contributed is used to provide for the outstanding faculty, programs, and improved facilities that directly benefit GLOBE students every day. GLOBE families are asked to give directly to the Annual Fund each year.~~

**GLOBE Trot** – The GLOBE Trot Fun Run provides another opportunity to raise money for GLOBE’s Annual Fund. GLOBE students are asked to get donations from external audiences, including grandparents, extended family, neighbors, friends, etc., as part of an event. Students run, walk, skip, race and exercise their way around a track while parents and supporters line the course to cheer them on.

**GLOBE Rocks** – Families are encouraged to attend GLOBE Rocks, an annual music benefit concert. All dollars raised in this portion of the Annual Fund go directly to the GLOBE’s music program.

**Auction** – The school’s auction, which is the major spring fundraising event, consists of a live auction, a silent auction and a raffle event. Auction tickets are made available to GLOBE families, potential GLOBE families and other interested parties. GLOBE parents and community members may support the auction through the purchase of tickets, donation of auction items, purchase of items at the auction and recruitment of auction attendees. A portion of the net proceeds raised from the Annual Fund and/or the auction, as determined by the Executive Director and Board of Directors, is allocated to school- related organizations such as the PTCC. The amount allocated is determined based on their respective budgets and other factors as determined by the Executive Director and Board of Directors. ~~For the 2016-2017 school year, a~~All net proceeds from the auction ~~shall~~ go to support the PTCC’s goals and efforts.

### **Ongoing Fundraising Efforts:**

**Grants** – Seeking, and submitting, grants is a time-consuming process. Each January, the Development Committee receives specific needs from the Executive Director which frame the school’s grant focus. The grant process involves ~~four-six~~ steps: generating an idea, finding funding, developing a proposal, submitting a proposal, managing the award and sharing the results. ~~building/maintaining a grant database, researching grants, completing/submitting grants and networking in the non-profit/business community.~~ A

subcommittee of the Development Committee is charged with leading the school's grant efforts and provides updates at each Development Committee meeting.

**Classroom Supplies**– School staff members and teachers have needs that arise specific to their classroom or project. The following protocol should be followed:

**Supplies:**

- a.) Basic classroom supplies should first be funded and sourced through GLOBE's operating budget. In an effort to create uniformity, the Executive Director, or someone appointed by the Executive Director, works with teachers and classroom parents to understand each class' specific needs. There should be a uniform "ask" of the parent body for classroom needs at designated times of the year. Funds may not be collected unless cleared by the Executive Director outside of the designated times. Amounts collected by room parents for each classroom should not exceed total limits as directed by the ~~Development Committee~~Executive Director.
- b.) Any additional classroom needs must be approved by the Executive Director. Mini-grants can be requested from the PTCC. If an additional ask of classroom parents is deemed necessary, the Development Committee should be notified to track how much is being asked of GLOBE families throughout the year.

**Staff/Teacher Gift Fundraising:**

- a.) Staff/teacher gift fundraising (for birthdays, end of semester gifts, etc.) may be coordinated by the PTCC through classroom room parents or through centralized funds collected at open house. The amount gifted to teachers from these funds are communicated by the PTCC at the beginning of each school year. Amounts collected for each classroom should not exceed total limits as directed by the ~~Development Committee~~Executive Director.
- b.) Parents may choose to provide additional gifts to teachers at their own discretion.

**Additional Fundraisers**

Any additional fundraising requests must be approved by the Executive Director and the Development Committee. However, fundraisers below \$2,000 can be approved by the Executive Director without the Board's approval. Ideally, any major fundraising request replaces an existing fundraising effort. Requests made to GLOBE families should be kept to a minimum.

**Donor Tracking and Recognition**

- a.) The Development Committee is responsible for tracking all external fundraising requests from GLOBE and affiliated organizations across all fronts. All administrative, board-level, classroom-level or school organization requests must be shared with the Development Committee. This helps avoid donor fatigue with the local community and businesses. The school needs to make sure it understands all of its donor touch points.
- b.) At minimum, all donations to GLOBE given by an individual or organization over

the course of a single school year that total ~~in excess of~~ \$1,000 or more receive a personalized thank you from the Executive Director and/or Chairman of the Board of Directors. ~~Donations to GLOBE of over \$2,000 receives a thank you from the Chairman of the Board of Directors.~~

- c.) Affiliated organizations are responsible for providing receipts and thank you for donations to such organizations.
- d.) In addition to items a) and b) above, all fundraisers are encouraged to have donor appreciation plans in place to foster and sustain donor relationships.
- e.) All receipts for donations to GLOBE are generated by the school's administrative office, in accordance with tax rules and regulations.

### **Master Calendar**

The school administration keeps a master calendar for all fundraising events. Any new fundraisers, or date changes, must be added to the calendar by the Executive Director or a designee of the Executive Director. No new events are approved without first consulting the calendar for conflicts or closed periods. For recurring/annual events, the Development Committee establishes the event dates in conjunction with school administration before the start of the school year.

### **Fundraising Excess**

If the targeted goal for any fundraiser is exceeded each year, the Fundraising Chair, Development Committee, the Executive Director and/or the Finance Committee proposes to the Board of Directors how excess funds raised should be used. Any decision must receive Board approval.

### **Class Trip and School Organization Fundraisers**

- a.) This section pertains to classroom field trips, sports teams, school clubs and other organizations.
- b.) To encourage inclusivity, dues for any school organizations should be kept to a minimum.
- c.) Extracurricular groups, and classroom opportunities, are an essential part of a well-rounded education. In some cases, clubs or groups affiliated with GLOBE may have an event that requires funding that may be excessive for some families.
- d.) When possible, the Executive Director should be notified of these events at least three months in advance.
- e.) While families tied to these events provides some financial support, additional fundraisers can be used when approved by the Executive Director.
- f.) Each group may also apply for a mini grant from the PTCC for funding support if funds are available.

- g.) There is a limit of two fundraisers per club or group per year. These may include the sale of goods or services to GLOBE parents, students and staff. It may also include privileges offered (ex. no uniform day, or pizza lunch) to fellow students.

## **Community-Based Fundraisers**

A key tenant of GLOBE's CREST is "Community." The GLOBE school community believes it is important to teach children to help those around us.

- a.) The best way for GLOBE students to help others is through community service. Efforts to support local charities, or causes, should focus on service projects first.
- b.) Any service projects sponsored by or promoted to the GLOBE community by GLOBE must be approved by the Executive Director. While the school wants to encourage its children to help others, maintaining the safety of its students is paramount.
- c.) The collection of goods (i.e., canned goods or clothing) to support various charities is acceptable. Such efforts are limited to no more than three events in a given school year. They operate on a first come, first serve basis requiring Executive Director approval.
- d.) Authorized community-based fundraisers can be referenced in GLOBE weekly or other news publications.
- e.) Direct communication for fundraising or solicitation of goods is limited and must be approved by the Development Committee.

## **Unanticipated Scenarios**

The Development Committee acknowledges that the GLOBE Fundraising Policy may not anticipate every issue or scenario that may arise. For that reason, the Board of Directors reserves the right to impose restrictions or limitations regarding any and all fundraisers. These may be in addition to those set forth in this policy.