
**Community School for Creative Education Fundraising Policy
September 4 2013**

Purpose

This policy sets forth guidelines and direction related to fundraising. This policy is designed to accompany the policy of Classroom Accounts when complete. Note that class field trips are not covered by this policy; see the policy on Field Trips.

Background

California public schools receive funding from the state to support their education activities. However, state funding typically is not adequate to fully sustain the school in its efforts to meet the needs of their children. In most California schools, as a consequence, families raise additional funds in a variety of ways to assure that legitimate pedagogical requirements are met. A substantial part is raised each year through private and public fundraising. Community School seeks the majority from private and corporate sponsors. Families can help in small but key ways.

At Community School, families can provide financial support in a number of ways:

- By participating in all-school fundraisers or in individual class fundraisers;
- By making direct contributions to the class (field trips, celebrations, and other approved purposes);
- By making direct donations through check, credit card or electronic funds transfer; E-script; Target RedCard; FirstGiving at <http://www.firstgiving.com/CommunitySchool> Employer Matching; Pay Roll Deductions; or Estate Planning;
- By making donations to the Annual Giving Campaigns.

Scope

All fundraising activities conducted on behalf of the Community School, whether on or off campus, are covered by this policy. These primarily include the following four types of fundraisers:

1. The Planned Annual Giving Campaign
2. Large Scale Fundraising Program—Spring Gala

3. School-Wide Fundraisers—Harvest Festival & Spring Festival
4. Class Fundraisers

Objectives

The objectives of Community School fundraising are:

- To provide financial support for the purpose of enhancing and expanding school programs
- To encourage partnerships that foster better understanding of the Community School as Waldorf inspired, standards aligned, equity focused community charter within the community
- To create a culture of involvement, giving and cooperating among parents, they're families, business and community members and the school.

Relevant Fundraising Entities

The Community School Board of Trustees is the governing body of the overall Community School for Creative Education community. The Board has overall responsibility for both the fiscal health of the school and the appropriateness of all fundraising activities associated with the school.

The Board guides all other fundraising entities and activities by setting school policies and determining the priorities of how fundraising proceeds should be allocated to or on behalf of the school. The Board is the final decision maker over any fundraising disputes.

The Community School Principal in consultation with the Executive director is the operational authority on business matters at the school. The Principal works collaboratively with all the fundraising parties to ensure the fundraising activities operate in accordance with school policies.

[=The **Fundraising Committee** is an Administrative Committee made up of the Executive Director, the Principal, at least three parents and if possible a faculty member. The purpose of the committee is to identify and target school wide fundraising opportunities, to evaluate the appropriateness of newly proposed fundraising events and activities, to ensure they do not conflict with other school activities and fundraising programs, and set up sub committees for effective execution of evens as needed.

When formed, the **Marketing and Public Relations Committee** (MPR) is responsible for all communication with the various elements of the school community (faculty, families, , etc.) as appropriate with respect to all fundraising activities to ensure appropriate and consistent messaging. The MPR Committee may delegate communication activates to the appropriate Parent committee.

Types of Fundraisers

1. Annual Giving Campaign

What is it?

- The Annual Giving Campaign (AGC) is designed to become the school's flagship fundraising program that obtains pledges and subsequent donations throughout the year from donor and any associate corporate matching. The Community School AGC is launched each year at Back to School Night

Who leads it?

- The Administration leads the operation of the AGC through a designated chair and Committee. The Committee collaborates with the Fundraising Committee, Parent Volunteer Committee and School Administration to obtain pledges and promote the program.

How is the money handled?

- The Community School annual budget includes the AGC, which is reviewed and approved by the Board per a Community School MOU.
- The Community School Board Treasurer ensures AGC expenses are reasonable and relevant.
- Proceeds from AGC are unrestricted dollars that fund Community School grants made to or on behalf of our school per priorities of the Board

2. Large Scale Fundraising Programs: Spring Gala Concert

What are they?

- The Community School Large Scale Fundraising Programs are events or activities that involve not just Community School families but also the larger surrounding community and potentially external donors. These include but are not limited to reception and dinner galas, silent auctions, major grant applications, corporate donations, and capital campaigns.

Who leads them?

- Community School designates a specific program chair and a supporting committee to lead and manage the program.
- The Fundraising Committee plans and coordinates Large Scale Fundraising Programs in collaboration with the School Administration and Parent Volunteer Committee..

How is the money handled?

- The budget for these Programs must be included in the Community School annual budget which is reviewed and approved by the Board per the Community School MOU
- The Community School Board Treasurer ensures expenses are reasonable and relevant

Proceeds from Large Scale Fundraising Programs are expended per the priorities set by the Community School Board.

3. School-Wide Fundraisers (Harvest Festival; Spring Festival; Walk a Thons, Spirit Wear, and other activities)

What are they?

- School-wide fundraisers are events and activities that involved the larger school community. They may be primarily intended to raise money or they could also be primarily intended to be a social community event that may happen to have a fundraising component. School-wide fundraisers include but are not limited to walk-a-thons and seasonal celebrations (this year: Cinco De Mayo, Earth Day, Spring Celebration).

Who leads them?

- The Fundraising Committee coordinates school-wide fundraisers in collaboration with the parent volunteer committee and the school administration.
- The Festival committee designates a specific fundraising Chair who has committed to leading and managing the fundraiser to completion. With the Chair's commitment, the fundraiser will not be authorized to occur. The Chair may also form a supporting committee.
- For new School-wide Fundraisers, the Chair must obtain authorization to proceed through the Fundraiser Approval Process detailed below at least one month in advance of the activity.
- The Chair must obtain approval or delegated authority from the MPR Committee on the design of all marketing and advertising materials at least one month prior to the date of the fundraising event.

How is the money handled?

- The Fundraising Committee and/or the Fundraising Chair must submit a budget for each school-wide fundraiser to the Business Manager or Principal at least one month prior to the date of the fundraiser event or the beginning of the fundraising activities. NOTE: The Community School annual budget already includes the budget for recurring events and activities. The Business Manager or Principal may waive the need for submitting a budget in advance depending on the scale of the event.
- The Fundraising Committee ensures expenses are reasonable and relevant.
- The fundraising Committee and the Fundraising Chair must provide a close out financial statement to the Business Manager or Principal and Board Treasurer detailing the resulting revenue, cost and net income of all funds.
- All proceeds from school-wide fundraisers are unrestricted funds that contribute to Community School grants made to the school per priorities of the Board of Trustees. Proceeds are defined as the total revenue generated by the fundraiser less the total direct costs of putting on the fundraiser.
- Community School budgets an annual contribution to make to each class account.
- **Class Fundraisers**

What are they?

- Class fundraisers are defined as fundraisers that involve one class only and are not part of a school-wide event with the class receiving all the funds.

Who leads them?

- The Class Teacher designates a specific Class fundraiser Chair: the Class Fundraiser Chair works in collaboration with the school administration, the Fundraising Committee, and parent volunteer committee as needed to operate the class fundraiser.
- The Class Teacher ensures the Fundraising Committee and parent volunteer committee are notified of any Class Fundraising events /activities.
- For new class fundraiser, the Class Fundraiser Chair must obtain approval per the Fundraising Approval process one month in advance of the event or beginning the activities.

How is the money managed?

- Each class has a designated Class Account created under the Community School that is managed by the Class Teacher.
- The Class Teacher ensures expenses are reasonable and relevant.
- Proceeds from Class fundraiser must be deposited into Class Accounts. Funds raised generally are used to support class events and field trips. NOTE: Classroom educational materials and supplies are paid for and provided directly by the school, not the Class Account.
- Funds in Class Accounts must be processed and held in accordance with the Class Account policy. Please see the Class Account policy for a detailed description.

Fundraising Approval Process

A fundraising proposal is authorized to proceed if the designated parties as stipulated in the Approval Process approve it. A fundraiser may not be implemented until this process has approved it.

1. A Fundraising Request Form is submitted to the Fundraising Committee for consideration.
2. The Fundraising Committee asks three questions about each Fundraising proposal:
 - € Does the proposed event/activity conflict with the mission/values/priorities of the School?
 - € Does the proposed event/activity conflict with the Annual Giving Campaign? In other words, is it likely that this event/activity will negatively impact the results of the Annual Giving Campaign?
 - € Does the proposed event/activity conflict with any other event/activity already on the School's Master Calendar?
3. If the answer to ALL three questions is "No", then the committee shall accept the proposal request. If the answer to any of these three questions is "Yes" according to the majority vote of the committee, then the committee must either turn down the proposal or ask that it be reworked so that it no longer violates any of the three stated requirements. If the Fundraising Committee accepts the proposal, it is submitted to the Business Manager for financial and liability review.
4. In the case of a Class fundraiser, the Business Manager or Principal makes the final decision. The Business Manager notifies the Fundraising Chair of the decision including any reasons or suggestions for changes if the request is denied. When the Class Fundraiser is approved, the Fundraising Chair must notify the person in the administration in charge of the Master Calendar.
5. In the case of a School-Wide fundraiser, the Business Manager or Principal submits the proposal to the Fundraising Committee for review. The Fundraising Committee will evaluate whether the necessary leadership and resources are available to successfully carry out the fundraising event or activity. The Fundraising Committee makes the final decision for the school-wide fundraises. The Fundraising Committee notifies the Fundraising Chair, the Business Manager, and the parent volunteer committee of the design including any reasons or suggestions for changes if the request is denied. When a School-/wide fundraiser are approved, the fundraising Chair must notify the person in administration responsible for the Master Calendar.
6. The Fundraising Committee reserves the right to revisit any approved fundraiser in the event any issues envelop with the fundraiser or the circumstances of the school change. The fundraising committee, at its discretion, may rescind the approval of any previously approved fundraiser.

Master Calendar

The School Administration will keep a master calendar for all fundraising events. When a Fundraiser is approved, the Fundraising Chair notifies the person in administration responsible for the Master Calendar to put the event on the master calendar. No approvals will take place without first consulting the calendar for conflicts or closed periods (see approval process above). For recurring events, the parent volunteer committee established the dates in collaboration with the School administration before the start of the school year.

Off-Site Fundraisers

Fundraiser that are held off the school site and do not involve the solicitation of families and staff for the school must still be approved by the Fundraiser Approval Process. This includes but is not limited to bake sales, garage sales, car washed and other sales and services activities.

General Guidelines

- Any gift or donation that adversely impacts upon adopted curriculum, infringes on instructional time, or poses a burden or places undue pressure upon students, parents, or school employees at work, in the community or at home will be declined. The fundraising Committee or the Board is responsible for making this determination.
- Any fundraising proposal, gift or donation that is deemed contrary to the vision and mission of the school will be declined. The Fundraising Committee, or if necessary the Board, is responsible for making this determination.
- Participation in fundraising activities is strictly voluntary. Students, parents and school employees may not be pressured or coerced in any matter to support such activities.
- In no instance shall participation in or support for a fundraising project be used to determine a student's eligibility to participate in school-related programs or activities.
- All fundraising shall be for predetermined purposes and funds collected may be spent only for those purposes.
- Students are not to be directly involved in fundraising activities without prior approval of the Fundraising Committee.
- Any gift or donation that requires an endorsement of the organization, individual or product must be approved in advance of acceptance of the funds by the Board.
- All fundraising financial transactions shall be conducted with the highest integrity. All financial transactions are subject to review and approval by the relevant account treasurer.
- All fundraising financial transactions are to comply with the standards accounting and operational practices published by Community School as fiscal policies.
- All fundraising expenses shall be reasonable in amount and relevant in-kind to the spirit and purpose of the activity or event. Any concerns of inappropriate or excessive expenses shall be immediately brought to the attention of the Business Manager or Principal. The Business Manager or Principal will engage the Board Treasurer and Board as needed to investigate and address.

This policy supersedes all previous policies related to fundraising