

# Fundraising Policy

*A Handbook for students, coaches,  
teacher sponsors, chaperones and parents.*



*Tolerance, Respect, Unity, Excellence*

*Approved by CBRH School Council - June 18, 2009 Amended on June 14, 2010*

## **CORNER BROOK REGIONAL HIGH FUNDRAISING POLICY**

**Policy Statement:** Corner Brook Regional High (CBRH) supports fundraising efforts in support of school programs and activities within Legislation, School Board expectation and policies and acceptable community norms as established by Council.

**Rationale:** CBRH recognizes the need for the school community to host fundraising events each year to enable the school to enhance school related programs. CBRH recognizes the need to provide students, teachers, parents and community volunteers with a framework and parameters for raising funds to support school activities and programs and for disbursing those funds.

**Scope:** This policy covers all fundraising activities undertaken by all students, teachers, parents and community volunteers in the name of CBRH and all its associated components and includes the disbursements of those funds.

**Guiding Principles:** This policy is based on the following guiding principles. In times of uncertainty, when trying to interpret the intent of the policy, these principles should provide some clarification and guidance.

- A. Under the School Act 1997 of Newfoundland and Labrador (the Act), Clause 26.3.c states that “The school council shall approve and monitor activities for the raising of funds for the school”. It is from that responsibility that this Policy is enacted.
- B. Clause 26.4 of the Act states “The school council may, subject to the by-laws of the board, approve a levy, the payment of which is voluntary, once in a school year, instead of, or as a supplement to, fund raising activities for the school.” This implies that only school Council has the authority to approve levies and payment of any and all levies is completely voluntary.
- C. Clause 13.1 of the Act states that “A fee shall not be imposed upon a student or parent of a student with respect to the enrolment or attendance of that student or a program or course of study undertaken by that student in a school other than a private school.” Sub-section 1 above shall not apply to “(a) a fee for the cost of supplies provided to a student; or (b) a fee for other services provided to a student outside school hours” This suggests that a school “fee” may be applied for the cost of supplies supplied to a student or for services provided outside school hours. There is no reference in the Act to School Council having the authority to approve School Fees so this Policy assumes that the School Administration is entirely responsible for any and all imposed “Fees”.

- D. This Policy differentiates between School Fees and School Levies simply based on the specifics of the application. Where the charge applies to:
- a) only specific students doing a specific course; and
  - b) an identified listing of supplies those specific students require to complete the course that are not provided through Government/School funding, and
  - c) is complete with identified costs for those supplies,

then the charge to students shall be a “Fee” and is not voluntary nor subject to School Council approval. The Fee shall be on a cost recovery basis only and applies only to those supplies provided to the student. Rental of school property such as band instruments shall not be subject to School Council approval and shall not be considered either a Fee or a Levy for the purpose of this Policy.

- E. In cases where a group of students and/or parents decide that they will bear the costs of a school related function entirely of their own resources and not solicit any support from either the School or any third parties, School Council approval for fundraising shall not be required. In such cases, given it is still a school related activity and given the Principal is ultimately responsible for school funds and given the School Board requires all school funds to be held in school bank accounts, the Principal still has to be consulted prior to such a decision being finalized and he/she has the right to require the funds be held in a school account and be subject to normal spending limitations as outlined in this policy.
- F. Participation in fundraising activities shall be completely voluntary and a parent/student shall have the right to decide which, if any, activities he/she will participate in. For activities that involve group participation such as bottle blitzes, car washes, etc. the funds raised shall be split equally amongst only those who participate in the group activity on a student basis. In some cases, where it agreeable to the group, a suitable substitute person may replace a student/parent in the group activity where the intended person is not available with just cause. Where multiple persons may represent or assist one student in a common fund raising activity, that student will still qualify for only one share of the funds raised and not multiple shares based on the numbers of persons representing or assisting him or her.
- G. To permit all students the opportunity to fund raise with a school sponsored activity for their portion of individually assessed costs, recycling has been designated as an opportunity for students/parents to raise funds and also have the MMSB contribution accrue to their individual contribution (Refer to Clause 36).
- H. For the purpose of accounting, individual credits and possible refunds, this policy recognizes two general types of fund raising activities:

- The first type involves participation in activities where support is solicited from third parties through such means as bottles blitzes, food sales, ticket sales, etc. In such cases all those students who participate in the event are entitled to a portioned credit from the funds raised.
  - The second type of fund raising is where a parent/student pays cash or provides his/her own recycling vouchers to go towards their own portion of the events cost.
- I. Groups involved in fundraising should limit their activities to raising only the amount of funds required to cover their actual estimated expenses. There are many groups involved in fundraising and consideration should be given to the needs of others and to the public that supports everyone's efforts.
  - J. When distributing costs of a school activity, the principle of each participating student supporting an equal share shall apply. For instance if there are 10 students participating in a school activity for which fundraising is involved , the cost of participating in that activity will be portioned at one tenth of the total cost to each student.
  - K. When applying credits for each student towards his/her cost, the first credits to be applied are those that come from the students/parents participation in common fundraising activities.
  - L. When applying credits for each student towards his/her cost, the last credits to be applied shall be out of pocket expenses, including recycling. If these are surplus credits, they are subject to possible refund to student/parent who contributed them. (See Clause 31)
  - M. Fundraising (except for recycling as defined in Clause 36) shall not be undertaken to support elective school trips such as those tours offered through commercial companies (e.g. EF Tours). Such trips do not require School Council approval.

## **Fundraising Approval Procedures**

1. In accordance with the Schools Act, 1997 all fundraising for the school must be pre-approved by the CBRH School Council.
2. As early as is practical each year, all individual school groups that wish to solicit parent/student, school or public funding must submit in writing to the School Principal, an outline of their planned activities, an estimate of their funding requirements for the year broken down by activity, and an outline of their fundraising plans for the year. (See Appendix "A" for sample form to be used)
3. As early as is practical each year, the School Principal or designate shall bring forward to the School Council for approval those requests that involve soliciting support from school or third party (public) funds and that are also supported by the Administration.
4. School Council can deal with the requests at a joint meeting or set up a working committee to review the requests and make recommendations to the joint council.
5. School Council will review the various requests and approve, reject, or amend each one based on their criteria. Approvals will not be unreasonably withheld. In cases where approval is denied, Council shall provide to the Principal its reason for the decision.

## **Fund Raising Group Controls and Reporting**

6. Each group shall establish a parent group to oversee their activities.
7. Membership in the parent group overseeing the group or team activity shall be open to all those parents interested in participating and a meeting of parents shall be called as early as possible to identify those interested and to seek input.
8. All parents/students shall be informed of the planned fund raising activities and the expected costs involved as early as is reasonable.
9. Each group applying for fundraising approval shall identify a) a **teacher sponsor** and b) a responsible parent/guardian who shall act as **treasurer** and school liaison for the group.
10. The **Treasurer** shall be responsible for collecting and recording the amount of funds and from whom they were collected or by whom they were collected, turning the funds over to the school for banking, monitoring and accounting for all funds collected, requesting payment of invoices, reimbursement of expenses, etc. It is also the responsibility of the Treasurer to provide to the Principal within 30 days of the end of the project, an accounting of the funds collected and where they were spent.

(See Appendix “B” for sample form to be used.) The Treasurer will also provide parents/guardians with a copy of the report.

11. In addition to tracking and recording the sources of raised funds, by individual where appropriate, and turning it over to the school for holding, the Treasurer shall be designated as the only person authorized to request disbursements from those raised funds.
12. The Treasurer can request the school office to pay certain costs such as registration fees directly to the appropriate organization from the group’s account.
13. The Treasurer shall collect receipts and prepare expense claims and/or shall review and do the first level of approval on claims prepared by others for the reimbursement of expenses incurred on behalf of the group. The school shall issue a standard expense claim sheet to all groups so that everyone is working from the same template. (See Attached Claim form in Appendix C)
14. All expense claims that have been prepared by or approved by the appropriate Treasurer shall then be submitted to the school office for approval by the School Principal or designate.
15. If a group receives approval for a fundraising project which involves soliciting from the business community (e.g. sponsorship), the group must first obtain a letter from the school, signed by the Principal or designate, for presentation to the business certifying that this is a school sanctioned initiative.
16. Projects undertaken must be organized so as not to interfere with normal school operations.
17. Fundraising during the summer months is generally not permitted. Special requests can be considered by the Administration and by Council provided they are submitted sufficiently far in advance of the close of school in June to permit the Administration and Council to do a thorough review of the request.
18. In unusual circumstances where events come up on short notice and require a quick decision, the Principal has the option of seeking Council approval by contacting the Council Chair(s), providing the details of the request and requesting a poll of Council members by email rather than waiting until the next Council Meeting.

19. Fundraising activities shall comply with all applicable Government Laws and Regulations, School Board and CBRH policies included but not limited to: Lottery Licenses, School Nutrition Policy, etc. The Principal or designate will apply for or co-sign any permits or licenses that are required.
20. CBRH prefers fund raising activities that are service or product oriented but will consider certain other activities. There are certain fundraising activities that are not permitted which include, but are not limited to the following:
  - Sport Lottery Pools (Gambling)
  - Sale of Tickets with Alcohol as a Prize
  - Sale of Tickets on items in contradiction of existing policies  
(e.g. sale of tickets on chocolate or others items outside the food nutrition policy.)
21. Whenever possible, all funds collected or raised shall be recorded and receipted at the time of collection, along with the name of the individual or individuals who did the actual collecting or fundraising.
22. All funds collected shall be receipted at each step in the transfer process.
23. In activities where there is common participation where individual collections are difficult to measure such as a bottle blitz, the names of all individuals participating shall be recorded for future credit. In such common participation cases the funds raised shall be split equally amongst only those who participated in the group activity. In some cases, where it agreeable to the group, a suitable substitute person may replace a student/parent in the group activity where the intended person is not available with just cause. In activities where individual collections are easier to measure such as ticket sales, food item sales, etc. individual records should be kept and credits portioned to individual students based on their sales portions.
24. In order to minimize the risk of losses, all funds collected shall be deposited to the school account as soon as is practical. All funds raised must be deposited in the school bank account by the school secretary. Funds may be identified as “belonging” to a particular school group or sub-group and be used for the benefit of that group.
25. The school secretary shall issue receipts for all funds submitted by each group.
26. The school shall have an appropriate place to safeguard funds awaiting deposit at the bank.
27. The Principal is ultimately responsible for all funds collected.

## **CREDITS and REBATES for INDIVIDUAL CONTRIBUTORS**

28. When any funds are contributed to an activity on an individual basis (either cash contribution out of pocket or recycled containers' voucher), an end of project reconciliation shall be conducted to determine the eligibility of each individual contributor (on a single student basis) for a partial or full refund of the funds that he/she contributed out of pocket or from recycling of his own goods.
29. When calculating the contributions made by individuals, their share of any common fund raising activities shall be calculated and included for any common activities that they or their representative participated in. A representative can only represent one eligible student. For instance, if they participated in a common bottle blitz, their contribution should include their proportionate share of the funds raised in that blitz including the MMSB contribution. (Also refer to Clause F)
30. When applying the individually credited funds towards the costs of an approved activity, the funds raised in common fundraiser shall be the first credited towards the activity costs for each student. (See Clause K). Where a student or their representative did not participate in a common activity their portion is zero for that common activity.
31. When doing an end of event reconciliation the following process shall apply:
- A. TO CALCULATE THE COST PER STUDENT**
- A.1 the Treasurer shall total all eligible expenditures made on behalf of the student's specific team or group
- A.2 Divide that total expenditure by the total number of students who participated in the school activity.
- A.3 That quotient shall be the cost that each student is expected to contribute.
- B. TO CALCULATE THE CREDIT PER STUDENT**
- B.1** The treasurer shall calculate the credit for each individual student by:
- B.1.1 totalling the student's portioned shares from all common fundraising activities that he/she or his/her representative participated in;

B.1.2 totalling all recycling vouchers submitted by the student to be applied to the fundraising case;

B.1.3 calculating and totalling the matching MMSB contribution for the recycling vouchers that the student has provided;

B.1.4 totalling out of pocket all cash payments made directly to the cause on the individual students behalf;

B.1.5 the individual student's contribution shall be the sum of all four amounts totalled in 31.B.1.1 to 31.B.1.4.

### **C. TO CALCULATE an INDIVIDUAL SURPLUS OR DEFICIT**

C.1 If a student's credit as calculated in 31.B is greater than the cost per student calculated in 31.A the student has a surplus. If the amount of a student's credits as calculated in 31.B are less than the cost per student calculated in 31.A the student has a deficit.

C.2 Where a deficit exists, that student shall be asked to submit the amount of the deficit.

C.3 Where a surplus exists, that student may be eligible for a refund.

### **D. TO CALCULATE A STUDENT'S REFUND**

D.1 If a student's surplus is greater than \$20, he may be due a refund.

D.1.1 To calculate a potential refund, the Treasurer shall take the student's individual surplus and subtract \$20. The resulting figure is the maximum amount of a refund for which that student may qualify but under no circumstances can it exceed the sum of the amount of cash deposited to the student's credit in 31.B.1.4 plus the amounts of the recycling vouchers submitted in 31.B.1.2. Thus where a refund is due the amount of the refund shall be the lessor of 1.) the individual student's surplus minus \$20 or 2.) the sum of the amount of cash deposited to the student's credit in 31.B.1.4 plus the amounts of the recycling vouchers submitted in 31.B.1.2.

D.1.2 If a student is due a refund under 31.D.1.1, the treasurer shall arrange to have that amount returned to the student/parent.

D.1.3 Such reimbursement will only occur after the activities are completed for the year and the Treasurer has verified that all expenses have been paid and the Principal has approved the refund. The amounts raised and contributed on behalf of each student are to be tracked by the Treasurer as per Clause 10.

D.1.4 Under no circumstances shall a person get a refund of funds that were raised in the name of the school or a school group or team in any common activities such as a community bottle blitz, ticket sales, food sales, or a concert, etc

D.1.5 No student/parent shall ever qualify to receive a refund amount that shall include matching funds from the Multi-Material Stewardship Board (MMSB) on recycling.

32. Calculations of individual surpluses or deficits as outlined in Clause 31 are to be done on a group or team basis for each separate account (which amounts to each separate approved request) and is not intended to be cumulative. In other words, if a student is a member of more than one team or group, the amounts paid and owing shall be considered for each account separately and not cumulatively.
33. No person shall receive a rebate if he/she has a balance due to the school or any other school team or school group.

#### **CONTROLLING and REPORTING ON FUNDS RAISED AND EXPENDED**

34. To ensure that funds raised within the school or on behalf of the school are used in accordance with the mandate, goals and objectives of the school, the school shall know what the funds are to be used for before they are released from the bank account. The funds are intended for the use identified by the written request for approval that was submitted to the Principal and subsequently approved by the School Council.
35. The Principal shall prepare and submit to Council by June each year, a year to date report that covers all the funds raised and expended during the school year. The official report shall be included in the annual School Report to the Board and made available to School Council in October of the following school year.

#### **RECYCLING – A UNIQUE INDIVIDUAL FUNDRAISING OPPORTUNITY**

36. Recycling is a unique initiative that CBRH makes available to any individual student or group to help offset the costs associated with school sanctioned activities. Because of its unique nature, with MMSB matching funds to the School, it permits parents/students to double their recycling value.
- Groups should leave this recycling option to parents and students as a means of raising funds for their direct or personal contributions to any school activities that requires cash support from parents/students.
  - For the purposes of this policy, recycling can be used to raise funds for personal contributions to any approved activity in lieu of cash contributions or

other fund raising activities as may have been identified by the fund raising group.

- Where recycling funds are being credited to individual accounts, the matching MMSB funds shall also be credited to the individual accounts.
- The Treasurer for each group can submit Scotia Recycling/West Lane depot receipts to the office one day a month. After consulting with MMSB in September, the office will advise groups of the date to pass in receipts.

### **Limitations on Raising Funds**

37. When requesting fundraising authorization, groups are requested to limit their activities to raise only the amount actually required to meet their needs. Groups can include a reasonable allowance for contingencies in their estimates if it is felt necessary. Groups shall refrain from raising excess funds.

38. All funds to be raised are to be used for school related activities.

- In all cases where fundraising or sponsorships are intended to be used for the acquisition of material goods such as uniforms, equipment or resource materials such as books, the School Administration and Council has to approve such activities in advance and the uniforms and/or equipment shall fit the school specifications such as school colours as provided by the Administration.
- All such uniforms, equipment and resource materials shall become the property of CBRH and shall remain in the possession of the school for future years. **Personal goods, including apparel, shall not be purchased with funds raised or funds donated in the name of the School or any school group.**

### **Limitations on the Use of Raised Funds**

While CBRH recognizes the need for fundraising, there must also be guidelines/procedures as to how these funds are to be disbursed and under what conditions. In seeking public support for fundraising efforts, groups should be able to demonstrate that these funds are to be used only for essential items and not intended for items that may be considered by some as non-essential.

39. Funds raised through approved fundraising are intended to cover essential expenses only, such as but not necessarily limited to, the cost of registration fees, hotel accommodations, rental vehicles, bus charters, airfare, ferry charges, fuel, per diems for coaches and teacher sponsors to cover meals. It may also cover the cost of water for players during games.

40. Funds raised through school or publicly solicited fundraising are not normally intended to cover the cost of team meals, team parties or other team related social activities.
  
41. Funds raised through approved fundraising are not to be used for the purchase of personal apparel such as team jackets, team uniforms, track pants/suits, sports bags or other accessories. Those types of items are considered non-essential and are not to be paid for through fundraising. In the event that school funds, including raised or donated funds, are used to purchase any apparel, equipment, or accessories or if such items are donated to the school or a school team or organization, all such items shall become the property of the school and not the individual team or organization members and all the items are to be left with the school.
  
42. School groups and teams should strive to travel by the most economical, yet safe, means when using school raised funds to cover those costs. Coaches and teacher sponsors are encouraged to travel in a parent's vehicle when space is available. In those cases their share of the gas expense will be paid from team/group funds. When a teacher sponsor or coach has no choice but to use his/her own vehicle, the costs of his/her fuel will be reimbursed from group funds. When a coach or teacher sponsor opts not to travel with parents where space does exist, the teacher sponsor/coach should be entitled to receive half their fuel costs to use their own vehicle.
  
43. The rates for per diems are recommended as \$8 for breakfast, \$8 for lunch and \$14 for supper.
  
44. When using hotel accommodations, coaches/teacher sponsors shall reside at the same hotel/facility as the students.

#### **Multi-Year Fund Raising Approval**

45. For activities that normally continue from one school year to the next, such as school band travel or a specific grade level sports team or where a certain group is saving for an activity over an extended period of time, while the accounting and reporting is required annually, funds can be held in the account with the school from year to year. In such instances, written requests shall be made to the Principal

to establish a long term account with a designated purpose, a designated date of the expected use of the funds and a designated limit to the amount of funds to be held in each account. Annual fund raising activities to raise funds for those long term accounts shall be filed with the Principal each year and through him/her to the School Council for approval.

### **Forfeiture of Funds at Year End**

46. For activities that do not have approved continuity as discussed in Clause 45, all surplus funds remaining after all expenses have been paid and all eligible refunds are paid to students/parents, shall become the sole property of the school at the end of the school year. The Treasurer must certify that all relevant claims have been submitted and paid as part of his final reconciliation to the Principal. It is then at the Principal's discretion to decide how he/she wishes to reallocate those remaining funds or whether the funds will be absorbed entirely into the school's funding. (The Principal could consider creating a cash reserve account that could be used as a school group contingency account to support early expenditures such as down payments or early reservations before fundraising has had a chance to progress sufficiently or an emergency contingency against unexpected overruns by individual groups.)

### **POLICY INTERPRETATION**

47. When questions of interpretation or compliance arise, the Principal has the right of final decision on all such matters. Where the issue may require a review of this Policy, the Principal shall refer to matter back to Council for consideration but has the right to make his or her determination concerning the immediate matter if he or she chooses. In those cases, any revision or amendment to this Policy would only apply to future applications.

## Request for Fundraising Approval

Name of Group/Team: \_\_\_\_\_

Estimate of Fundraising Required (\$\$\$): \_\_\_\_\_

Funds to be used for the following (event, trip, tournament, etc.):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Fundraising Events for which you are seeking School Council Approval:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Group/Team Treasurer: \_\_\_\_\_

Submitted by: \_\_\_\_\_ Date: \_\_\_\_\_

<p><b>For office use only:</b> Discussed at School Council on _____ Date</p> <p>Decision: <input type="checkbox"/> Approved <input type="checkbox"/> Denied</p> <p>_____ Chair, School Council</p> <p>_____ School Principal</p>
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**"SAMPLE" FUNDRAISING REPORT  
INCOME AND DISBURSEMENT OF FUNDS**

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**Team/Group:** Sr. Girls Volleyball

**Treasurer:** Jane Smith

**Fundraising Event:** Bottle/Recycling Blitz

**Date Conducted:** Saturday, February 6, 2009

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<b>Description</b>	<b>Income</b>	<b>Expenses</b>	<b>Balance</b>	<b>Receipt #</b>
Bottle Blitz – Proceeds from Scotia Recycling	500.00		500.00	
Matching funds from MMSB	500.00		1,000.00	
Cheque from D & D Sales (Bottles)	500.00		1,500.00	
Cash contribution by players – 12 @ \$100.00	1,200.00		2,700.00	
Registration Fee - NLVA – Volleyfest		200.00	2,500.0	1
Travel to St. John's for Coach (see attached claim)		\$600.00	1,900.00	2
Travel to St. John's for Teacher Sponsor (see attached claim)		\$600.00	1,300.00	
Hillview Terrace Accommodations for 12 players – 4 rooms (see attached receipt).		\$1,200.00	100.00	3
4 cases of water for players during games (see attached receipt)		\$36.00	64.00	4

**APPENDIX "C"**

<b>CORNER BROOK REGIONAL HIGH</b> <b>Claim for Reimbursement of Expenses</b>
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Name of Team/Group: \_\_\_\_\_

Purpose of Travel: \_\_\_\_\_

Dates of Travel: \_\_\_\_\_

Time of Departure: \_\_\_\_\_ Time of Arrival Home: \_\_\_\_\_

Name of Claimant: \_\_\_\_\_

<b>Expenses</b>	<b>Amount</b>	<b>Receipt #</b>
Accommodations		
Rental of Vehicle(s)		
Gas		
Meals <i>(receipts not required if operating on per diem)</i>		
Marine Atlantic or Airfare Costs		
Other Expenses <i>(please specify and attach receipts):</i>		
<ul style="list-style-type: none"> <li>• _____</li> <li>• _____</li> <li>• _____</li> <li>• _____</li> </ul>		
<b>Total Claim</b>		

Submitted by: \_\_\_\_\_  
Signature of Claimant Date

Approved by: \_\_\_\_\_  
Signature of Treasurer Date

Approved by: \_\_\_\_\_  
Signature of Principal Date

<b>For Office Use Only:</b> Date Paid _____    Cheque # _____
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