



# Wilder Penfield Fundraising Guidelines

Effective as of: Feb 7th, 2011

## **1.0 OVERVIEW**

The Wilder Penfield School Community values:

- a respect for self;
- for each other;
- for our diversity and for our environment;
- striving for excellence by maximizing the potential of each individual
- promoting a commitment to life-long learning;
- the fostering of responsible citizenship;
- cooperation and a strong sense of community;
- the importance of caring;
- nurturing and a safe environment that is responsive to the needs of all.

## **2.0 PURPOSE**

The purpose of this document is to provide fundraising guidelines to Governing Board members who have a moral and legal responsibility to make decisions in the best interest of the students and to the community at large. This document also serves as a guideline to the Parent Participation Organization (PPO) and/or Home and School (H&S) members who play a valuable role in fostering their child's experience in community life and support the work of the Governing Board.

## **3.0 FUNDRAISING- A DEFINITION**

Fundraising, the organized activity of raising funds, comes from a variety of sources and is used in different ways to improve school life. The purpose of fundraising is to enhance the school's educational programs and support initiatives that are part of the *School Success Plan*. These funds are usually gathered through fundraising and donations. It's critical that all fundraising activities regardless of who initiates them follow the same process.

#### **4.0 FUNDRAISING- WHO DOES IT AND WHO DOES WHAT?**

In a school, fundraising may be carried out by one or more groups. At Wilder Penfield, historically, fundraising has been the responsibility of both the teaching staff and the PPO/H&S:

“Teaching Staff” have in the most parts concentrated their fundraising efforts to help external groups such as charitable and non-profit organizations (e.g. Quebec Heart and Stroke Fondation, Children around the world, Sun Youth, local soup kitchens, local senior citizen residences, etc.).

“PPO/H&S” have in the most parts concentrated their fundraising efforts to help the Wilder Penfield school community (e.g. raising funds for new playground equipment, to support the teacher’s wish list, to organize social events, etc.)

#### **5.0 FUNDRAISING CRITERIA**

Fundraising activities undertaken on behalf of the school must:

- be used to enhance the quality and relevance of education for students;
- be consistent with the School Success and Educational Plan;
- support School Board policies (e.g.: Food and Nutrition Policy)
- support all grades (Kindergarten, Cycle 1, Cycle 2 and Cycle 3 )
- be conducted within the school year;
- be realistic and feasible;
- use products and services of good quality, suitable for student consumption and should be provided by reputable companies;
- only be used to improve life of the student population;
- go through the proper approval process as detailed in section 7
- be transparent fiscally;
- sale of advertising space in the year book needs to be done in the best interest of the school and ensure we uphold the image of the school

Fundraising activities undertaken on behalf of the school must NOT:

- place unnecessary or excessive burden on the school community, parents or staff;
- interfere with the delivery of a school program;
- put the students lives in danger;
- exploit students;
- require door-to-door canvassing or bagging at commercial outlets;
- require students to listen to or read commercial advertising;
- require direct endorsement of products or services.

## **6.0 FUNDRAISING FOR CAPITAL PROJECTS AND RELATED ITEMS**

Fundraising for capital projects or capital-related items is permitted.

Fundraising activities for these initiatives must be conducted in consultation with the school principal prior to presentation to the Governing Board.

For consideration:

- Computers – equipment purchased must comply with the School Board’s current technical standard for information technology
- Playground Equipment – the process must comply with the School Board’s policies (Purchasing Policy, authorized vendor)

## **7.0 FUNDRAISING APPROVAL/DOCUMENTATION PROCESS**

In order to ensure that fundraising requests adhere to the school fundraising criteria:

- All fundraising activities within and outside the school community must be visible to the Governing Board and be reflected on the Wilder Penfield Fundraising Strategy document ;
- All fundraising activities provided by outside organizations, such as Home and School, must be presented for approval.
- All Fundraising activities done by the teachers need to appear on the strategy document but this doesn't require prior approval.
- Any revisions to the fundraising plan can be made only should an exceptional need arise;
- All information needs to be submitted to Governing Board for proper analysis in advance;
- Approvals need to be done during a regular Governing Board meeting;
- Approvals cannot be done via an e-mail vote to ensure complete transparency

Calendar of Approval Process:

Month of May of previous year

- Presentation of a preliminary plan of fundraising activities in the May of the preceding school year (i.e. May of 2011 for the 2011-2012 school year). Click on link [Strategy](#) to see format.

Month of October of current year

- A prioritized list of school needs (Teacher's Wish List) to provided by the end of October to ensure that current plan of fundraising activities can support the list.

Month of November of current year\*

- Presentation of revised plan of fundraising activities in November of the current school year. This should be considered the final plan and will require governing board approval. Click on link [Strategy](#) to see format.

**\*Note:** Upon approval of the fundraising plan in November, the calendar will be posted on the school's website. As the plan evolves over the course of the year, the modified plan will also be posted.

## **8.0 DONATIONS**

Through its active parent community and community contacts, the school may accept donations that:

- support the School Success and Education Plan;
- donors must be advised about the purpose and intended use of the donated funds or goods;
- do not expect advertising in return for their donation

Examples of appropriate donations include:

- o tickets to events (cultural and sports);
- o food and beverages;
- o services at events (DJ, audio visual, etc.);
- o computers, books or musical instruments (upon approval of School Principal)

## **9.0 MANAGING FUNDS**

In order to ascertain the success of an activity and to manage budgets properly, it is proposed that all:

- Teaching Staff fundraising funds be managed by the School (e.g. Help for Haiti, Help for India, Pyjama Breakfast Holiday donation) using the School's bank account, and all;
- H&S\* fundraising funds be managed by the H&S using the H&S bank account.

*\* in the case that the school does not have a H&S group but rather a PPO, in this case all funds raised will be managed by the school*

In addition:

- the parent community must be informed of the funds raised by Teacher-driven activities via the school website and that they be posted on the one page strategy document.
- the H&S & Teachers must report back to the Governing Board after all fundraising activities so we could communicate the success to the broader community.

## **10. Teacher's Wish List**

The teachers are asked to provide a prioritized list of their needs to Governing Board for the October meeting.

The list should be prioritized based on:

- the % of the student population to benefit;
- it provides improved educational opportunities;
- it provides an improvement to the general student well being.

The GB will then review the list to ensure that it fulfills the fundraising criteria.

Items that do not fulfill the criteria will not be considered. Exceptions can be made in certain circumstances, but require GB approval.

Upon consensus of the GB, the teacher's wish list will be presented to H&S. H&S will assess their fundraising needs and make the necessary adjustments to their fundraising plan.

Any new needs that are raised beyond this date will be assessed for feasibility with current funding availability or will otherwise be deferred to the next school year.

## **11. CONCLUSION**

This document serves as a guideline to fundraising and does not necessarily cover all fundraising aspects. Should a particular subject of interest not be covered in this particular document, the reader is encouraged to speak to the School Principal or the acting Governing Board Chair.

# Wilder Penfield Fundraising Strategy (Sample Only)

