



FUNDRAISING POLICY

This policy was approved by to the Governing Council on April 27, 2016.

Purpose

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

Background

Colorado public schools receive funding from the state to support their educational activities; however, state funding typically is not adequate to fully sustain the teachers in their efforts to meet the needs of their students. In most Colorado schools, as a consequence, families raise additional funds in a variety of ways to assure that legitimate pedagogical requirements are met.

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

1. By making donations to the MPCS Foundation through the Annual Give Campaign and other vehicles such as endowments and in-kind donations.
2. By paying Student Materials Fees and Field Trip costs.
3. By buying out volunteer hours.
4. By participating in all-school and individual class fundraisers.

Scope

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

1. The Annual Give Campaign
2. Large Scale Fundraising Programs
3. School-Wide Fundraisers
4. Class Fundraisers

Objectives

The objectives of MPCS fundraising are:

1. To provide financial support for the purpose of enhancing and expanding school programs, including festivals.
2. To encourage partnerships that foster better understanding of the public charter school system and public Waldorf Education within the community.
3. To create a culture of involvement, giving, and cooperation among parents, their families, community members and the school.

Relevant Fundraising Entities

The Governing Council (“Council”) is the governing body of the overall Mountain Phoenix community. The Council has overall responsibility for both the fiscal health of the school and the appropriateness of all fundraising activities associated with the school. The Council guides all other fundraising entities and activities through signing Agreement (“Agreement”), setting

school policies, and determining the priorities for how fundraising proceeds should be granted to or on behalf of the school. The Council should be made aware of any fundraising efforts so that it can plan accordingly. The Council is the final decision maker over any fundraising disputes.

The Director of Operations is the day-to-day operational authority on business matters at the school. The Director of Operations works collaboratively with all the other fundraising parties to ensure the fundraising activities operate in accordance with the Agreement and school policies.

The Director of Education is the day-to-day pedagogical authority on educational matters at the school. The Director of Education works collaboratively with all the other fundraising parties to ensure the fundraising activities operate in accordance with the Agreement and school policies.

The MPCS Foundation is an independent, all volunteer, non-profit 501(c)3 whose purpose is to financially support the vision and mission of Mountain Phoenix Community School. MPCS Foundation is the fiscal agent for fundraising activities and charitable donations on behalf of the school. MPCS Foundation works collaboratively with all the other parties to ensure financial matters of fundraisers are handled in accordance with good accounting practices for IRS tax purposes. All funds managed by the MPCS Foundation are accounted for and disbursed in accordance with the Mountain Phoenix and Foundation Agreement. Any organization or individual wishing to donate cash, materials, equipment or other property to the school should make such donations through the MPCS Foundation.

The Parent Council (PC) is the primary community building and organizing team for the school. PC works collaboratively with all other fundraising parties to ensure parent volunteers are adequately informed and engaged. PC's budget and financial activities are a part of the overall MPCS Foundation budget.

The Fundraising Committee is a standing committee of the Governing Council made up of the Director of Operations or designee, Director of Education or designee, a Council Representative, a MPCS Foundation representative, a Faculty representative, and a Parent Council member. The purpose of this committee is to develop a fundraising strategy and evaluate the appropriateness and timing of newly proposed fundraising events and activities, to ensure they do not conflict with other school activities and fundraisers. This committee reports to the GC, in order to ensure alignment between committee activities and MPCS strategic goals.

The Marketing and Communications Committee of the Council is responsible for all communication with the various elements of the school community (faculty, Parent Council, parent body, etc.) as appropriate with respect to all fundraising activities to ensure appropriate and consistent messaging. The Marketing and Communications Committee may delegate communication activities to the appropriate Parent Council committees.

Types of Fundraisers

1. Annual Giving Campaign

What is it?

The Annual Give Campaign (AGC) is the school's flagship fundraising program that obtains pledges and subsequent donations throughout the year from donors and any associated corporate matching.

Who leads it?

- MPCS Foundation leads the operation of the AGC through a designated AGC Chair and committee.
- MPCS Foundation collaborates with PC and the School Administration to obtain pledges and promote the program.

How is the money handled?

- The MPCS Foundation annual budget encompasses the AGC which is reviewed and approved by the Director of Operations and Director of Education and Council per the Mountain Phoenix and Foundation Agreement.
- The MPCS Foundation Treasurer ensures AGC expenses are reasonable and relevant

- Proceeds from AGC are unrestricted dollars that fund MPCS Foundation grants made to or on behalf of the school per the priorities of the Council.

2. Large Scale Fundraising Programs

What are they?

Large Scale Fundraising Programs are events or activities that involve not just MPCS community families but also the larger surrounding community and potentially external donors. These include but are not limited to Fun Run, Auction, major grant applications, corporate donations, capital campaigns, etc.

Who leads them?

- MPCS Foundation plans and coordinates Large Scale Fundraising Programs in collaboration with the School Directors and the Parent Council.
- MPCS Foundation designates a specific program chair and a supporting committee to lead and manage the program.

How is the money handled?

- The budget for these Programs must be included in the MPCS Foundation annual budget which is reviewed and approved by the Director of Operations, Director of Education and Council per the Mountain Phoenix and Foundation Agreement.
- The MPCS Foundation Treasurer ensures expenses are reasonable and relevant. Proceeds from Large Scale Fundraisings Programs fund MPCS Foundation grants made to or on behalf of the school per the priorities of the MPCS Governing Council.

3. School-Wide Fundraisers (Festivals and other activities)

What are they?

School-wide fundraisers are events and activities that involve the larger school community. They may be primarily intended to raise money or they could also be primarily intended to be a social or community event that may happen to have a fundraising component. School-wide fundraisers include but are not limited to festivals, Scrip, restaurant-nights, school-branded merchandise sales, and buying out volunteer hours.

Who leads them?

- The Parent Council coordinates school-wide fundraisers in collaboration with the School Directors and MPCS Foundation.
- The Parent Council designates a specific fundraising Chair who has committed to leading and managing the fundraiser to completion.
- Without 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 Marketing & Communications 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 Parent Council Treasurer and/or the Fundraising Chair must submit a budget for each school-wide fundraiser to the Director of Operations and the MPCS Foundation Treasurer at least one month prior to the date of the fundraiser event or the beginning of fundraising activities. NOTE: The MPCS Foundation-Parent Council annual budget already includes the budget for recurring events and activities.
- The Director of Operations may waive the need for submitting a budget in advance depending on the scale of the event.
- The Parent Council Treasurer ensures expenses are reasonable and relevant.

- The Parent Council Treasurer or the Fundraising Chair must provide a close out financial statement to the Director of Operations and the MPCPS Foundation Treasurer detailing the resulting revenue, cost and net income of all funds.
- All proceeds from school-wide fundraisers are unrestricted funds that contribute to MCPS Foundation grants made to or on behalf of the school per the priorities of the MPCPS Governing Council, unless otherwise stated (i.e. Winter Market class specific fundraisers).
- Proceeds are defined as the total revenue generated by the fundraiser less the total direct costs of putting on the fundraiser.
- MPCPS Foundation budgets an annual contribution to make to each class account.

4. 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 Directors, MPCPS Foundation, and Parent Council as needed to operate the class fundraiser.
- The Class Teacher ensures the Parent Council and the Foundation is notified of any Class Fundraising events/activities.
- For new class fundraisers, 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 MPCPS Foundation.
- The Class Teacher ensures expenditures of fundraiser proceeds are reasonable and relevant.
- Proceeds from Class Fundraisers must be deposited into Class Accounts held by the Foundation.
- Funds raised generally are used to support class events, field trips, and other classroom needs.
- Funds raised can be used to support class events, field trips, as well as materials to support learning.
- 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 it is approved by the designated parties as stipulated in the Approval Process. A fundraiser may not be implemented until it has been approved by this process.

1. A Fundraising Request Form is submitted to the Fundraising Committee for consideration.

2. The Fundraising Committee asks four 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 Give Campaign? In other words, is it likely that this event/activity will negatively impact the results of the AGC?
- Does the proposed event/activity conflict with any other event/activity already on the School's Master Calendar?
- Does the timing of the event/activity occur immediately following another fundraising effort, leaving families feeling bombarded with requests for money?

3. If the answer to ALL four questions is "No", then the committee shall accept the proposal request. If the answer to any of these four questions is "Yes" according to a 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 four stated requirements. If the proposal is accepted by the Fundraising Committee, it is submitted to the Director of Operations for financial and liability review.

4. In the case of a Class Fundraiser, the Director of Operations and/or Director of Education make the final decision. The Director notifies the Fundraising Chair of the decision including any reasons or suggestions for changes if the request is denied. When a Class Fundraiser is approved, the Fundraising Chair must notify the steward of the Master Calendar, Class Teacher and Class Rep (Parent Council).

5. In the case of a School-Wide fundraiser, the Parent Council 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 school-wide fundraisers, in partnership with the Governing Council. The Fundraising Committee notifies the Governing Council, the Director of Operations, the Director of Education and Parent Council of the decision including any reasons or suggestions for changes if the request is denied. When a School-Wide fundraiser is approved, the Fundraising Chair must notify the steward of the Master Calendar.

6. The Fundraising Committee reserves the right to revisit any approved fundraiser in the event any issues develop 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 steward of the master calendar (designated admin staff) 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 Council establishes the dates in collaboration with the School Administration before the start of the school year.

Off-Site Fundraisers

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

Ongoing or repeated off-site fundraisers (car washes for example) need only be approved one time by the Fundraising Committee.

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 Governing Council 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 Governing Council, 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 manner 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, grades PK – 3, 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 Governing Council.
- 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 standard accounting and operational practices published by MPCS Foundation.
- 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 Director of Operations. The Director of Operations will engage the MPCS Foundation Treasurer and Governing Council as needed to investigate and address.

POLICY HISTORY

Original proposal: March 30, 2016.

Approved: April 27, 2016.