



## FUNDRAISING POLICY

***This policy was approved by the Governing Council on February 26, 2020.***

### **Purpose**

This policy sets forth guidelines and direction related to fundraising. This policy is designed to accompany the policy on Classroom Accounts.

### **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 six types of fundraisers (specific examples of each fundraiser type are listed in the **Types of Fundraisers** section later in this policy) :

1. The Annual Give Campaign
2. Large Scale Fundraising Programs
3. School-Wide Fundraisers
4. Class Fundraisers
5. Non-Monetary Donations and/or Fundraisers that Benefit Other Organizations
6. Businesses Offering Proceeds from Referrals/Sales Back to the School

### **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 a 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 the Agreement between the MPCS GC and Foundation (“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 Enrichment and Student Support** is the day-to-day operational authority on business matters at the school. The Director of Enrichment and Student Support 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 Foundation made up of the Director of Enrichment and Student Support or designee, Director of Education or designee, a Governing Council Representative, a MPCS Foundation representative, a Faculty representative, a member of the Non-Instructional Staff (who can represent marketing and volunteer requirements), 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 Foundation, which will communicate any updates in its monthly report to the GC, in order to ensure alignment between committee activities and MPCS strategic goals.

## **Types of Fundraisers**

### **1. Annual Give 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 the School Directors, operational staff and faculty 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 School Directors and Governing 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 Governing 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, operational staff and faculty..
- 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 School Directors and Governing Council per the Mountain Phoenix and Foundation Agreement.
- The MPCS Foundation Treasurer ensures expenses are reasonable and relevant.
- Proceeds from Large Scale Fundraising Programs are unrestricted dollars that fund MPCS Foundation grants made to or on behalf of the school per the priorities of the Governing Council.

## **3. School-Wide Fundraisers**

### *What are they?*

School-wide fundraisers are events and activities that are delegated by the Fundraising Committee and 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, seasonal markets,, book fairs, restaurant-nights, school-branded merchandise sales, and a percentage of purchases from vendors or stores.)

### *Who leads them?*

- The Fundraising Committee coordinates school-wide fundraisers in collaboration with the School Directors and MPCS Foundation.
- For existing school-wide fundraisers (e.g., Winter Market), the sponsoring group (Parent Council or a classroom) will designate a specific Fundraiser Chair who has committed to leading and managing the fundraiser to completion.
- The Chair may also form a supporting committee.
- For new school-wide fundraisers, the sponsoring group or Chair must obtain authorization to proceed through the Fundraiser Approval Process detailed below at least one month in advance of the activity.

### *How is the money handled?*

- The group sponsoring the fundraiser (e.g., Parent Council, music department) is responsible for creating a budget for the fundraiser, including any upfront expenses for supplies, rentals, inventory, etc. to ensure the expenditures are reasonable and relevant. Any upfront costs must come from existing funds (e.g., a classroom account) and approved by the Fundraising Committee. NOTE: The MPCS Foundation-Parent Council annual budget already includes the budget for recurring events and activities. At the end of the fundraiser, the Chair provides the Fundraising Committee with a report detailing the resulting revenue, cost and net income of all funds.
- Proceeds from the fundraiser must be deposited into the appropriate account held by the Foundation. Proceeds are defined as the total revenue generated by the fundraiser less the total direct costs of putting on the fundraiser.

## **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 sponsors the fundraiser and designates a specific Class Fundraiser Chair.
- The Class Fundraiser Chair works in collaboration with the School Directors, operational staff and faculty, and the MPCFS Foundation, and Parent Council as needed to operate the class fundraiser.
- 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 MPCFS 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 are used to support class events, seasonal celebrations, field trips, and other classroom needs such as materials to support learning and class projects
- 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.

## **5. Non-Monetary Donations and/or Fundraisers that Benefit Other Organizations**

Fundraisers that benefit organizations/entities other than MPCFS must go through the Fundraising Committee approval process to ensure the organization aligns with MPCFS mission, vision and values and is not overlapping other fundraising efforts. Similarly, requests to gather non-monetary donations (either for our community or for outside organizations), such as a clothing or food drive, must go through the Fundraising Committee approval process.

## **6. Businesses Offering Proceeds from Referrals/Sales Back to the School**

Community members that own a business and would like to give a portion of proceeds back to MPCFS do not need to submit a Fundraising Request for approval. Although MPCFS will not advertise individual business promotions in the Weekly Reporter, the business can promote within the MPCFS community by:

- Determining the promotion or give back, for example 10% from all referrals from MPCFS families or 20% of all sales during the first week of September, etc.
- Adding/Updating the business listing to the MPCFS Business Directory. The directory is promoted a few times throughout the year in the Weekly Reporter.
- Posting a flyer on the community bulletin board next to the kitchen in the Main Office Building (flyer must be approved by school administration).
- Posting on the Phoenix Families Facebook Group (a parent-led FB group for current MPCFS families). One business posting is allowed per month.
- Posting on the MPCFS Buy/Sale/Trade Facebook Group. No limit on posting frequency.

## **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 or volunteer time?

3. If the answer to ALL four questions is "No", then the committee shall review 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,ask that it be reworked so that it no longer violates any of the four stated requirements, or the committ.

4. In the case of a Class or School-Wide fundraiser, the sponsoring group, classroom parent, community member 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 Foundation. The Fundraising Committee notifies the Governing Council, the School Directors and Parent Council of the decision including any reasons or suggestions for changes if the request is denied.

5. 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.

6. Once a fundraiser has been approved, the Fundraiser Chair schedules a meeting with the Marketing Communications & Volunteer Coordinator to get the event added to the school master calendar and to discuss volunteer and promotion needs and timeframes.

7 After the fundraiser is over, the Fundraiser Chair submits a summary of the event and transfer of knowledge to the Fundraiser Committee.

### **Master Calendar**

The School Administration will keep a master calendar for all fundraising events. No approvals will take place without first consulting the calendar for conflicts or closed periods (see approval process above). For recurring events, the Foundation and 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 if necessary 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.
- 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 MPCF 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 Fundraising Committee who will engage the School Directors, Foundation Treasurer and Governing Council as needed to investigate and address.

#### POLICY HISTORY

Original proposal: March 30, 2016.

Approved: April 27, 2016.

Revised July 14, 2019 to change "Director of Operations" to "Director of Enrichment and Student Support".

Revised January 2020 to change the committee from GC to Foundation, to add more clarity to the School-Wide Fundraisers section, and to add both the "Non-Monetary Donations and/or Fundraisers that Benefit Other Organizations" and "Businesses Offering Proceeds from Referrals/Sales Back to the School" sections.

Approved by the Governing Council on February 26, 2020.