

## 1. Purpose:

To provide procedures and guidelines to parents, staff, and all who engage in fundraising activities designed to support a local school or board initiative.

It is recognized that fundraising activities have the potential to enrich the experience of students, as well as help to build a broader sense of community outside of school hours. To that end, a clear and transparent process for raising and spending funds shall be in place.

When the Board and its schools choose to engage in fundraising activities it is important to ensure that they:

- a) comply with school board policies and conduct activities which are consistent with the purposes and principles of public education;
- b) seek advice from the school community; and,
- c) support and protect staff and volunteers from legal liability through practices that promote accountability for the handling and management of the proceeds raised from these activities.

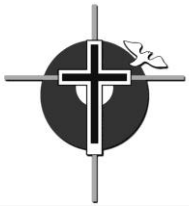
## 2. Definitions

### 2.1 School-Generated Funds

School-Generated Funds are funds that are raised and collected in the school, or broader community, in the name of the school, by Catholic school councils or other school or parent administered groups. These funds are administered by the school principal, and are raised or collected from sources other than the school board's operating and capital budgets. School-Generated Funds is a broad category which includes not only fundraising for school purposes, but also all funds that are collected and paid out through school bank accounts to support a variety of programs such as payments to charities or other third parties (e.g. tour operators, and hot lunch programs).

### 2.2 Fundraising

Fundraising is any activity permitted under a school board's policy, to raise money or other resources, as approved by the school principal in consultation with, and upon the advice of, the Catholic school council and/or a school fundraising organization operating in the name of the school, and for which the school provides the administrative processes for collection. Such activities may take place on or off school property.



### **2.3 School Community**

The school community refers to students, parents, guardians, Catholic school councils, trustees, school administrators, staff, members of the broader community and partners, as well as others who support the local school and student achievement.

## **3. Guiding Principles**

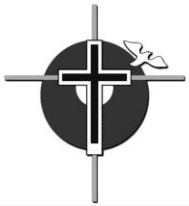
Catholic District School Board of Eastern Ontario's fundraising policy and administrative procedures are designed to ensure consistency and transparency in the collection and distribution of funds. The following principles are to be used to guide all decisions concerning fundraising.

### **3.1 Complementary to Publicly Funded Education**

- a) Funds raised for school purposes are used to complement, not replace, public funding for education.
- b) The purposes for which funds are collected must be consistent with the Catholic District School Board of Eastern Ontario's mission and values.
- c) Activities must support student achievement and not detract from the learning environment.

### **3.2 Voluntary**

- a) Participation in fundraising activities is strictly voluntary. No individuals should feel compelled to participate in any fundraising activity, nor should they be subject to penalties, or be denied any benefits, if they choose not to participate.
- b) The school community is welcome to participate in fundraising activities. These activities should reflect the diversity, values and priorities of the local school community.
- c) Privacy must be respected. The personal information of staff, students or other individuals shall not be shared for the purposes of fundraising without prior consent. (The use of personal information by school boards is governed by the *Municipal Freedom of Information and Protection of Privacy Act*.)



### **3.3 Safety**

- a) The safety of students is a primary consideration in all fundraising activities.
- b) Student fundraising activities require supervision and should be age-appropriate.
- c) Appropriate safeguards must be in place regarding collection, deposit, recording, and use of public funds.

### **3.4 Accountable & Transparent**

- a) All fundraising activities taken on by Catholic school communities will adhere to the Catholic District School Board of Eastern Ontario policy and administrative procedure for fundraising, and follow the Board's School-Generated Funds Guidelines which outlines the use of fundraising proceeds and accounting for school-generated funds. The policy is publicly available on the school board's website.
- b) Fundraising activities are developed and organized with advice and assistance from the school community, including students, staff, parents, and community organizations.
- c) Fundraising activities may not result in any person, including school board staff or volunteers, benefiting materially or financially from the activity.
- d) Fundraising has a designated purpose and the proceeds must be used for that purpose.
- e) Transparent financial reporting practices to the school community must be in place.

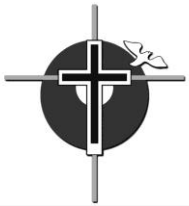
## **4. Responsibility**

School Principals, in consultation with their superintendents, are responsible for ensuring compliance with the fundraising administrative procedure.

## **5. Procedures**

School Principals will:

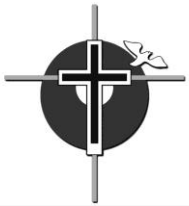
- 5.1** approve all fundraising proposals submitted by individuals or groups within the Catholic school community;



- 5.2 ensure that the purposes for which the funds are collected are consistent with the Catholic District School Board of Eastern Ontario's mission and values;
- 5.3 ensure that processes outlined in Board procedure C1:6 School Generated Funds are followed in the collection, disbursement, reporting and overall administration of the funds;
- 5.4 identify to the Catholic school community the purpose of all fundraising activities before beginning such activities;
- 5.5 inform the Catholic school community as to how the proceeds from all fundraising activities, fees and corporate donations are to be used;
- 5.6 determine the best method for communicating with the Catholic school community (e.g. newsletter, posting to school website):
  - plans for fundraising activities and,
  - plans for the disbursement of proceeds;
- 5.7 ensure compliance with board policies, and municipal and federal laws and regulations;
- 5.8 ensure that all students benefit from the proceeds of fundraising; and
- 5.9 communicate with the students, staff, parents and the broader Catholic school community that participation in fundraising activities is voluntary.
- 5.10 **Corporate Sponsorships and Major Fundraisers:**

Corporate Sponsorships and Major fundraisers may be undertaken by the school community. A business plan must be developed by the school and submitted to Executive Council via the school Superintendent for approval. A Fundraising Committee may be formed that may include community members, school and Board staff and School Trustee.

- 5.10.1 Should the school wish to contact businesses and organizations, the following process should be followed:
  - a) Fundraising Committee meet and establish a list of potential businesses that are being considered;
  - b) List is submitted to school Superintendent;

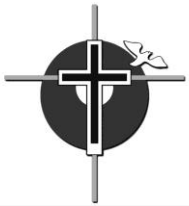


- c) Executive Council completes a cursory review to ensure each organization is compliant with the following:
  - Municipal, Provincial, Federal Legislation
  - School Food & Beverage Policy
  - Equity and Inclusive Strategy
  - Facility Partner Guidelines
  - Teachings/beliefs of the Catholic Church
  - Vision & Mission of the Catholic District School Board of Eastern Ontario ;
- d) Executive Council will approve these organizations that are compliant with items in c). The school Fundraising Committee will be informed that they can proceed with approach. No organization shall be approached until confirmation has been received from Executive Council; and
- e) The Board will be informed of any organization that is non-compliant with items in c)

### **5.10.2 Permanent Signage (Corporate Sponsors/Major Fundraising)**

Should a school involved in a major fundraising campaign wish to offer sponsor organizations signage as recognition for their contribution, the following process will be followed:

- a) The School Fundraising Committee will submit to the school Superintendent a proposal for permanent signage. The school Superintendent will bring the proposal forward to Executive Council for review. It will be brought to Board for approval;
- b) Proposals must include details of proposed signage including:
  - Location
  - Size
  - Design
  - Which organizations will be included;
- c) Those organizations that are receiving recognition for permanent signage will be required to sign an agreement that will outline:
  - Expectations – size, colour, etc.



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- Length of time – of agreement
  - Reasons that may cause removal of sign; and
- d) All signage must be approved by Board before being erected on site.

### 6. Receipts for Income Tax Purposes:

Requests for official charitable receipts/sponsorship letters will be provided based on level of donation and any advertising provided (i.e. permanent signage).

### 7. Reference Documents

Appendix 1: Examples of Acceptable and Unacceptable Uses of Fundraising  
(Fundraising Guidelines, Ministry of Education Memorandum 2012: B10. May 4, 2012)

## Appendix 1

### Fundraising Guideline

The Province provides capital funding for the construction of new schools and additions, for repairs and renovations, and for the operation and maintenance of schools, including heating, lighting and cleaning. Funds raised for school purposes are to be used to complement, not replace, public funding for education. (For additional information on education funding, please see <http://www.edu.clov.on.ca/enci/parents/fundino/index.html>).

Capital projects supported by fundraising proceeds should:

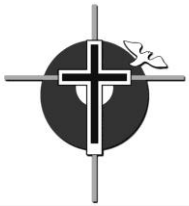
- be complementary to publicly funded education;
- not result in an increase in the student capacity of a school; and
- not result in a significant increase in school or board's operating or capital costs.

Fundraising activities must be compliant with:

- Municipal, provincial, and federal legislation; and
- Ministry of Education guidelines and policies, such as the School Food and Beverage Policy, Equity and Inclusive Education Strategy, Facility Partnerships Guideline and the Broader Public Sector Procurement Directive.

### Examples of Unacceptable Uses of Fundraising Proceeds

- Items funded through provincial grants such as classroom learning materials and textbooks.
- Facility renewal, maintenance, or upgrades funded through provincial grants such as structural repairs, sanitation, emergency repairs, or replacing flooring due to wear and tear.
- Infrastructure improvements which increase the student capacity of a school or are funded by provincial grants (for example, classrooms, additions, gyms, labs).
- Goods or services for employees, where such purchases would contravene the *Education Act* or a Catholic school council's by-laws regarding conflict of interest.
- Professional development including support for teacher attendance at professional development activities.
- Administrative expenses not associated with fundraising activity. Any administrative expenses associated with fundraising activity should be minimized.
- Support for partisan political activity, groups or candidates.



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### **Examples of Acceptable Uses of Fundraising Proceeds**

- Assistance fund (for example, a fund serving a charitable purpose to benefit students, such as providing payment for the cost of a field trip for students who cannot afford it)
- Supplies, equipment or services which complement items funded by provincial grants (for example, extracurricular band equipment, audio-visual equipment)
- Field trips or other excursions (for example, in-province, out-of-province, or trips abroad)
- Guest speakers or presentations
- Ceremonies, awards, plaques, trophies or prizes for students
- Scholarships or bursaries
- Extracurricular activities and events (for example, travel and entry fees for sports competitions, school team uniforms, school band, choir, clubs)
- School yard improvement projects (for example, playground equipment, shade structures, gardens, outdoor skating rink)
- Upgrades to sporting facilities such as running tracks, installation of artificial turf and scoreboards
- Support for activities that are unique to the denominational or cultural character of the school (for example, student retreats).