

Administrative Procedure AP 520

COORDINATION OF FUNDRAISING ACTIVITIES WITH PARENT ADVISORY COUNCILS (PACS)

BACKGROUND

New Westminster School District believes school/student fundraising can contribute to the advancement of education. Further, the District wishes to foster cooperative relationships with Parent Advisory Councils (PACs) to serve the best interests of students. School operations and PAC activities are dynamic and ongoing liaison is appropriate. To that end, the following procedures provide direction to principals on practices to utilize where a PAC chooses to raise funds to support school services.

SCOPE

These procedures apply to all fundraising for curricular and extra-curricular activities conducted through schools or in the name of schools whether or not students are involved. These procedures do NOT apply to fundraising conducted by a Parents' Advisory Council in its own name unless students are involved. PACs can operate fundraising events and are accountable to their members and financial supporters. The PAC is responsible for the administration of the funds it raises (including gaming grants) pursuant to its constitution and bylaws, legislation and commitments to donors.

PROCEDURES

PLANNING FOR A FUNDRAISING ACTIVITY

1. School Principals have the primary responsibility to approve all fundraising done in the name of the school or for the benefit of the students at the school.
2. Where the PAC has expressed an interest in raising funds, the PAC will engage with the school principal to discuss opportunities for financial support in a collaborative manner. The opportunities presented by the PAC for fundraising must be comprehensive and consistent with existing school programs.
3. Before a PAC fundraising activity can involve students, school facilities, school communication systems, or be sanctioned for schools' protection program insurance coverage, the school principal is responsible to ensure that:
 - i. Student involvement is safe and appropriate;
 - ii. Values which the public will confer on the school from the activity are acceptable;
 - iii. Purposes of the PAC fundraising is acceptable and clearly identified;

- iv. They have consulted with the appropriate District department/contact should equipment or technology be desired from fundraising prior to commencing fundraising activities (For equipment donations refer to Administrative Procedure 522 – Charitable Donations);
 - v. Considerations have been made for the need for additional insurance, maintenance (custodial, building security and access), and relevant licenses or permit requirements;
 - vi. Each fundraising activity or set of common activities be separately accounted for pursuant to district standards;
 - vii. Those involved in fundraising are to be informed how funds were expended;
 - viii. Financial controls appropriate for publicly raised funds are to be established in the event cash is being collected;
 - ix. Coordination of fundraising is congruent with school use schedules; and
 - x. Any student accidents or illness will be reported (Administrative Procedure 315 – Student Incidents and Sickness) and any accidents of members of the public reported to the District school board office for awareness.
4. If the fundraising activity involves commercially oriented activities (ex. Sale of shirts or hoodies), before proceeding, the Principal should evaluate vendors, products, service and commercial terms. Potential purchasers should be informed that:
 - i. The school district does not warrant or guarantee products, services or vendor performance.
 - ii. The product or service is not endorsed to parents as a part of their child's education program.
 - iii. The sale is being solicited to realize benefits and indicate how the benefit will be utilized.
5. The school principal is the PACs contact for the expenditure of PAC funds to support school operations. Funds may be expended by:
 - i. Contributing funds to the school for either defined purposes or discretionary flexibility. Funds received from PACs for the purchase of goods and services by the school via the school principal shall follow Administrative Procedure 515 – Purchasing and Tendering.
 - ii. Purchasing goods, services or equipment and contributing them to the school, subject to procedures below relating to Site Improvements and Administrative Procedure 522 – Charitable Donations (see section under equipment donations).
 - iii. Contributing funds to the board to fund larger expenditures for the school.
6. Funds raised are to be expended for the purpose for which they were raised. The identification of the purpose must precede the commencement of fundraising activities or collection of contributions and should be approved by the Principal.
7. The PAC shall report to the school community the amount of funds raised and the purposes for which they were expended. This report may take the form of minutes, newsletter or a statement listing gross receipts and expenditures.

SITE IMPROVEMENTS

Site improvements are activities that physically improve a site and can be new, additional or replacement items. These are separate from building improvements and include such items as playground equipment, specialty lighting, outdoor basketball courts and backstops, community gardens, and other such amenities that would exceed \$500 in cost. In general, site improvements are not provided from the District's maintenance operating budgets.

8. Site improvements which are financially supported by the PAC may only be constructed on school district property under the control and direction of the secretary-treasurer in order to ensure district standards. The prime concern with respect to site improvements is that they are of such a design and quality that they provide safe recreation and physical activity for children.
 - i. Where appropriate, all equipment and materials must be CSA approved. The materials will be durable, require minimal maintenance and be fabricated of materials which will not splinter, become abrasive or deteriorate through normal use.
 - ii. All equipment and materials installed on district premises must meet the manufacturer's installation standards, and any other standards established by the school district.

FUNDS COLLECTED BY AND HELD IN SCHOOLS

9. Refund of Parent Contribution
Fees charged or funds raised for events, trips, or services provided are expected to achieve little surplus or "profit" beyond the costs involved. Where a combination of fundraising and parent contributions exceeds the financial requirement of a function, organizers, in consultation with the school principal, shall determine how surplus funds are to be treated:
 - i. Retained by the school for application to other similar student activities consistent with the general intent of the funds collected or,
 - ii. Refunds provided to parents to the maximum of their cash contributions.
10. Refund of Public Contribution
Contributions from the public are non-refundable. Where public fundraising exceeds the financial requirements of a particular project, the balance of funds remaining are to be utilized for a similar project or for a similar group of students.
 - i. Fundraising organizers shall consult with the School Principal to have a plan approved for these surplus funds, inclusive of a timeline for expenditure.
11. Funds raised are to be directed to the benefit of students and are not to be accumulated other than for specific projects as supported by approved plans or budgets.
 - i. For recurring events, to minimize the unplanned accumulation of funds, PACs/organizers will utilize budgets to inform the maximum required carryover amount. The budget will also include plans for profits should any be generated from an event where revenues exceed costs. Where balances exceed the maximum required carry over balance, PACs/organizers should refer to 10 above.

12. In situations where amounts collected and held by schools for events require fundraising or collection of contributions beyond one year, such as for recurring events or major trips, amounts may be carried over beyond the district's fiscal year end upon approval by the school principal. Should these balances exceed \$2,500, the principal shall retain documentation of the rationale for carryover which will include an approved budget and/or expenditure plan for these unspent amounts in a future year upon working with the school PAC.
13. The Secretary-Treasurer will be notified by the school principal of fundraised balances in school accounts that are unspent in the year exceeding \$10,000 and shall be advised as to the rationale or plan for expenditure.
14. Principals may be requested to provide the PACs with periodic reports on school usage of funds provided by the PAC.

Reference: Sections 8, 8.4, 8.5, 20, 22, 23, 65, 85 School Act

SD No. 40 (New Westminister)

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