



SCHOOL FUNDRAISING, SPONSORSHIP AND DONATIONS POLICY

REVISION
DATE

1.0
10 March 2016

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1. Purpose

Mount Lawley Primary School (MLPS) conducts fundraising activities and receive sponsorship or donations, while the Parents & Citizens Association (P&C) conducts fundraising and receives donations. These enable important additional resources to be purchased for the School and provide opportunities for the school community to contribute to the School while also mixing socially.

Because MLPS and P&C are independent bodies two separate but aligned Fundraising, Sponsorship and Donation policies are needed:

- This document which is the School Fundraising, Sponsorship and Donations Policy; and
- The P&C Fundraising and Donations Policy which covers all fundraising and donations undertaken by the P&C (provided in Appendix).

Both policies are consistent with the objectives of MLPS and relevant Department of Education guidelines. They also seek to ensure that activities are planned, that all proceeds are appropriately accounted for and that the financial impact on families is considered in any decisions to raise funds.

The MLPS School Council is not permitted to obtain funds for the school.

2. Definitions

Sponsorship is the purchase of the right to associate a Sponsor's name, products or services with a School in return for negotiated benefits. Sponsorship is an arrangement providing for a distinct two-way return of benefits. The benefits may be in financial (cash) or non-financial (in-kind) and will be subject to GST. A sponsorship agreement must be entered into for all sponsorships.

Donation or Gift is a gratuitous transfer of money, goods or services to a school that places no obligation on the School to provide anything in return to the donor. The school may choose to acknowledge the gift in an appropriate manner. The school is not required to enter into an Agreement to accept a donation or gift.

For example, a local business donates a student prize and does not expect the School to acknowledge the donation. No agreement is required for donations and they are not subject to GST.

Fundraising is a deliberate strategy to raise funds which can then be given to the school to purchase specific resources needed.

The P&C undertakes fundraising for the school and is bound by their own fundraising policy¹ that aligns with this policy. Others can fundraise after ensuring alignment with the policy principles below, and after seeking permission from the School Finance Committee to ensure no GST transactions arise.

Note: Only the School can enter into sponsorship agreements; both the school and the P&C can organize fundraising or accept donations and gifts.

3. Scope

This policy applies to all donations, sponsorships and fundraising activities conducted on behalf of MLPS (excluding P&C).

For the purposes of this policy, 'fundraising' includes activities that encourage the raising of money or other resources for MLPS.

Examples of fundraising by MLPS covered by this policy include:

- Fundraising for a specific purpose (e.g. extended excursion, competitions and sport trips);
- Fundraising for a specific charity;
- Fundraising through the sale of commercial goods;
- Fundraising through the provision to MLPS of receipts, vouchers and coupons obtained by community members through commercial transactions enabling the School to redeem those receipts, vouchers and coupons for value (e.g. the Coles and Woolworths programmes).

For the purposes of this policy, fundraising does not include:

- The standard voluntary school contributions;
- Voluntary P&C contributions;
- Transactions of a wholly commercial nature where full value is provided on each side of the transaction;
- Activities where members of the school community, acting as individuals rather than on behalf of MLPS, raise funds on behalf of outside bodies (e.g. by selling raffle tickets to support a charity).

4. Policy Principles

1. The School should only engage in sponsorship, receiving donations or fundraising activities where the funding will help achieve one or all of the following outcomes:
 - Supports the School's goals, values and objectives;
 - Increases the effectiveness of the School's programs;
 - Improves student outcomes and learning;
 - Communicates key messages to target audiences; and/or
 - Enhances the School's public image and reputation (and those of public education).
2. Fundraising should always be for a specific purpose that is clear and understandable to those who are being asked to contribute.
3. Participation in and contributing to fundraising activities is voluntary. While all families are encouraged to support fundraising activities, the right of each school family to determine the level of financial support that they can offer should be respected.

4. Fundraising for planned events such as camps, excursions etc. must have the prior approval of the School's Finance Committee. Approval from the Committee is required to ensure no GST transactions arise.
5. The timing of fundraising activities should be approved by the Principal to ensure that one project does not detract from another and to ensure that fundraising does not present an ongoing demand on the school community.
6. The School Council approval must be obtained with respect to any agreement or arrangement for advertising and sponsorship in relation to MLPS.
7. The School recognises that it has responsibility for all monies collected in its name (this excludes P&C specific fundraising), and therefore, must be able to produce documentation suitable for audit.

To meet financial auditing requirements:

- a. Any person or group proposing to conduct a fundraising event should outline the project in writing to the Principal so that a process of accountability, including money collection and receipting, can be agreed on before the activity occurs.
 - b. As soon as possible following the fundraising event, the amount raised is to be brought formally to the attention of the Finance Committee and minuted.
 - c. All income and expenses associated with fundraising must be documented.
8. The Principal must determine that the fundraising, sponsorship or donations are for a proper purpose. (*Sponsorship has specific limitations cited in Department of Education Regulations 51, 52 and 53.*)

Sponsorship, donations and fundraising activities:

- Must not adversely affect, or be likely to adversely affect, the safety, health, welfare or best interests of students at the School;
- Must not require the School, School staff, School students or Department to endorse, recommend or promote any goods or services;
- Must not require display of brand names or logos on official school uniform;
- Must not provide for any student to participate in an activity unless the student chooses to do so;
- Must not restrict competition or require or lead to the exclusive supply by the provider of goods or services to the School;
- Must not promote nor enable the distribution of goods or services to the School, School staff or School students if the consumption of the good or service is likely to conflict with the ethos and values of the School or otherwise adversely affect the School's reputation;
- Must not enable the distribution to students of material promoting or endorsing any particular denomination, sect or political party;
- Must not provide for the right to name the School or an educational program of the School;

- Sponsorship may provide for the right to name a facility at the School including a building or an oval; a School activity including a concert, sporting event, carnival or competition; or a prize, scholarship or award to be given to a student or a member of staff of the School;
- Any teaching materials provided through Sponsorship must not be used at the School unless they are clearly identified as being provided under the Sponsorship.

5. Responsibilities

Principal

The Principal is responsible for:

- Ensuring that all agreements or arrangements for advertising or sponsorship are approved by the MLPS School Council and follow the Department of Education process;
- Advising those wishing to conduct fundraising projects of the accountability requirements;
- Approving the scheduling of fundraising activities to avoid negative outcomes;
- Approving fundraising activities before they occur (other than P&C activities);
- Accounting for all monies raised in a manner that will meet the School's auditing requirements; and
- Maintaining records that show when fundraising activities have occurred and how much money has been raised by each activity

Coordinators of Fundraising Projects

Those coordinating fundraising projects are responsible for:

- Seeking prior approval for activities per this Policy;
- Discussing accountability requirements with the Principal before activities commence;
- Documenting receipts and expenses;
- Providing a final report regarding funds raised to the Principal at the completion of the activity; and
- Complying with this policy, Department of Education regulations, and relevant state laws e.g. conducting lotteries/raffles.

School Council

School Council is responsible for:

- deciding whether or not to approve any agreement or arrangement for advertising or sponsorship in relation to MLPS (as per the Department of Education defined functions of a School Council, Education Act 1999 section 216 (5)).

6. References

Department of Education: Incoming Sponsorship to Schools Policy

<http://det.wa.edu.au/intranet/ccm/detcms/navigation/category.jsp?categoryID=10573013>

The policy is based on the requirements of the *School Education Act 1999* and *School Education Regulations 2000*

7. Appendix One – P&C Fundraising and Donations Policy



PARENT & CITIZENS ASSOCIATION FUNDRAISING AND DONATIONS POLICY

REVISION 1.0
DATE

3 December 2015

DOCUMENT HISTORY

Date	REV	Approved
3 Dec 2015	0.1	Neil Brodie suggested edits
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Revision Details

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0.1	Preliminary draft for comment.
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1. Purpose

Mount Lawley Primary School (MLPS) conducts fundraising activities and receive sponsorship or donations, while the Parents & Citizens Association (P&C) conducts fundraising and receives donations. These enable important additional resources to be purchased for the School and provide opportunities for the school community to contribute to the School while also mixing socially.

Because MLPS and P&C are independent bodies two separate but aligned Fundraising, Sponsorship and Donation policies are needed:

- School Fundraising, Sponsorship and Donations Policy; and
- This document which is the P&C Fundraising and Donations Policy covering all fundraising and donations undertaken by the P&C (P&C cannot enter into sponsorships).

Both policies are consistent with the objectives of MLPS and relevant Department of Education guidelines. They also seek to ensure that activities are planned, that all proceeds are appropriately accounted for and that the financial impact on families is considered in any decisions to raise funds.

The MLPS School Council is not permitted to obtain funds for the school.

2. Definitions

Sponsorship is the purchase of the right to associate a Sponsor's name, products or services with the School in return for negotiated benefits. P&C is not permitted to enter into sponsorship and all such requests should be directed to the School.

Donation or Gift is a gratuitous transfer of money, goods or services that places no obligation on the P&C to provide anything in return to the donor. The P&C may choose to acknowledge the gift in an appropriate manner. It is not required to enter into an Agreement to accept a donation or gift.

For example a local business donates a student prize and does not expect the P&C to acknowledge the donation. No agreement is required for donations and they are not subject to GST.

Fundraising is a deliberate strategy to raise funds which can either be given to the School, or used by the P&C, to purchase resources needed by the School.

The School may also undertake fundraising however is bound by their own fundraising policy¹ that aligns with this policy. Others can fundraise after seeking permission from the School Finance Committee.

Note: Only the School can enter into sponsorship agreements; both the School and the P&C can organize fundraising or accept donations and gifts.

¹ As an affiliate of the Western Australian Council of State School Organizations (WACSSO) it is important that the P&C retains its own policy as it is independent from the School and is not governed by its policies.

3. Scope

This policy applies to all donations and fundraising activities conducted by the P&C.

For the purposes of this policy, 'fundraising' includes activities conducted by the P&C that encourage the raising of money or other resources for MLPS other than the standard voluntary P&C contributions.

Examples of fundraising by P&C covered by this policy include:

- Fundraising for a specific purpose (e.g. air conditioning, computers);
- Fundraising to supplement P&C general funds (e.g. sausage sizzles, progressive dinners, discos, quiz nights);
- Fundraising through the sale of commercial goods (e.g. entertainment books).

For the purposes of this policy, P&C fundraising does not include:

- Voluntary P&C contributions;
- Activities where members of the school community, acting as individuals rather than on behalf of the P&C, raise funds on behalf of outside bodies (e.g. by selling raffle tickets to support a charity);
- Fundraising through the provision to MLPS of receipts, vouchers and coupons obtained by community members through commercial transactions enabling the School to redeem those receipts, vouchers and coupons for value (e.g. the Coles and Woolworths programmes).

4. Policy Principles

1. The P&C should only engage in receiving donations or fundraising activities where the funding will help achieve one or all of the following outcomes:
 - Supports the School's goals, values and objectives;
 - Increases the effectiveness of the school's programs;
 - Improves student outcomes and learning;
 - Communicates key messages to target audiences; and/or
 - Enhances the School's public image and reputation (and those of public education).
2. Fundraising for a specific purpose should be clear and understandable to those who are being asked to contribute. If a fundraising purpose is not specified it is a general fundraising activity.
3. Participation in and contributing to fundraising activities is voluntary. While all families are encouraged to support fundraising activities, the right of each school family to determine the level of financial support that they can offer should be respected.
4. Fundraising must have the prior approval of the P&C Committee to ensure it is aligned with these principles and with any other fundraising activities that may be planned or ongoing at the school to ensure that one project does not detract from another and to ensure that fundraising does not present an ongoing demand on the school community.

5. All activities will be planned so sufficient lead time occurs to allow effective communications and coordination between the School and P&C. P&C will regularly communicate its plans through the school newsletter or specific notices if appropriate.
6. The P&C recognises that it has responsibility for all monies collected in its name, and therefore, must be able to produce documentation suitable for audit.

To meet financial auditing requirements:

- a. Any person or group proposing to conduct a fundraising event should outline the project in writing to the P&C so that a process of accountability, including money collection and receipting, can be agreed on before the activity occurs;
 - b. As soon as possible following the fundraising event, the amount raised should be recorded in the P&C Bank book located at the School office and banked;
 - c. All income and expenses associated with fundraising must be documented.
7. The P&C Executive must determine that the fundraising or donations are for a proper purpose. Donations and fundraising activities:
 - Must not adversely affect, or be likely to adversely affect, the safety, health, welfare or best interests of students at the School;
 - Must not require the P&C, School, School staff, School students or Department to endorse, recommend or promote any goods or services;
 - Must not require display of brand names or logos on official school uniform;
 - Must not provide for any student to participate in an activity unless the student chooses to do so;
 - Must not restrict competition or require or lead to the exclusive supply by the provider of goods or services to the School;
 - Must not promote nor enable the distribution of goods or services to the School, School staff or School students if the consumption of the good or service is likely to conflict with the ethos and values of the School or otherwise adversely affect the School's reputation;
 - Must not enable the distribution to students of material promoting or endorsing any particular denomination, sect or political party;
 - Must not provide for the right to name the School or an educational program of the School;

5. Responsibilities

Coordinators of Fundraising Projects

Those coordinating fundraising projects are responsible for:

- Seeking prior approval from the P&C for activities per this Policy;
- Discussing accountability requirements with the P&C before activities commence;
- Documenting receipts and expenses;
- Providing a final report regarding funds raised to the P&C at the completion of the activity; and
- Complying with this policy, Department of Education regulations, and relevant state laws e.g. conducting lotteries/raffles.

P&C

The P&C is responsible for:

- Ensuring that P&C fundraising activities are consistent with this Policy;
- Advising those wishing to conduct P&C fundraising projects of the accountability requirements;
- Approving the scheduling of P&C fundraising activities to avoid negative outcomes;
- Approving P&C fundraising activities before they occur; and
- Accounting for all P&C monies raised in a manner that will meet the auditing requirements.

6. References

Department of Education: Incoming Sponsorship to Schools Policy

<http://det.wa.edu.au/intranet/ccm/detcms/navigation/category.jsp?categoryID=10573013>

The policy is based on the requirements of the *School Education Act 1999* and *School Education Regulations 2000*

WACSSO Policy as amended at the 2011 conference

Mount Lawley Primary School Fundraising, Sponsorship and Donations Policy,
Revision 1, December 2015