

Montecito PAC Fundraiser Guidelines

PURPOSE:

Fundraising is one way that Montecito PAC chooses to support our school and should reflect the values and expectations of the school community, where everyone feels safe, seen, heard, supported, significant, and cared for. In other words every student, staff and parent feels connected to Montecito.

These guidelines have been drafted to ensure that Montecito's fundraisers are well organized, effective and mindful of the school community's limitations in supporting additional activities beyond the primary mandate of providing an excellent educational experience.

Montecito PAC includes ALL parents and guardians of Montecito Elementary students and it looks to:

- sponsor and support worthwhile projects, events, programs and activities, and
- provide social and education opportunities to children and their families at Montecito Elementary School.

OBJECTIVES:

- Identify guiding principles and best practices for school fundraising activities
- Identify the types of school fundraising activities
- Identify how funds are distributed to school and school groups
- Provide examples of acceptable uses of fundraising proceeds

1. GUIDING PRINCIPLES & BEST PRACTICES FOR FUNDRAISING ACTIVITIES

Fundraising at Montecito Elementary is any activity to raise money or other resources that is approved by the school Principal, supported by the Montecito PAC or a school fundraising group operating in the name of the school for which the school provides the administrative process for collection. Such activities may take place on or off school property.

- Fundraising activities must be developed and organized with advice and assistance from the school community (i.e. parents, administration, staff, students, community organizations).
- Purpose for which PAC funds are collected must benefit the school as a whole and be accessible to all school groups and their families if requested and approved.
- Funds collected by PAC shall be deposited to a general account.
- Fundraising activities where tax receipts are issued for \$20 or more should have a designated purpose and the proceeds must be for that purpose as intended.
- The extent and fundraising activities during the school year must be considered. A proposed calendar of fundraising events from Montecito PAC to School Administration will be provided by the end of May for the following school year. School Administration to provide input/approvals of proposed fundraising activities by end of June for activities happening the first quarter of school year, and by end of mid-October for remaining activities for the school year.
- Fundraising activities should not significantly impact staff and student time, and detract from the learning environment.
- All students, parents and staff are welcome to participate in fundraising activities and are strictly voluntary.
- Safety of students must be a primary consideration in all fundraising activities. Student fundraising activities require supervision and should be age-appropriate.
- Fundraising activities need to stay within the BC Healthy Schools guidelines.

2. TYPES OF SCHOOL FUNDRAISING ACTIVITIES

In order to prevent donor fatigue amongst parents, monetary fundraising should be limited to activities where students and school benefits from the funds raised or activity is well-established and highly recognized on behalf of a charity. Non-monetary fundraising activities should be used for community involvement activities to support charities (e.g. Terry Fox Foundation) or culturally-based groups within the community.

School groups (e.g. Odyssey, sports teams, choir) and parents of students who participate in these groups are encouraged to help with PAC fundraising activities throughout the year as funds raised will be placed in a general account and not specifically held for a particular group. When funds are requested, consideration will be made as to how the school and students benefit from the funds being given out, and how much money is available once the goals of the annual budget are met.

If a school group is unable to receive enough funds from PAC supported fundraising efforts within the school, they can look at fundraising ideas outside of school grounds for extra funds. A Fundraising Activity Plan will still need to be submitted to the Principal and PAC Executive for review. Extra funds raised by the group should be deposited into either a school-held account controlled by school administrator/supervising teacher or PAC account (general or school-held). Funds should not be deposited into personal bank accounts. If extra funds are not used during the current school year for its intended purpose, then those monies may be held in a school-held account for up to 2 years for the school group. If the money is not used by the school group within the 2 years, then the school administration and PAC will need to discuss and vote as to how that money will be used.

A. Monetary Fundraising

Activities where funds benefit the students and school as a whole

- PAC fundraising activities may include:
 - Direct donation once per year
 - School-wide fundraising events (e.g. walk-a-thon, read-a-thon, bottle drives)
 - Selling goods or products (e.g. book fair, entertainment books, Purdy's, Neufeld Farms)
 - Selling of food items (e.g. hot lunch program, treat days, concession at special events)
 - Special events (e.g. spring fair, magic night, carnival, art auction, pub night)
- School-led charitable donation fundraising activities include:
(Recommend a \$2 request from each student. Monies raised from these events will be deposited into school held account.)
 - Terry Fox Run
 - Jump Rope for Heart & Stroke Foundation

B. Non-Monetary Fundraising

Activities where resources or participation benefit the community, and teach social values and charitable giving. Activities may include:

- Visiting local seniors
- Caroling in the community
- Collecting food, household items, toys or other items for charity
- Community clean-up
- Grade 7 legacy gift

Initiating a Fundraising Activity

All fundraising activities need to be submitted to the Principal and PAC Executive. All fundraising activities are undertaken and supported through volunteer efforts. In order to expedite the planning, execution and success of our school's fundraising activities, we ask that a plan outlining the proposed fundraiser be provided to the PAC Executive at least 3 weeks (time permitting) prior to the proposed start date of the fundraiser. This allows for adequate discussion and review and sufficient time to communicate to students, staff and parents.

See the Fundraising Activity Plan Form (attached) and include all details as best as possible. Missing information may delay the process of your fundraising activity. All funds raised by parent-initiated events within the school will be placed in a general PAC account and will be distributed as approved by the general PAC.

3. FUND DISTRIBUTION TO SCHOOL AND SCHOOL GROUPS

Any funds raised and placed in the general PAC account are available for Montecito School students and school groups as approved by the general PAC. PAC funds are meant to support the goals of the school budget and provide equitable opportunities for students to develop socially and emotionally.

Examples of Acceptable Uses of PAC Funds

- Assistance fund (e.g. a fund serving a charitable purpose to benefit students such as providing payment for the cost of a field trip for students who can't afford it)
- Purchases of additional supplies, equipment or services not funded specifically through school budget (e.g. band equipment, athletic equipment, art equipment)
- Field trips or other excursions (e.g. in-province, out-of-province, or trips abroad)
- Guest speakers or presentations
- Ceremonies, awards, plaques, trophies or prizes for students
- Establishment of scholarships or bursaries
- Extracurricular activities and events (e.g. travel and entry fees for sports competitions, school team uniforms, band, choir, clubs, etc.)
- School improvement projects (e.g. playground equipment, shade structures, gardens, green initiatives, murals)
- Upgrades to school facilities that do not increase the student capacity of the school (e.g. water fountain, sound system, not building a cafeteria, stage or retrofitting an auditorium)
- Technology investments which complement and do not replace existing school district allocations

How to Request PAC Funds

Distribution of PAC funds need to be reviewed by PAC Executive and Principal, and approved by the general PAC during a PAC meeting. School groups, students, staff or parents who wish to receive funds from PAC will need to provide PAC Executive with information about their request at least 4 weeks (time permitting) prior to when the funds will be needed. This allows for adequate discussion, review and for a motion to approve at the next PAC meeting.

See the PAC Fund Request Form (attached) and include all details as best as possible. Missing information may delay your fund request.

MONTECITO ELEMENTARY SCHOOL PAC Fundraising Activity Plan

Have a great fundraising idea that you want to organize for Montecito Elementary?

If YES, please fill out the form below outlining your fundraising plan. Submit the form at least 3 weeks before your proposed fundraising date to the office for the PAC Executive and Principal to review or email to pacmontecito@gmail.com. A PAC executive member will get in touch with you to discuss your ideas.

1. What is your fundraising activity (e.g. freezie sale, movie night, bake sale...)? Briefly describe.

2. Name of organizer/primary contact (include phone and email)

3. Who is involved (e.g. school group like Odyssey, choir, volunteer parents, etc.) in the fundraising activity?

4. Proposed Date of Fundraising Activity: ___/___/___ (mm/dd/yr)

5. Duration of Fundraising Activity: _____ (indicate time or number of days)

6. Location of Activity

___ School (indicate specific location: gym, kitchen, hallway, etc.)

___ Other _____ (specify community location)

7. Projected revenue. Describe collection target on either as a per child/family amount or school-wide level.

8. Expected required parent involvement (how many volunteers are needed and for how long?)

9. Expected staff involvement (how much time will the teachers need spend on this fundraising activity and for how long?)

Administration Use Only

Date Received:

Reviewed and approved by Principal: _____ , _____ (Date)

Reviewed and approved by PAC Executive: _____ , _____ (Date)

Comments:

**MONTECITO ELEMENTARY SCHOOL PAC
PAC Funds Request Form**

School groups, students, staff or parents who wish to receive funds from PAC will need to complete the request form below and return to the office for the PAC Executive and Principal to review or email to pacmontecito@gmail.com. The request will be brought up at a general PAC meeting for members to discuss and vote on whether to approve the funds. Please submit at least 4 weeks (time permitting) prior to when the funds will be needed.

- 1. Name of group/person requesting PAC funds?**
- 2. Name of primary contact (include email and phone)**
- 3. Amount of PAC funds requested: \$_____**
- 4. What is this money being used for and why?**

- 5. How will the Montecito School and/or students benefit from the funds?**

- 6. When do you need the funds by?**

Administration Use Only

Date Received:

Reviewed by Principal: _____ , _____ (Date)

Reviewed by PAC Executive: _____ , _____ (Date)

Approved by General PAC: _____ (Date of Meeting)

Approved Amount: \$_____

Comments: