

Helena Public Schools Fundraising Request Form

Important

This form must be completed and approved PRIOR to initiating any fundraising activity.
There will be no post approvals. Please plan accordingly.

Date Submitted: _____

Proposed Fundraising Dates: _____

Name of individual submitting request: _____

Email: _____ **Cell Phone:** _____

Does your organization have an account established with the HPS Business Office? Y N

Type of Fundraising activity: (Please provide a thorough description of the proposed activity. Include how funds will be raised (e.g. student activity, online, etc.) If funds will be raised online identify what online site will be used (e.g. DonorsChoose, GoFundMe, etc.)

What will these funds be used for?

All funds raised need to be reported and managed by school office staff. Who will be responsible for tracking the funds and reporting to the school secretary or bookkeeper – include name, email, and cell phone number if different from person submitting this form?

Describe in detail any student involvement?

How will the information regarding the fundraising activity be shared and with whom?

Will school property or materials be used for this activity? If yes, please describe.

- Fundraising for any type of **technology** must have the pre-approval of the District Technology Administrator.

District Technology Administrator

Date

- Fundraising for any type of **construction, facility modification or installation** must have the pre-approval of the District Facilities Director.

District Facilities Administrator

Date

- Fundraising for any type of **curriculum or supplemental curricular materials** must have the pre-approval of the District Curriculum Administrator.

District Curriculum Administrator

Date

- Fundraising for any type of athletic team or activity must have the pre-approval of the appropriate high school principal.

High School Principal

Date

FINAL APPROVAL:

Building Principal / Program Supervisor

Date

A copy of this completed form has been sent to the appropriate Assistant Superintendent.

_____ Yes _____ No

Form Rev.: 2.2.2022

FINANCIAL SERVICES

District, School, Student Group Fundraising

Purpose

The purpose of this policy is to establish the parameters for fundraisers or requests for resources sponsored by the district, a school, employees, or student activity groups. This policy does not apply to third party organizations that may choose to fundraise for the district, specific schools, programs or activities.

Because students are required to attend school, and because the primary purpose of school is the education of those students, it is essential that school and district fundraising activities be limited so as not to interfere with that primary purpose. It is essential that fundraising activities of schools, student groups, and employees conform to this purpose, and to all federal and state laws governing the holding and use of funds raised.

At no time shall any student be required to participate in any school sponsored or school related fundraising activity.

Teachers, student activity advisors, club sponsors, coaches, and others involved in fundraising are responsible for following the appropriate financial requirements for funds raised through classroom, group, online, or team activities. The sponsoring employee is responsible for obtaining permission, instructing students regarding fundraising activity conduct, and reporting the results of the activity to the principal. The principal or supervisor is responsible for reporting all fundraising activities to the Assistant Superintendent on an annual basis.

Only district related/approved groups are permitted to operate under this policy and non-District groups may not use the District's name, network or infrastructure to conduct fundraising.

As public employees, staff members are subject to Montana public employees' ethics laws. Staff members may not solicit or accept material, cash, or equipment intended for personal use from individuals or through a crowd source effort that could be considered a gift of substantial value or that otherwise violates the ethics statutes.

School Fundraising

Requests for school fundraising projects must be pre-approved by the school principal or supervisor. This includes online fundraising.

The sale or advertising of merchandise in the school buildings, online, or upon the school grounds or as a school project for money-raising purposes may be limited by the principal or supervisor as to the number and time of year.

Students in the schools shall not be used to advertise or distribute any particular brand name or to promote the sale or use of products of any company so advertised.

Fundraising projects that do not involve the entire school shall be proposed to the principal by the teacher or teachers whose classes, student activity, or group will participate. The principal may approve or deny the proposal based on the following factors:

- The scope of the fundraising project; method to be used, including length of time, items sold, or method of solicitation.
- The number of fundraising activities entered into by classes, groups or others that affect the school and its students during the school year.
- The appropriate nature of the fundraising activity given the age and understanding of the students involved.
- The extent of student involvement.
- The impact of the requested resource on facilities, technology, and curriculum/instruction.

A file is to be maintained at the school or department for any fundraising request. This file should include: the principal's/administrator's fundraising approval form, the written detail of the projects as well as what is posted on any online platform / website, any photos or images posted with the project and a copy of all agreements and permission forms.

Fundraising activities should primarily be done outside of school hours.

Door-to-door fundraising activities and any fundraising activities during the school day shall be of a limited nature.

Crowdfunding

If a crowdfunding proposal is approved:

- The individual who initiated the crowdfunding effort shall immediately notify the Superintendent or designee when the request has been posted and how long it will remain active online.
- For any funds raised on a crowdfunding site a check should be requested to be mailed to the school in the name of the school, not to an individual person.
- All gifts, grants, bequests, and contributions must be officially accepted in accordance Policy 7005 (Revenue and Investments).
- All non-monetary items (supplies, equipment, etc.) obtained are the property of the Helena School District and all inventory procedures apply, and, if applicable, will remain in the school where the proposal originator was located at time of the grant award unless a move to another site is approved by the principal or supervisor.
- All monetary donations should be recorded by the business manager/clerk in the Schools Funds accounting system at each school.

Student Activity Fundraising

Fundraising activities must be approved by the staff advisor of the student activity group and forwarded to the principal or supervisor for pre-approval.

The principal or supervisor shall approve or reject the application of any student group, whether co-curricular or extra-curricular, including athletics, for any fundraising activity taking place on school grounds or in the school or district's name. No fundraising activities may commence prior to approval.

Students participating in fundraising activities are expected to appropriately represent their activity, their school, the district, and their community. All district policies regarding student conduct and discipline apply to fundraising activities.

Fundraising from District Staff

The Superintendent may authorize solicitation of funds or pledges from district employees on an annual basis by organizations authorized to do so by the Superintendent or Superintendent's designee.

- Funds collected or pledged via payroll deductions shall be sent to the authorized fiscal agent or central headquarters of the respective approved organizations.
- Employees shall exercise freedom of choice in choosing to donate or pledge, and may choose between various approved organizations.

In addition to the annual charitable giving program referenced above, the Superintendent may authorize additional charitable giving campaigns that solicit donations from staff in response to natural disasters or other charitable purposes.

Exceptions

School Stores. Schools may operate school stores which offer for sale to students or employees simple school supplies and items emblematic of the school under the permission and supervision of the principal or supervisor. Such stores shall not be considered to be a school-wide fundraising project.

Charitable Giving Campaigns. Principals may authorize charitable giving campaigns that solicit contributions from students in response to natural disasters or other charitable purposes. It is preferred that such charitable giving campaigns concentrate on non-monetary contributions, such as food, used or new toys and clothing. Contributions being requested should be limited to small monetary values. Prior parent notification is required for any charitable solicitation from students. Participation must be completely voluntary and not tied to any extrinsic reward system.

Concessions and Vending. Concession and vending sales connected to a student activity or student performance may be conducted with the permission and under the supervision of the Principal or program supervisor. The District may procure vending or concession products through quotes, bids, requests for proposals or other methods allowed by law.

Student Product Sales. Schools may conduct the sale of articles that are wholly or in part the product of students in a recognized activity of the school for general, activity or charitable giving fundraising purposes. Such sales shall be approved in advance by the principal or supervisor, and conducted under her or his supervision.

Legal References:	§20-6-601, MCA.	Power to accept gifts
	§20-6-604, MCA.	Sale of property when resolution passed after hearing – appeal procedure
	§2-2-102(3), MCA	Definitions
	§2-2-104, MCA	Rules of conduct for public officers, legislators and public employees

Cross References: 7005 Revenue and Investments

Policy History:

Adopted on: 05.13.2014

Revised on: 01.10.2017, 06.13.2023