



3000 - Finance 590 - Fundraising

1. Purpose

- 1.1. Within the law, including fee waiver laws, fundraising is generally permitted by the Board of Trustees (Board) or by Providence Hall Charter School (PHCS) administration to allow PHCS to raise additional “local funds” to supplement authorized PHCS-sponsored programs.

2. Definitions

- 2.1. **Local funds** are defined as funds received by PHCS that are not state or federal program funds, or funds from state or federal sources as established in law.
- 2.2. **School-sponsored** means programs, activities, fundraising events, clubs, camps, clinics, sports, and any other event, or activity that are authorized by the Executive Director, Board, and/or Board committees, including the authorized PHCS parent organization or authorized curricular PHCS clubs, activities, sports, classes, or programs, etc. satisfying one or more of the following criteria:
 - 2.2.1. The activity is managed or supervised by PHCS administration, staff, or PHCS approved (authorized) volunteers.
 - 2.2.2. The activity is not managed, supervised, or provided by another authorized and properly insured entity.
 - 2.2.3. The activity uses the PHCS facilities, equipment, or other PHCS resources.
 - 2.2.4. The activity is supported or subsidized, more than inconsequently, by public funds, including the public school’s activity funds or Minimum School Program or federal dollars.

3. Policy

- 3.1.
- 3.2. Fundraising at the Board level is only authorized after consultation with the Executive Director and by an affirmative Board vote.
- 3.3. The Board shall at least annually review the local fundraising activities of PHCS and all local activities that support or subsidize PHCS.
- 3.4. The Board shall ensure that revenues raised during fundraising activities or through activities that support PHCS are raised within all established regulations and policies and that they support the PHCS mission and vision.
- 3.5. PHCS shall not enter into fiscal agent agreements, cohorts or consortiums, etc. without Board approval.
- 3.6. Fundraising at the school level is only authorized and administered by the Executive Director, within the parameters of Board policy.
- 3.7. Fundraising at the school level includes fundraising activities of the PHCS own parent organization (regardless of what it is called) and is also authorized by and under the direction of the Executive Director.
- 3.8. Grants not provided by state or federal sources in the regular operation of PHCS are also defined as fundraising and must be approved by the Executive Director and the Business Administrator, and where encumbrances are present or strings are attached, the Board. It is the responsibility of the Executive Director to ensure proper compliance with all grant requirements applicable to grantees, including state or federal regulations and guidance where applicable.
- 3.9. The Board and the Executive Director shall not circumvent established PHCS fee regulations by calling what is ordinarily a “fee” a “donation” to avoid fee waiver regulation.
- 3.10. Funds requested voluntarily from PHCS patrons for fundraising activities must always be voluntary contributions.



- 3.11. PHCS shall comply with UCA R277-407 School Fees fundraising requirements and restrictions, including the implications on school fees and fee waivers by:
 - 3.11.1. Not requiring or allowing required individual fundraising, but may provide for optional individual fundraising opportunities for students to raise money to offset the cost of the student's fees.
 - 3.11.2. Ensuring individual student fundraisers are included as part of the maximum fee amount per student and total aggregate fee amount per student.
 - 3.11.3. Allowing for group fundraisers.
 - 3.11.4. Not denying a student membership on a team or group if the student does not participate in a fundraiser.
 - 3.11.5. Complying with R277-113 when using alternative methods of raising revenue that do not include students.
 - 3.11.6. Notifying parents/guardians of required group fundraising, providing specific details including the nature of the required fundraiser, and the estimated participation time required of the parent/guardian or student.
- 3.12. All local funds are public funds once PHCS receives the award, including before the award is deposited in the PHCS financial institution.
- 3.13. All expenditures of PHCS, including expenditures with local funds raised during fundraising activities shall be made in accordance with the law and established PHCS policies and procedures.
- 3.14. All items purchased with funds gained through fundraising activities are the property of PHCS, with the exception of supplies, clothing, or other materials provided through PHCS programs for student consumption or ownership (co-curricular or extracurricular activity uniforms, completed project work, etc.)
- 3.15. Activities of approved volunteers (PHCS non-employees) in relation to fundraising activities of any kind must be overseen by the Executive Director (or designee).
- 3.16. The Executive Director shall ensure that all activities of fundraising activities and parent organizations are adequately reviewed and considered with the PHCS insurer to evaluate and manage risks associated with such activities.
- 3.17. Conflict of Interest forms must be completed annually when persons employed by or affiliated with PHCS are also involved in fundraising organizations working on behalf of for the benefit of PHCS or who temporarily hold funds that will benefit PHCS.
- 3.18. The Executive Director shall develop procedures for all local fundraising activities.
- 3.19. Properly approved school-sponsored activities:
 - 3.19.1. May use the PHCS' name, facilities, and equipment.
 - 3.19.2. May utilize PHCS employees and other resources to supervise, promote, and otherwise staff the activity or fundraiser.
 - 3.19.3. May be eligible to be insured under the PHCS liability insurance policy (subject to the policies of the school's insurer).
 - 3.19.4. May provide additional compensation or stipends for PHCS employees with the approval of the Executive Director and under PHCS payroll policies and consistent with the PHCS budget.
- 3.20. Fundraising activities, or activities of outside organizations of any kind that are not PHCS-sponsored activities, must be conducted at arm's length so that revenues and expenditures are not commingled with the public funds of PHCS.