

POLICY: FUNDRAISING FOR THE SCHOOL COMMUNITY AND REFUND PROCEDURES

Rationale (Purpose)

To enable an equitable method of obtaining additional funding for the activities of the school community.

Guidelines (Objectives)

1. The specific activity for which funds are being raised has been approved by the school.
2. No fundraising is to be undertaken by teams, groups of students of Rotorua Lakes High School without approval in principle from the school.
3. All people organising the fundraising are made aware of the rules and requirements as outlined below:

The following are examples of the fundraising likely to be approved:

- Sale of goods, raffles, quiz evenings, dances, sponsorships, demonstration evenings, and charitable trusts, etc.
- Any activity considered appropriate and acting in the best interests of the students involved, including fundraising to attend a sports tournament, purchase of team uniforms, the purchase of school equipment, cultural trips, and class or club activities.

Fundraising Applications

1. Fundraising applications – including charitable trusts and other organisations
All applications (including those from parent groups) are to go through the Board of Trustees (BOT) for approval. These must be submitted to the Principal at least two weeks prior to the meeting.

Any fundraising submissions should include:

- Detail of the proposal or project, including objectives, number of members or people to benefit and commencement/completion dates.
- A budget for the planned activity
- At least 2-3 current quotes from suppliers
- Name of person responsible for the financial control of the project.

Plus any further information required by the Charitable Trust involved.

2. If two groups make application to the same organisation, the BOT will decide which application will be put forward. This will be decided on previous or concurrent applications from the same group, the timing of the event for which the application is being used for and the likelihood of success. The school may put forward two applications to the same organisation in exceptional circumstances only. This is to ensure that successful applications are spread across as many school groups as possible. Unsuccessful applicants will have the opportunity to resubmit at the following meeting if appropriate.
3. In the instance where funding organisations only allow one funding application per year, the school will make every effort to accumulate group applications or create a joint application. To enable the school to facilitate this, the school community will be required to provide these applications to the Principal mid-November for funding submissions for the following year.

It should be noted that the BOT will not accept a ‘scattergun’ approach where there are applications to several organisations in the hope that one or two will be successful. More than one charity can be approached but they must be for different purposes. For example, one application for a tournament can be for travel costs and a second application to a second charity is for tournament uniforms for the same group. If a request for funds is denied by any one organisation, an additional application can be put forward at this stage.

Once funding has been approved the following must be adhered to:

1. The person in charge of the fundraising activity will oversee the purchase of any goods required for fundraising, eg. sausages, pies, etc, using a school order book.
2. All money collected from a fundraising activity is to be promptly receipted and deposited into the school bank account. No group will have bank accounts outside the school bank account.
3. The Executive Officer will set up separate cost centres if required to ensure funds are kept separately from other groups. For individual students, a spread-sheet system will monitor funds raised. Any funds raised over and above the activity will be refunded to the individual student's caregivers after the activity has taken place, and all costs are accounted for.
4. All funding activities will be carried out in a manner that does not discredit the school or expose any person to unnecessary health or safety risks.

Please note:

In the event of insufficient funds being raised for an activity, the Principal and Executive Officer must be notified immediately. The Principal will decide, after consultation with all parties, to consider whether the activity will take place or not and whether to refund or reallocate the funds. **Note:** Refunds will be the sum of monies left after all liabilities are met.

The school will not underwrite any shortfall of funds. A failure to meet the required funding level will result in an activity or trip being cancelled. Any costs incurred because of the cancellation will be charged against the funds raised. Any grants secured from charitable organisations will be refunded to the trust (this is a requirement of all charitable trusts). The balance of funds raised for this purpose will then be refunded.

Refunds will not be made to students who are not allowed to participate because they fail to meet uniform requirements/behaviour requirements for the trip/event.

In the situation where an unexpected expense has occurred during a trip or activity, (not recoverable by travel insurance), the costs will be spread evenly among the students involved. Accounts will be sent to parents.

REVIEW: This policy will be reviewed according to the Board of Trustees' triennial Programme of self review (SEP 2023)

DATE CONFIRMED: SEPTEMBER 2020