

Lincoln Academy
Fundraising
Procedure

Revised

December 2007

February 2009

I. Purpose

Recognizing that Lincoln Academy families wish to minimize exposure to fundraising solicitation, the purpose of this procedure is to direct all fundraising committees at Lincoln Academy. All committees at Lincoln Academy are voluntary and hours spent working on the committees will go toward the 20-hour commitment.

II. Obtaining Permission

- A. Long-term fundraising proposals must be submitted on the *Lincoln Academy PTO Fundraising Plan Form* (see Appendix A) to Administration and the PTO Board for review in the year prior to the start of fundraising.
- B. Short-term or discretionary fundraising proposals should be submitted to Administration and the PTO Board as soon as possible, preferably before a PTO Board meeting 1-2 months before the start of the proposed fundraiser.
- C. For more detailed instructions, see sections V. A. and VI. A. below.

III. Types of Fundraisers

A. Inside School Fundraisers:

- 1. Are advertised at Lincoln Academy or to Lincoln Academy families.
- 2. May or may not be conducted at Lincoln Academy.

3. 5th and 6th grade students earning funds for Outdoor Lab in grade 6 are allowed 2 Inside School fundraisers.
4. Middle School students earning funds for the science or Washington D.C. trips are allowed to have 3 Inside School fundraisers.

B. Outside School or Community Fundraisers:

1. May not be advertised at Lincoln Academy or to Lincoln Academy families for the purpose of minimizing exposure to solicitation.
2. May not be conducted at Lincoln Academy.
3. 5th and 6th grade students earning funds for Outdoor Lab in grade 6 are allowed 2 Outside School or Community fundraisers.
4. Middle School students earning funds for the science or Washington D.C. trips are allowed to have 3 or more Outside School or Community fundraisers as approved by Administration and the PTO Board.

C. Discretionary Fundraising:

1. A limited number of undesignated fundraisers (i.e. "Hat Days") may be conducted at the discretion of the Administration and the PTO Board.
2. Two of these types of fundraisers are suggested per school year.
3. Proposals for these fundraisers must be submitted in writing to the Administration and/or the PTO Board no later than the day before a PTO Board meeting.

IV. General Fundraising Guidelines

- A. There will be no mandatory fundraising activity for any student at Lincoln Academy.
- B. Parents or guardians must authorize in writing, participation of their student in each specific fundraising event.
- C. Families who choose to opt out of fundraising for a specific activity agree to pay for that activity in full and will have no share in fundraising profits.

V. Fundraising Committee Chairperson Guidelines

- A. Fundraising Committee Chairpersons need to meet with the LAPTO Treasurer or Middle School teacher liaison (if applicable) prior to the start of the fundraiser to discuss the procedures/policies for the fundraiser.

- B. It is the responsibility of the Fundraising Committee Chairpersons to send out orders, collect order forms, consolidate orders for vendors, distribute merchandise, collect and tally money for the Middle School teacher liaison, PTO Treasurer, and/or the LA Financial Secretary per a pre-approved procedure.
 - 1. It is the responsibility of the Fundraising Committee Chairpersons to collect funds and/or fees from NSF (Non-sufficient funds) checks.
 - 2. The amount of the returned checks, plus any associated fees, will be deducted from fundraiser proceeds.
 - C. It is not the responsibility of the vendor or the school office (unless otherwise stated in written form from the vendor) to consolidate orders or distribute merchandise for Lincoln Academy.
 - D. See *LAPTO Committee Responsibilities* (Appendix B).
- VI. Guidelines for 5th and 6th Grade Fundraising for Outdoor Lab in 6th Grade

A. Obtaining Permission

The *Lincoln Academy PTO Fundraising Plan Form* (see Appendix A) shall be filled out and submitted to the PTO Board and Administration before presentation at the April PTO meeting in the year prior to the start of fundraising.

B. Funds

- 1. Funds may be designated by the parent of an enrolled LA student for children within the student's immediate family (children, stepchildren, or foster children).
- 2. Excess funds raised by a student for Outdoor Lab may, at the discretion of the student's parent or guardian, be applied toward fundraising for the 7th/8th grade science or Washington D.C. trip for that same student or a sibling.
- 3. When a family no longer has any student enrolled at Lincoln Academy, either by withdrawal or completion of 8th grade, all remaining funds in the student's/family account will be absorbed by Lincoln Academy.
- 4. No refunds or rebates will be made to students or their parents. All proceeds will be applied to the account of an active LA student or absorbed by Lincoln Academy.
- 5. If a student transfers to another Jefferson County Public School, that individual student's Outdoor Lab fundraising proceeds may be transferred to that Jefferson County Public School.

VII. Guidelines for Middle School Fundraising for Washington D.C. or Science Trips

A. Obtaining Permission

1. The *Lincoln Academy PTO Fundraising Plan Form* (see Appendix A) shall be filled out and submitted to the PTO Board and Administration before presentation at the January PTO meeting prior to the start of fundraising. The Middle School fundraising year is defined as February 1-January 31.
2. If initial fundraising proposals have not been submitted on the *Lincoln Academy PTO Fundraising Plan Form* to Administration and the PTO Board as stated in section VII. A. 1. above:
 - a. Proposals for Inside School Fundraisers must be submitted in writing to Administration and the PTO Board at least a month before the start of the first fundraiser.
 - b. Proposals for Outside School or Community Fundraisers must be approved by the Middle School teacher liaison, Administration and the PTO Board as soon as possible prior to the start of the fundraiser.
3. Some fundraisers may have limits to the number of participants allowed.

B. Funds

1. Funds raised will be distributed only to students, parents or guardians registered to attend a Middle School trip. Parents or guardians of registered students are encouraged to help with fundraising in order to support their student(s).
2. Parents or guardians registered to attend a trip may earn funds for themselves by participating in individual fundraisers only (i.e. selling Entertainment Books, Papa Murphy's cards). Funds earned from group fundraisers (i.e. spaghetti dinner, rummage sale, school store) will be divided among registered *students* only.
3. Funds may be designated by the parent of a registered student for other registered students within the student's immediate family (children, stepchildren, or foster children).
4. Excess funds raised by a student for Outdoor Lab in 5th or 6th grade may, at the discretion of the student's parent or guardian, be applied toward fundraising for the Middle School science or Washington D.C. trip for that same student or a sibling.
5. If a registered student withdraws, cancels or is removed from a trip:
 - a. No refund or rebate of fundraised money will be made by Lincoln Academy to that student or their parents/guardians.

- b. Fundraised money may be designated by the parents/guardians for another registered student within the student's immediate family (children, stepchildren, or foster children).
- c. If a family has no other registered students, fundraised money will be forfeited to a "general fund" which will be used for trip scholarships or divided evenly among current trip participants.
- d. The group travel agency (i.e. WorldStrides) may refund out-of-pocket money that has been paid by a family on behalf of a student. A monetary penalty will most likely be incurred. Please refer to company policies.

Appendix A

**Lincoln Academy PTO
Fundraising Plan Form
School Year 20____ - 20____
____ 5th Grade ____ Middle School**

Inside School:

Type of Activity

#1 _____

#2 _____

#3 (*8th Grade Only*) _____

Description of Event

#1 _____

#2 _____

#3 (*8th Grade Only*) _____

Outside School:

Type and Location of Activity

#1 _____

#2 _____

#3 (*8th Grade Only*) _____

Description of Event

#1 _____

#2 _____

#3 (8th Grade Only) _____

Date Submitted _____

Reviewed By _____

Appendix B

Lincoln Academy PTO

LA PTO Procedures for Volunteers, Vol. 1, Created 9/10/08, Revision #3, Revised 11/8/08

Committee Responsibilities

Committees will be formed and supervised by the PTO. Committees will consist of a Chairperson(s) and/or Co-Chairperson(s) and Committee Volunteers. Committee Volunteers are asked to attend committee meetings as needed and assist the committee with implementation of projects related to the event. Committees will also evaluate projects/events/programs, and also present new ideas.

Outline of Chairperson Responsibilities

Chairs and Co-Chairs are asked to head the committee, host organizational meetings as needed, prepare brief reports, set goals, develop action plans and manage the operations of the committee and the event. Chairs, Co-Chairs and/or a committee volunteer are asked to attend PTO Meetings as needed or requested to report on event progress. PTO Meetings are held the 3rd Tuesday of each month at 6:30 p.m. at the school.

To include (with the help of your committee):

- ◆ Take charge of directing, managing and implementing projects, programs or events
- ◆ Coordinate and contact other volunteers who signed up – **DO THIS FIRST!**
- ◆ Set project budgets and secure approval
- ◆ Request budgeted funds for your event from the PTO
- ◆ Track project expenditures

- ◆ Assist with recruiting additional volunteers if needed
- ◆ Delegate responsibilities
- ◆ Manage action plan and timeline for event
- ◆ Communicate pertinent information in a timely fashion to school community & PTO
- ◆ Maintain proper files
- ◆ Obtaining necessary authorization for projects
- ◆ Communicate and meet with the PTO as needed & requested
- ◆ Assist with flyers/memo/posters & other communications/notices for Friday Principal Memo as needed to promote the event/project at school. (**Please see Lincoln Academy Processes for PTO attached for further guidelines.**)
- ◆ Assist with new idea development.
- ◆ Remind your committee volunteers to record their volunteer hours! For further information on the LA Volunteer Program refer to the **Parent Volunteer Handbook**.

Commitment: 1 school year or 1 event as it pertains to the specific committee

If your committee is involved with a fundraising event:

***Fundraising:** The Chairperson of any Fundraising Committee must supervise and maintain accounting of funds raised for the purpose of the fundraiser. This person will need to work closely with the Treasurer of the PTO to maintain accurate and proper records of all fundraising monies. All funds for Lincoln Academy fundraisers must be properly secured by the Chairperson and/or PTO Treasurer. For clarification contact the PTO. Please review the processes outlined in the "**Lincoln Academy Fund-Raising Procedure Guidelines**". A Fundraising Report needs to be submitted to the PTO. Additional duties **may** include setting and attaining financial goals for the year, assist with determination of how raised funds will be allocated and providing reports explaining the aforementioned.

NOTE: If involved with a fundraiser that is raising funds specifically for Outdoor Lab or Middle School trips, **you must keep track of how much money each individual student raises.**

Waste Management Recycle America – The school does participate in a streamline recycle program. The recycle dumpster is located near the entrance to the parking lot. The following items are accepted: newspapers, phone books, cardboard boxes, aluminum, glass and plastics. Please be sure to recycle while working on events and projects!