

Christ Church Episcopal School
Fundraising Policy & Guidelines

Updated 7/1/09

Fundraising at CCES is conducted under the guidelines established by the School Board and the President and implemented by the Advancement Office. For the purposes of this policy, "fundraising" is defined as the solicitation of money within the school or larger community in order to fund, create, or enhance any project/event/entity that is not underwritten by the operating budget. Fundraisers should promote unity and spirit by creating opportunities for students, teachers, and parents to work together to accomplish mutual goals. All fundraising activities should strive to promote an environment for learning and service to CCES and the community at large.

Annual Giving remains the highest ongoing fundraising priority, generating 4% of the operating budget. The goal is to incrementally increase that percentage to 10%, thus reducing our dependence on tuition. Additional campaigns or targeted efforts to raise funds for endowment, facilities, and capital needs are directed by the Advancement Office.

Recognizing that there are times when it is appropriate and necessary to raise funds that are not covered by the operating budget for classes, service learning initiatives, teams, clubs, and organizations, all organizations are asked to follow the attached guidelines.

Previously approved yearly fundraisers include the membership drives of the Booster Club and Arts Guild; *A Cavalier* Evening; Alumni Golf Tournament; ticket sales to the fall drama, winter musical, cabaret, and Middle School revue. Dates of all of these fundraisers must be approved through the Advancement Office and approval of these activities in future years is not guaranteed.

The Advancement Office will maintain a calendar of all CCES related fundraising efforts to ensure that such endeavors do not conflict/compete in terms of timing, to ensure that the community is not inundated with competing fundraising requests, and to safeguard "resource equity."

Guidelines for All Fundraisers

- Fundraisers are subject to approval by the Vice President for Advancement.
- Fundraising activities must be sponsored by a recognized entity within the school.
- All requests for fundraising approval from support organizations seeking to raise \$500 or more for the next school year should be submitted by April 15.
- All requests for fundraising approval from student organizations must be presented a minimum of 8 weeks in advance of the proposed date or by October 1, whichever is earlier. (In the event of an emergency/unforeseen situation exceptions may be made to the October 1st deadline.)
- Fundraisers must adhere to all applicable Federal/State/Local regulations including the collection of sales tax when appropriate and conform to acceptable standards and practices of fundraising.
- Fundraisers may not start or be publicized until all permissions have been given, and the Fundraising Request Form has been filled out and signed by all appropriate authorizers.
- Fundraisers will not be approved that, in the judgment of the Vice President for Advancement, diminish the impact of previously approved or scheduled fundraising efforts of the school (Annual Giving, capital/endowment campaign, or major event) designed to produce significant non-tuition revenue. Assessment will also be made as to the merit/legitimacy of the objective.
- Fundraising which seeks to solicit individual/business cash or in-kind donations must be reviewed and approved by the Vice President for Advancement to ensure that such a solicitation does not interfere with long-range fundraising objectives.
- All funds raised must be accounted for in a manner acceptable to the Vice President for Finance and Operations.
- To ensure consistency and accuracy, publicity materials used in conjunction with any fundraising endeavor must be reviewed and approved by the Vice President for Advancement prior to distribution. This includes but is not limited to posters, flyers, solicitation letters & forms, information to be sent to any media.
- Use of the school seal or other school logos in any fundraising activity must have specific approval of the Advancement Office.
- All fundraisers must complete the Fundraiser Evaluation Form at its conclusion and return same to the Advancement Office.
- If appropriate, a member of the Advancement Office staff will be made available to assist any group with the development and execution of their fundraising plan.

Student Fundraising

Student fundraising activities are an adjunct to the educational program and as such must be approached in such a way as to enhance its "learning potential," that can be defined as encouraging students to take responsibility, to be more involved in the larger school community, to work with a group, to promote school spirit, and to learn valuable business lessons.

- Student fundraising is limited to approved clubs, organizations, and service learning.
- Student-run fundraisers must have a faculty/staff sponsor and first be approved by the appropriate division director to ensure that such activity does not interfere with the educational process.
- Students may not go door-to-door selling a product. Students may sell products, raffle tickets or event/activity tickets only to people they know.
- Student participation in any fundraising activity is strictly voluntary.
- Consent or waiver forms signed by parent or guardian may be required to participate in certain fundraising activities.
- Lower & Middle School students may not handle any money to eliminate the risk of loss, theft, and other problems.

School Affiliated Fundraising

- School affiliated groups are those organizations established and recognized by CCES and include: Parents Organization, Arts Guild, Booster Club, Alumni Organization, Cavalier Classics, Golden Cavaliers, International Committee.
- Such groups should meet with the Advancement Office during the spring or summer months to review their fundraising plans for the coming year to ensure that such plans are incorporated into the overall fundraising activities.

Departmental Fundraising

- Any department seeking funding beyond the operating budget must secure approval from the appropriate Division Director and submit such request to the Headmaster.
- Once approved, the Advancement Office will assist departments in developing an appropriate plan to raise such funds.