



Capital Related Fundraising and Community Donations

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Statement of Policy

The Grand Erie District School Board supports, facilitates and encourages the development of authentic, mutually beneficial relationships between schools and the larger community, including business and non-business sectors, with due sensitivity and regard for the legitimate needs of all parties involved.

Accountability:

1. Frequency of Reports – As needed
2. Criteria for Success – Contributions for Capital Donations meet the criteria
– Public input recognized

1. Ethical Guidelines

The Grand Erie District School Board subscribes to the following ethical guidelines from the Conference Board of Canada.

Partnerships are supported which:

- enhance the quality and relevance of education for learners
- mutually benefit all partners
- treat fairly and equitably all those served by the partnership
- provide opportunities for all partners to meet their shared social responsibilities toward education
- acknowledge and celebrate each partner's contributions through appropriate forms of recognition
- are consistent with the ethics and core values of all partners
- are based on the clearly defined expectations of all partners
- are based on shared or aligned objectives that support the goals of the partner organizations
- allocate resources to complement and not replace public funding for education
- measure and evaluate partnership performance to make informed decisions that ensure continuous improvement
- are developed and structured in consultation with all partners
- recognize and respect each partner's expertise
- identify clearly defined roles and responsibilities for all partners
- involve individual participants on a voluntary basis
- are congruent with the Grand Erie District School Board multi-year plan

2. Principles for fundraising activities

There may be times when fundraising is proposed to support capital items. These might include *capital-related* or small-scale capital items such as computers, furniture, street signage or creative playgrounds. There might also be occasions when there will be fundraising for a *capital project*—such as a school auditorium, theatre or gymnasium.

For both *capital-related* and *capital projects*, the proposal for such fundraising may come from a parent group, community organization or at the request of the Grand Erie District School Board. Such fundraising must meet the Guidelines and Principles of this policy and for all capital project fundraising, a Viability Review is a required part of the process.

The Viability Review is not required for *capital-related items* or small-scale capital items, as described above.

The principles which are outlined below are intended to provide guidance to schools in the area of acquiring resources from non-Grand Erie District School Board sources. These may be financial, human, or material in nature.

Arrangements are supported which:

- reflect a philosophy of support and assistance to schools and students
- are consistent with Grand Erie District School Board values
- include consultation with the local school community
- are legal, ethical, and benefit students (example: no tobacco or alcohol products)
- are subject to the discretion of principal and staff in the use of donated materials, resources and services
- do not require students to listen to or read commercial advertisements (i.e. avoids commercialization)
- are subject to normal audit process and system accountability
- involve specified time frames and include a regular review of arrangements
- involve cooperative (consortium) efforts to achieve maximum commercial advantage (e.g. multi-school and multi-board) wherever possible
- allow for recognition by board and school, including display of corporate symbols where acceptable and appropriate
- involve widespread sharing of best practice, expertise and creative ideas to achieve maximum benefits to the system
- do not require direct endorsement of products or services

3. Operational definitions

To assist with clarity of communications the following definitions are used:

advertisements: the provision of advertising space on behalf of a commercial concern in exchange for revenue or goods in kind (e.g. yearbook ads). This should not be confused with the display of corporate logos as sponsorship recognition.

capital projects: Capital Projects are larger in scale and usually involve construction –such as an auditorium, theatre or pool.

capital-related: Capital-related items are those which are smaller in scale and include computers, creative playgrounds, street signs, furniture, etc.

donation: a gift of funds, equipment, materials or services which may involve the provision of a charitable donation receipt as appropriate.

fundraising: the acquisition of resources from other than Grand Erie District School Board sources. These include proceeds from sales of various items (e.g. food, materials) donations (e.g. money, equipment) or advertisements (e.g. yearbook).

partnership: the collaborative effort of schools, community, and businesses to prepare students to function productively in society as workers, consumers, citizens and lifelong learners through the exchange of human, intellectual and/or material resources to the mutual benefit of all involved.

school-generated funds: all revenues and assets acquired by schools from other than school board budgets. These are still subject to audit and there is full accountability for disposition.

sponsorship: the provision of funds, price reductions, equipment, materials or services in exchange for some form of exclusivity and/or product recognition for a specified period of time. This might include cross promotions. (e.g., chocolate bar sales).

viability review: Viability Review is a defined process for determining approval of Capital Projects as outlined in Section 4.2.

4. Procedures

4.1. Capital-related Fundraising:

4.1.1. Capital-related or small-scale capital fundraising would include items such as computers, furniture, playgrounds or street signage. In such cases, fundraising is performed by a school council in consultation with the school principal. In addition to the fundraising guidelines and principles in Policy SO1, Fundraising, the school principal needs to ensure that system standards and requirements are met. These include:

4.1.1.1. Computers and Computer Equipment — the fundraising/donation must provide equipment that meets the current Grand Erie District School Board technical standard for information technology.

4.1.1.2. Creative Playgrounds — all playground equipment donations must meet the criteria defined in FT 105 Playground Equipment Administrative Procedures.

4.1.1.3. School Signage — The Grand Erie District School Board Visual Identity standards as set out in Policy SO25 must be adhered to for display signs, illuminated signage, etc., and must be pre-approved by the Manager of Facility Services to ensure construction requirements, signage standards and municipal bylaw requirements are met.

4.2. Capital Project Fundraising

4.2.1. Capital Project fundraising, or larger-scale fundraising, would generally involve construction of an item such as an auditorium, theatre or portable. If a group—such as a School Council—wishes to fundraise for a capital project, on its own or at the request of the Board, there are additional considerations. In these cases:

4.2.1.1. If a school council or other group/organization has an interest in capital project fundraising, they should begin with the previously identified capital needs

congruent with the multi-year plan of the Grand Erie District School Board. This is the preferred starting point. This should begin with a discussion with a school principal and superintendent of education and local trustee(s) to determine the recommended course of action for capital project fundraising.

- 4.2.1.2. Any group or individual with a capital project proposal then needs to bring the proposal for consultation to the superintendent of education, school principal, school council and local trustee(s). Depending on the proposal, there may need to be consultation with the parent community beyond the school council.
- 4.2.1.3. If supported, the capital project proposal would then be referred by the superintendent of education for a review, in terms of viability, by Planning and Facility Services in consultation with other Service areas such as Business Services and School Program
- 4.2.1.4. A Viability Review will be conducted by the appropriate Superintendent of Education, the Superintendent of Business and other senior administration as determined by the scope of the project and related donation. The Viability Review will include examination of the Capital Plan to identify if the proposed construction is already planned and funded, whether fundraising for the project would free-up funds to use for other capital projects, any implications on capital funding from the Ministry of Education, and alignment with Grand Erie District School Board and Ministry of Education curriculum priorities. The review would also measure the value of the fundraising compared to the staff time required to implement the project. A timeline for review would be established at the beginning of the process.
- 4.2.1.5. For all capital projects, the Viability Review will include careful examination of the long-term impact of the project such as utility costs, costs of maintenance, enrolment projections, and the condition of the existing structure.
- 4.2.1.6. The Viability Review will either recommend or not recommend that the project progress. If the recommendation is for the project to progress, the Superintendent of Education will bring a report to Executive Council that provides an overview of the project and also addresses issues such as school-to-school equity.
- 4.2.1.7. There may be times when such a project will also be taken to the Ministry of Education for review/approval.
- 4.2.1.8. There may be specific proposals which will require consultation with the broader community –such as installation of outdoor lighting.
- 4.2.1.9. Should a project be approved, it must comply with existing Grand Erie District School Board policies and procedures as well as Ministry of Education Regulations and directives including procurement regulations for tendering and purchase, conflict of interest, fundraising and financial management, construction standards and health and safety requirements.

5. Approval and Agreement

- 5.1. Prior approval by the principal is required for fundraising activities within the school community, and by the Superintendent of Education for activities beyond the school community.
- 5.2. Senior administration and Board of Trustees approval is required for any region-wide fund raising activities or campaigns for funds by outside organizations
- 5.3. Board of Trustees approval is required for all capital projects funded by donations above \$50,000 in a year.
- 5.4. If approved, capital projects will require a written agreement to proceed. The agreement would cover such areas as collection and holding of funds, the process for tax receipts, long-term maintenance and operation issues, etc.
- 5.5. All funds would need to be raised and in place before the design and construction process begins.
- 5.6. The agreement would reinforce that the Grand Erie District School Board retains governance over decision making, design and construction details and that all capital construction, once completed, remain the property of the Grand Erie District School Board.

6. Reporting

- 6.1. A full report on the project outcomes including funds raised and project expenditures will be provided to the Board upon completion of the approved project. Interim reports will be provided annually, in June for approved projects that span more than one school year.

Related Resources:

- Grand Erie DSB multi-year plan.
- SO1 Fundraising Policy
- SO4 Advertising and Material Distribution in Schools
- SO8 Community Partnerships
- FT1 Major Construction Projects
- FT105 Playground Equipment