



# Fundraising

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Projected Review Date: 2023

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## PURPOSE:

Hamilton-Wentworth District School Board (HWDSB) recognizes that parents, guardians, caregivers, schools and communities may choose to engage in fundraising activities to support students, schools, the Board and the wider community. The Board believes that fundraising activities must be complementary to public education, voluntary, safe, accountable and transparent.

The Board is supportive of fundraising activities that increase student engagement, support a healthy learning environment and build strong partnerships.

## GUIDING PRINCIPLES:

- HWDSB believes that fundraising should support the values and expectations of the school community including those of parents, students, staff and trustees.
- HWDSB believes in being transparent and accountable to the community.
- Fundraising must be ethical and legal.
- Staff and volunteers co-ordinating fundraising activities should be supported to ensure proper handling and management of the proceeds raised from fundraising events and any expenditures incurred in the provision of the fundraising event.
- Fundraising will not be used to replace items that are publicly funded, such as classroom learning materials, textbooks, facility repairs, maintenance or upgrades.

## INTENDED OUTCOMES:

Fundraising activities in Hamilton-Wentworth District School Board will:

- 1) Be complementary to publicly funded education.
  - Fundraising will reflect HWDSB's mission, vision, values, strategic directions and policies.
  - Fundraising will reflect the purposes and the principles of public education, including equity, diversity, and accessibility.
  - Fundraising will support student achievement and well-being and will not detract from the learning environment.
  - Fundraising will not replace public funding for education, and may not be used to support items that are funded through provincial grants such as classroom learning materials and textbooks, facility repairs, maintenance or upgrades.
  - Fundraising will not support those capital projects that will result in an increase in the student capacity of a school or significantly increase capital or operating costs.



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- Fundraising may be used to support humanitarian or charitable causes that can increase student understanding, empathy and activism in helping to address local, national and international issues.
  - Fundraising may be used to increase community and parent/guardian/caregiver engagement with the school.
- 2) Be voluntary
- No individuals will be compelled to participate in fundraising activities, nor will a student's fundraising efforts be tied to any measure of student achievement, or be subjected to any other negative consequences should they choose not to participate.
  - Fundraising by the local school community will reflect the diversity, values and priorities of the Board and the community.
  - Privacy will be respected. Personal information of staff, students or other individuals will not be shared for the purposes of fundraising without prior consent.
- 3) Provide a safe environment for students, staff and volunteers
- The safety of students will be a primary consideration in all fundraising activities.
  - All fundraising activities require supervision by an HWDSB employee and should be age-appropriate.
  - Appropriate safeguards will be in place regarding collection, deposit, recording and use of funds.
- 4) Be accountable and transparent
- Appropriate documentation will be completed for expenditures incurred during the provision of the fundraising event as well as when spending the proceeds.
  - School fundraising activities will be developed and organized with advice and assistance from the school community.
  - Fundraising has a designated purpose and the proceeds are used for that purpose.
  - School fundraising will include transparent financial reporting practices to the school community.
  - System fundraising will include transparent financial reporting practices to HWDSB community.
  - There shall be no real or perceived conflict of interest in any fundraising activity.
  - All fundraising, including fundraising led by student groups (e.g. school council, clubs, athletics, etc.), Ontario Home and School Associations, Alumni Associations, or other school community groups must be supervised by a HWDSB employee, be age-appropriate and be governed by the same rules as other fundraising activities.



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- Administrative expenses associated with the fundraising activity will be minimized.
- All organizations in receipt of HWDSB fundraising proceeds must engage in legal and ethical practices.

## RESPONSIBILITY:

Director of Education  
Members of Executive Council

## TERMINOLOGY:

*Capital Projects:* Capital projects supported by fundraising should enhance the facilities that already exist in the school or school yard and do not include school renewal, maintenance or upgrades to the facilities such as structural or emergency repairs or replacement of flooring, tiles etc. Examples of supported capital projects include playground equipment, shade structures, and scoreboards with approval.

*Fundraising:* Any activity, permitted under HWDSB's policies, to raise money or other resources, as approved by the school principal, in consultation with, and upon the advice of the school council, and/or a school fundraising organization operating in the name of the school, and for which the school provides the administrative processes for collection. Such activities may take place on or off school property.

*School Community:* Refers to students, parents, guardians and caregivers, school councils, trustees, school administrators, staff, members of the broader community and partners, as well as others, who support HWDSB and student achievement.

*School-Generated Funds:* Funds that are raised and collected in the school or broader community in the name of the school, by school councils or other school or parent administered groups (with the exception of funds raised by the Ontario Home and School Associations).

School generated funds are administered by the school principal and are raised or collected from sources other than HWDSB's operating and capital budgets. These sources include proceeds from fundraising activities, fees for supplementary learning materials and activities, athletics/clubs, educational excursions, and donations for initiatives such as a school nutrition program.

School generated funds is a broad category which includes not only fundraising for school purposes, but also all funds that are collected and paid out through school accounts to support a variety of programs such as payments to charities or other third parties.

*Ontario Home and School Associations:* Refers to entities separate from District School Boards when they are constituted under the umbrella of the Ontario Federation of Home and School Associations. They may engage in fundraising activities to support the goals and objectives of their organization.



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The proceeds from these activities are not a part of School Generated Funds.

When Home and School Associations are purchasing equipment for a school, all purchases must follow procurement and facility policies and procedures.

## ACTION REQUIRED:

- Yearly monitoring through an internal and any mandated external audits that monitor all fundraising activities, and fundraising procedures to ensure that they meet the Ministry and HWDSB purpose and intended outcomes.
- Each school principal, with advice from the School Council, will identify an Annual School Fundraising Plan for funds to be generated in the name of or under the auspices of the school. The Annual School Fundraising Plan is a means of monitoring, communicating and documenting a school's fundraising initiatives. The school's Annual School Fundraising Plan must be signed by the Principal and submitted to the Superintendent of Student Achievement for final approval.
- The school principal will approve all fundraising activities in advance, including the intended use of funds.
- The school principal will be accountable for ensuring transparency of all funds raised and for providing disclosure to the appropriate group(s).
- Fundraising activities need to comply with related Board policies and procedures, including but not limited to Health and Safety, Purchasing, Conflict of Interest, Equity, Environment, Nutrition, and Educational Excursions.
- Fundraising for schools by School Councils is a partnership between the school, the Board and the fundraising group. Because the Board is a corporate entity and the school is not, any funds raised by the School Council (and any assets purchased with those funds) belongs, legally, to the Board.
- The Hamilton Foundation for Student Success has been established to support students in financial need. The Hamilton Foundation for Student Success supports equity of opportunity and access, maintaining recipient confidentiality and dignity, when support is required beyond that available at the school level. The Hamilton Foundation for Student Success is sustained through external funding.
- Limits may be set on the number and extent of fundraising activities in each school.



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## PROGRESS INDICATORS:

Intended Outcome	Assessment
Be complementary to publicly funded education	Each school will have a Superintendent approved Annual School Fundraising Plan, which includes fundraising suggestions and how the revenue from the fundraising will be spent.
Provide a safe environment for students, staff and volunteers	The school community will be informed as to how proceeds from fundraising and corporate donations are used and ensure this is aligned with the designated purpose of the funds raised.
Be accountable and transparent	<p>At the end of the school year, each school will prepare an annual financial summary report on school-generated funds which includes fundraising revenues and expenses incurred in conjunction with the fundraising activity or event. Audits will be performed annually on a sample of schools by the external auditors and central Board staff.</p> <p>The school community will be informed as to how proceeds from fundraising and corporate donations are used and ensure this is aligned with the designated purpose of the funds raised.</p> <p>School councils will report annually to the Principal and the Board on their fundraising activities.</p>

## REFERENCES:

### Government Documents

Education Act  
 Ministry of Education Fundraising Guideline  
 Municipal Freedom of Information and Protection of Privacy Act  
 Broader Public Sector Procurement Directive  
 Equity and Inclusive Education Strategy  
 Facility Partnerships Guideline  
 School Food and Beverage Policy

### HWDSB Policies

Community Engagement



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- Equity and Inclusive Education
- Nutrition
- Procurement
- Use of Board Facilities