Fundraising Permission Request Form Instructions

1. Review the list of approved fundraising vendors (if conducting a sale) to make sure that they have been previously approved by administration. Prior to approving vendors, we check references and ensure a minimum of 30% profit to the District. Fundraisers where the organization gets a percentage of a restaurant’s sales for a particular day do not need to be an approved fundraiser as we are not selling anything and it is really more of a donation to the District. For those types of situations, a Daily Deposit Summary can be used to report the collection. Do not use a Fundraising Permission Request Form.

2. This form must be completed and submitted at least two weeks before the fundraising activity. This is to provide sufficient time for processing and approving the fundraiser request.

3. The Sponsor needs to be the person to fill out this fundraising form, not merely a signer of the form. The form needs to be completed in its entirety.

4. Ensure the “Date Range” of the fundraiser is accurate. This will determine when your fundraising recap will be due. If this date needs to be modified at a later date, the previously approved Fundraising Permission Request Form will need to be modified to reflect the change. The campus sponsor, campus secretary/bookkeeper, and campus principal must initial next to the change and then the revised form will need to be sent to the Business Services Department. The form will need to be clearly indicated as “Revised”.

5. Ensure the “Time of Day” and “Location(s)” fields are complete. We use this information to determine whether or not a food or candy sale can be approved or not. All fundraisers involving food and/or candy sales are required to be approved by the District’s Child Nutrition Director.

6. The “Estimated Revenue” and “Estimated Expenses” need to be based on your realistic expectations for this fundraiser. Do not overstate your “Estimated Revenue”.

7. The budget codes entered must be correct. These are the codes where your revenue will be posted once your recap has been reconciled. If you utilize campus activity funds (461 Funds) you need to indicate both your revenue and expenditure code. If you utilize student activity funds (865 Funds) you only need to indicate your one account number.

8. Do you require an advance in order to buy the items for resale? If you have money in your account sufficient enough to cover the purchase, then DO NOT request an advance. You can use your existing funds. If you do not have a sufficient balance in order to order the items for resale, you may request an advance. Be realistic in the amount of the advance you are requesting. It cannot exceed the estimated expenses for the fundraiser. Be mindful that the advance will be deducted from your revenue when the fundraiser is reconciled at the end. If you do not raise enough funds to cover your advance, you may be faced with a negative account balance situation.

9. You must indicate on this form whether or not the items that you are selling are taxable. Please read the student activity fund handbook for detailed information on sales tax and what type of sales are subject to sales tax. Even if you sell t-shirts to students at cost, those sales are subject to sales tax. If you do not collect sufficient funds to cover the sales tax for those t-shirts, your account will be faced with an expenditure that you did not anticipate, which could cause your account to have a shortage. Indicate if this will be one of your tax free days and if the vendor will be collecting and remitting sales tax on behalf of the District.

10. The Sponsor must carefully read and sign the Sponsor’s certification section.
11. If this is an athletic fundraiser, the form needs to be routed to Coach Tusa for his approval. Once his approval is obtained, it can be submitted for campus approval.

12. The Form must be signed by the campus secretary/bookkeeper. This will put that person on notice that there may be a requirement for a requisition to be entered and that they can anticipate daily deposits from the sponsor.

13. The Form must be signed by the campus Principal. This is required to approve the fundraising activity for the campus and to approve any advance requested for the fundraiser.

14. At this point the form must be routed to the Business Services Department for review and processing. If the Child Nutrition Director’s approval is needed, the Business Services Department will route the form for the proper approval.

15. The Business Services Department will log in the Fundraiser and assign an ID# to the fundraiser. This fundraiser ID# will need to be referenced on the fundraising recap and Daily Deposit Summary forms. It is also good practice for this number to be placed on receipts provided to the Sponsor by the campus secretary/bookkeeper.

16. Once approved/denied, the Fundraising Permission Request will be returned via email to the campus secretary/bookkeeper, campus principal, and fundraising sponsor.

17. The Sponsor must not order merchandise for this fundraiser without the completed and approved Fundraising Permission Request Form. A purchase order MUST be obtained in advance of placing the order for merchandise. If additional product must be reordered at a later date, an ADDITIONAL purchase order must be obtained before additional product is ordered.

18. Issue receipts to students when they turn in funds.

19. Collections must be remitted on a timely basis by the Sponsor to the campus secretary/bookkeeper. Do not wait until the fundraiser is complete before turning in funds. The Daily Deposit Summary form must be submitted with the collections to the campus secretary/bookkeeper on a daily basis. Funds must be counted in the presence of both the sponsor and the campus secretary/bookkeeper. The campus secretary/bookkeeper will then issue a receipt to the Sponsor. The sponsor must keep this receipt.

20. The Sponsor is then responsible for submitting a completed Fundraising Recap form to the Business Services Department within seven business days of the end of the fundraiser.