

**Lincoln Academy
Fundraising
Procedure**

Revised
December 2007
February 2009
December 2009
March 2010

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 LAPTO 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 LAPTO Board as soon as possible, preferably before a LAPTO Board meeting 1-2 months before the start of the proposed fundraiser.
- C. For more detailed instructions, see sections V. A., VI. A., and VII. 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 two Inside School fundraisers.
 - 4. Middle School students earning funds for the science or Washington D.C. trips are allowed to have three 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 two Outside School or Community fundraisers.
 - 4. Middle School students earning funds for the science or Washington D.C. trips are allowed to have three or more Outside School or Community fundraisers as approved by the Administration and the LAPTO 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 LAPTO 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 LAPTO Board no later than the day before a LAPTO 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 fundraising events.
- 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, LAPTO Treasurer, and/or the Lincoln Academy 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.

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 LAPTO Board and Administration before presentation at the April LAPTO meeting in the school year prior to the start of fundraising.

B. Funds

- 1. Funds may be designated by the parent of an enrolled Lincoln Academy 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 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 LAPTO Board and Administration before presentation at the January LAPTO 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 LAPTO Board as stated in section VII. A. 1. above:
 - a. Proposals for Inside School Fundraisers must be submitted in writing to Administration and the LAPTO 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 LAPTO 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. Funds raised 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, funds raised will be forfeited to a "general fund" which will be used for trip scholarships or divided evenly among remaining 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 _____