

## **GUIDE FOR FUNDRAISING SOCIETIES**

To the Parent Society or Potential Parent Society:

At EIPS, we are committed to providing high-quality education and engaging opportunities for our students. In meeting this commitment, EIPS welcomes collaboration with our parents – the key influence in a child’s life. This partnership plays a valuable role in meeting the needs of students and ultimately leading them to success.

One component of the most successful models for parent collaboration and contribution is a school fundraising society. These societies can raise funds for supplies, equipment and extracurriculars that would not otherwise be possible for a school to obtain. Planning fundraising events make a connection between school and community.

The relationship between a fundraising society and a school is one of true collaboration.

On one hand, the society is its own separate legal entity. The society controls its own finances, including purchases and disbursements of funds, and plans its own events. The society can apply for public grants in their society name and is required to submit an annual return to the provincial registry. In this sense, a fundraising society can be considered independent from a school.

However, much of what leads a fundraising society to success is within the realm of control of the school. EIPS has control over who uses school names, whether that be in the legal name of a Society, or in advertising for an event. The use of school buildings, staff, and other resources are also handled by the school, as is what information is distributed directly to our parents through school channels. Finally, a school always has the choice of what donations they ultimately accept, what programming they run, and what events they support.

School fundraising societies are always appreciated, but without proper planning, there can be unexpected challenges. A school is balancing the needs of all students, whereas a fundraising society can often be focused on a particular group of students or specific program, such as band or football. Also, a fundraising society may be unaware of inherent limitations of working with a school board – where decisions related to areas such as purchasing or programming are often dictated by legislation or health and safety requirements.

In acknowledgement of the benefits provided by a fundraising society as well as potential challenges, EIPS has developed an *EIPS Guide for Fundraising Societies*. This guide is meant to be proactive and preventative, in belief that the guidelines and best practices outlined will set the stage for a positive, long-term relationship between a school and Society. Some of the areas outlined in the guide are:

- Setting up a new society – what commitment is required, other considerations, and alternatives
- Working with your school – planning activities and purchases in advance, and agreeing on expectations
- Administrative responsibilities - advice on budgeting, tracking funds, and insurance

As you embark on your fundraising planning for the school year, please review the guide in detail and ensure that you feel comfortable with its contents. Your school principal is an excellent resource should you have any questions or concerns.

Together, we can ensure a successful relationship, and provide great benefits to our student body for years to come.

Sincerely,



Mark Liguori  
Superintendent



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## SOCIETY BASICS

### Is a society necessary?

#### Benefits of creating a fundraising society:

- Fundraising societies are a legal entity (unlike school councils or informal parent groups), and therefore can undertake fundraising endeavors that require a gaming license from the Alberta Gaming and Liquor Commission (AGLC), such as bingos, casinos or raffles.
- Being a legal entity may also allow a fundraising society to apply for more grants as some require the applicants to be a legal entity.
- If the school council is currently undertaking these activities, having a separate fundraising society would allow the school council to focus on its main objective: allowing members of the school community to advise and consult with the school board on educational matters.
  - A school council's primary goal should not be ongoing fundraising or major fundraising campaign endeavors. More information on this in the following section.
- Fundraising societies do meaningful work and provide an excellent space for parents who want to get involved and go above and beyond for their school.

#### The drawbacks of creating a fundraising society:

- A fundraising society requires a time and effort for set up and maintenance.
  - There's a provincial application process that takes time.
  - A society must create bylaws and follow them – minute taking, financial reporting, governance, etc..
  - Typically, a fundraising society must maintain their own bank account and follow financial best practices in doing so (regular bank reconciliations, specified signing authority, etc.).
  - Societies have specific annual provincial reporting requirements that school administration cannot typically assist with.
    - financial reporting
    - specific record retention requirements

Not completing these requirements can result in the society losing its standing and puts grants, etc. at risk.

- More effort needs to be put into transition planning when parents join/leave the society as records for the society are critical and require reporting.
- Typically, if a society is running events, they are required to have liability insurance and/or WCB coverage to ensure coverage if an injury happens at one of their events. Even if the event is happening at the school, the fundraising society would be liable if an injury happened. They

may also want financial liability insurance to cover theft, etc. depending on their situation. Obtaining and maintaining insurance coverage takes time and effort on the society's part.

- There are monetary costs – the liability insurance mentioned above, application fee to become a society, WCB coverage and bank account fees. The society would need to ensure they raise enough funds to cover these costs.

### Charitable Status

Fundraising societies are not charities. They cannot issue charitable donation tax receipts. Setting up a charity registered with the Canada Revenue Agency is significantly more work than becoming a society and is not covered in this guide.

If a donor wants a charitable donation tax receipt, they will need to donate funds directly to the school (not through the fundraising society) and EIPS can provide a receipt.

### Alternatives

If a fundraising society is not the best fit for a school, but there are still some specific, desired fundraising activities. Alternatives are to:

- Have the fundraising activity run by school council (see more info on this in the next section). Generally, this would be small-scale and often one-time activities.
- Have the fundraising activity run by the school itself, with parent volunteers. This would require more commitment from school administration and would have limitations related to AGLC activities (casinos). This eliminates the concern about liability and the need for insurance as the Division's liability insurance would cover this activity.

Regardless of how fundraising activities are structured at a school, both school councils and fundraising societies should work closely with their school administration and follow relevant school policies.

## Difference between school council and fundraising society

**School councils** were legislated in 1995 under *Alberta's Education Act* (formerly the *School Act*) and are mandatory for all schools in the public education system, including charter schools.

School councils are structured groups of parents, principals, teachers, secondary students and community representatives who work together to effectively support and enhance student learning. They provide a means for members of the school community to consult and provide advice to the principal and the school board.

A **society** is an independent legal entity, existing separate and apart from its members. Societies are similar to non-profit organizations and must direct profits back into fulfilling the objectives of the society.

School councils and fundraising associations provide two separate and distinct contexts for parent and community involvement in the school.

School councils provide a means for parents and community to work together with administration, staff and high school students to promote the well-being and overall effectiveness of the school community.

**Their main role is advisory.**

Fundraising societies provide a means for parents and community members to provide additional financial resources and support to the school. **Their main role is fundraising.** Members who serve on a school council can also serve on a fundraising association, and vice versa, unless the operating procedures/bylaws of either organization prohibit it. Fundraising associations are responsible for reporting on their activities and fall within the statutes of the *Societies Act*, Alberta Corporate Registry and Alberta Gaming and Liquor Commission, depending on the group's fundraising activities.

## Society focus

It's important fundraising societies have a clear focus, or a mission statement, which will undoubtedly be part of the set of bylaws established by the society. It is easy to lose sight of the societal focus for specific event planning and volume of events planned, which is why the society was originally established. Keeping this in mind and perhaps reviewing the mission and intention of the society as part of the annual general meeting would be beneficial.

## Guidance on starting a society

The Alberta website link below provides a step-by-step guide when forming a society:

<https://www.alberta.ca/incorporate-a-society.aspx#jumplinks-1>

Step 1 – Choose a name

Step 2 – Get a NUANS report: You need to get an Alberta NUANS report and review it to make sure there is no other society with an identical name. Identically named societies are not allowed. You will also need to decide if your proposed name is too similar to other incorporated names.

Step 3 – Fill out the forms: The following PDF links are forms required to be completed when forming a Society in Alberta.

- Application to Form a society: <https://cfr.forms.gov.ab.ca/Form/REG3088.pdf>
- Society Bylaws: <https://www.alberta.ca/assets/documents/sa-society-bylaws-form.pdf>
- Notice of Address for Societies: <https://cfr.forms.gov.ab.ca/Form/REG0022.pdf>
- Notice of Directors for a Society: <https://cfr.forms.gov.ab.ca/Form/REG12362.pdf>

- Service Request: <https://www.alberta.ca/assets/documents/sa-request-for-services-form.pdf>

Step 4 – Submit signed duplicates of your completed forms, the NUANS report, and the \$50 incorporation fee payable to the Government of Alberta.

Corporate Registries will enter the information into the system and mail a certificate of incorporation.

**Additional steps:**

**Get a society bank account.** Funds (cheques, cash, or direct deposit) should never go into a personal account or accounts of those involved, they should be deposited to an account in the legal name of that society only.

## PLANNING EVENTS

### General Guidelines

When planning events, it's important the following are addressed:

1. What is the fundraising for?
2. What is the goal amount of the fundraiser?
3. What happens if end results are below the goal amount? What if results are above the goal amount?
4. What is the timeline for this event? When it will take place, how long will the fundraising continue? This includes all logistics for running the fundraiser.
5. How will the donation be made to the school (see the Making Donations and Purchases section on page 7)?

These will require coordination with your school principal **as you plan**. Ultimately, you will want a final fundraising plan signed off by the principal and the fundraising society prior to the start of the fundraising campaign. A sample plan is included in the Appendix.

Your principal or their representative will be able to provide information such as:

- Is the timeline appropriate for the school? Are there other fundraising events going on at the school at that time (Terry Fox Run, Jump Rope for Heart, etc.) that might conflict? Are there other fundraising societies (like band, football) and have they had opportunities to run events yet?
- Is the items/programming you are fundraising for needed by the school?
  - Often, a principal can provide a wish list of items that would be beneficial for the school.
  - Some items may be logistically challenging for a school to accept. For example, a fundraising society may want to fundraise for an indoor climbing wall. However, this would require much consultation with the school – is there an acceptable wall to support a climbing structure? Is it safe for students in that area? How does it get cleaned regularly? For these reasons, it's always best to establish a specific fundraising goal in coordination with the principal before fundraising begins.
- What resources are needed at the school level and are they available?
  - Staff, gym space, photocopying, newsletter space?

Making the most of a school fundraiser requires careful planning and execution. Below are some best practices for any school fundraising idea:

1. **Identify specific goals.** As mentioned above, a fundraising society needs to coordinate with school administration and identify a fundraising goal. Donors also like to know where their money is going, and generally more specific fundraisers are more successful. It's also important to align your fundraising methods with the amount of funds you need. Start by identifying the



specific needs the fundraiser will be supporting, whether it's buying new computers or funding a school trip.

2. **Align school fundraising ideas with your goals.** Once you've determined your fundraising goals, choose school fundraising ideas that will help you meet those goals.
3. **Form a planning committee.** Your fundraising body likely has many fundraising projects to manage throughout the year. It's important to decide who will be working on what project and when. Within each committee, assign roles and responsibilities carefully so that everyone knows their part.
4. **Determine how you will promote the fundraiser.** With all the volunteer hours and resources that go into a successful school fundraiser, it's crucial to make sure people know about it so you can reap the benefits. Have a plan in place for how you will get the word out about your campaign, including brochures, social media, etc.
5. **Evaluate the success of the fundraiser.** The best way to improve your school fundraiser is to evaluate the successes and failures of past campaigns. After each fundraiser, have the planning committee discuss what worked well and what didn't and record these discussions for future planning.

## Planning Event Logistics

Event logistics or general event management refers to the delegation of the strategic planning of your event. It is the big picture. Establishing the right logistical plan assures that these crucial details are effectively managed, which allows you to produce a safe and effective event. Examples of such important logistics details are:

- **Costs/budgeting for the event** – This is vital information. Your budget will heavily influence event logistics. You should estimate costs in advance to ensure your event will be successful. How much do you need to fundraise in order to break even on the event?
- **Location of the event** – You should decide on the date and venue for your fundraiser in advance (recommend at least three months) to give you plenty of time to organize the rest of the event and start promoting it to your target audience. When choosing dates, consider days and times which will work better for your potential attendees.
  - **Important:** if a school facility is going to be used after school hours, bookings must be made through EIPS Facility Rental Services ([facility.rentals@eips.ca](mailto:facility.rentals@eips.ca)) or submitting a rental request form on the EIPS website. Depending on the event, timing, length, etc., there may be additional fees for insurance coverage and custodial services for your event.
- **Promotion of the event** - It's vital to get the word out in the best ways possible for your specific audience as opposed to trying to cover every channel. Email, content marketing, advertising, social media. They are all different ways to reach out to your donors and let them know about your event. The thing to keep in mind is whichever and however many

channels you use to market your fundraiser, you need to ensure the messaging across all channels gel together. This doesn't mean they have to be the same message, but the tone of voice and wording should be similar.

- It should be clear in your promotion of the event that it is being run by a fundraising society, not by the school itself.
- **Staffing/volunteers for the event** - Once you define how you plan to use volunteers, the next step is to determine what you expect the volunteers to accomplish. How will you recruit/attract volunteers?
- **Safekeeping of funds raised** - Handling cash donations requires suitable methods for counting and cashing up the money correctly. As cash collections are often not banked immediately, this makes them a less secure form of donation. Online giving, on the other hand, is processed using a secure payment gateway. Likewise for cashless payments using contactless cards or mobile payments like Apple Pay. Beyond security and ease of processing, relying on cash donations might also jeopardize your chance of maximizing your fundraising efforts. For your fundraising event, if you want to collect the most amount of funds as possible outside of your ticket sales, your collection methods need to match the shift towards cashless payments. Select fundraising devices that allow you to raise these additional funds on the day of your event.
- **Insurance and liability considerations** – Societies are liable for injuries that may occur at a fundraising event, even if it takes place at a school. It takes time to acquire insurance and fundraising societies need to plan in advance to obtain necessary insurance. The type of event that a fundraising society has, may or may not be covered by insurance and this will need to be reviewed with the insurance company. An event like a 'fun run' may have more injury risk than a bake sale, and insurance coverage may look different or cost different for both events. Other events – like something including archery – may not be allowable at all.

## Final Fundraising Plan

A well-formed and documented plan is the first stage in a successful fundraising event. A written plan documents and summarizes all conversations the fundraising society has undertaken, and ensures everyone—the society and school administration, importantly—are on the same page.

**This plan should be finalized and signed off before the fundraising campaign begins.**

A sample plan is included as an attachment to this guide.

## MAKING DONATIONS AND PURCHASES

### Considerations

There are specific considerations to be made in determining whether to donate items versus funds to a cause. **Generally, the recommendation is to donate funds (money via cheque typically) to the school, rather than having the fundraising society purchase the items.** Some of the considerations leading to this recommendation are:

- **GST** – The school’s GST/rebate status allows them to claim a certain rebate of the sales tax on GST applicable items purchased with funds donated. This, in turn, leaves more fundraising dollars for items needed (i.e. it costs less). Whereas, if an item is purchased by the society and then donated, the society must pay full GST with no rebate.
- **Purchase cost savings** – EIPS has the advantage of purchasing power and preferred customer rates with certain suppliers. This should be considered when donating funds or items to the school/cause the fundraising was done for.
- **Compatibility** – Items donated might not be compatible with existing technology or facilities, or with administrative procedures and processes in place. An item not compatible could potentially be of little to no value and may not be accepted as a donation at all. For example, only certain computers are useful for student computers, as there is infrastructure (security, training, etc.) already in place for these computers. If another type of computer is purchased, the setup and new infrastructure requirements would quickly deplete the usefulness of that donation.
- **Long term maintenance** – It is important that if funds donated are going to the purchase of specific property or equipment; that it is discussed ahead of time between all parties what the maintenance costs and timelines are, if any. All involved parties should be aware of future cost and time obligations the donated funds or property might impose upon them. For example, funds raised for a sports facility donation; all long-term repairs, maintenance and utilities obligations need to be transparent and openly discussed prior to the donation being made. Generally, these repairs and maintenance falls to the school as they own the asset. If they cannot maintain the asset over time, it may not be the best use of fundraising monies.
- **Legislated requirements and ethical purchasing** – If a fundraising society decides to purchase the item, they shall follow the Division procurement principles:
  - Procurement shall be conducted with the objective of obtaining the best value for the Division taking into consideration such criteria as price, total cost of ownership,

- product or service quality, bid compliancy, supplier qualifications, experience and reputation.
- Procurement shall be conducted in an open, fair, non-discriminatory, and transparent manner, and where legislation and/or Division Administrative Procedures dictate, follow a competitive procurement process.
  - Individuals participating in procurements on behalf of the Division shall conduct themselves in an ethical manner. Division staff cannot sell products, equipment or services to the Division either as an individual, in a partnership or as a corporation without approval from the Superintendent.
  - Whether it's donated products, services, or time; contracting and purchasing activities must be fair, open, and transparent and conducted with a view to obtaining the best value for public money. All participants must ensure public sector resources are used in a responsible and effective manner.
- **Warranties, disputes over quality** – Division staff are experienced in handling disputes over product or service quality. To assist with this, generally the Division needs to be the one making the original purchase. In addition, there tends to be more continuity with Division staff. If a warranty issue arises 1+ years after the original purchase, the fundraising society may have different representatives who aren't knowledgeable about the original purchase.

## Ownership of Assets

**It's important to note that all items or monies donated to the school become school property (EIPS property). This allows long-term flexibility for the school and accurately represents who has the burden of ownership (maintenance, etc.).** Therefore, it is very important that all parties are aware of the implications of what is donated or what is to be purchased with donated funds.

## BUDGETING, INSURANCE AND OTHER ADMINISTRATIVE ITEMS

### Documenting your meetings

Every meeting must be well documented through formal minutes (written records of the meeting). This will be useful when referring to attendance at a meeting, what was discussed and any decisions that were made at the time. They can also assist in transition planning for societal members.

It is important to document the following:

- Date, time and location
- Participants of meeting
- Absent members of a meeting
- A meeting summary containing approval of agenda, listing of topics and conclusions or actions required
- The next scheduled meeting to take place and notes pertaining to planned agenda thereof
- Adjournment time details

### Developing an event budget

Prepare an event budget **in advance** to ensure costs are covered by fundraising proceeds and the event be an overall financial success.

Unless a sponsor has agreed to cover all expenses, your event will cost money to plan. The categories that will cost money can include:

- Promotion and advertising, which include invitations, posters, postage, and photography
- Insurance: for instance, you need liability insurance in case a person gets hurt.
- Décor such as flowers, chairs, and tables.
- Supplies, such as food costs.
- Office expenses: mailing list, website managements, and letter writing.
- Location and venue: portable toilets, space rental, and tents.

A Profit and Loss Statement is a list of event revenues (donations, ticket sales, sponsorships, auction revenue, raffles, etc.) minus any event costs (venue, catering, bar fees, consultants, auctioneers, entertainment, technology, etc.). If your revenues exceed your costs, then you have a profit. Otherwise, it is considered a loss (our goal is to avoid that from happening).

Focus on estimating your profit and loss statement as you start to plan and consider the event. Look online to find estimated costs for similar items if you do not know final costs yet. Estimate how much fundraising revenue you will bring in – will it be enough to make this event worth the time and effort?

Some suggestions:

- Design an event that generates income in several ways. For instance, if you are staging a rummage sale, also think about selling baked goods. Some of the most common sources of income include:
  - Table sales
  - Individual ticket sales
  - Sponsor, benefactor and patron donations
  - Food and beverage sales
  - Advertising/promotion sales
  - Sale of goods and services
- If you find that you cannot raise enough money during the event, consider using online fundraising platforms.
- Actively seek out sponsors. It does not have to be a cash donation – grocery stores can donate supplies, etc. for a bake sale. You can offer to display a poster indicating they are a donor when the bake sale happens.
- Brainstorm expected costs as a group (or finalize as a group). There are many costs to consider and it's often hard for one person to remember every potential expense. Having this discussion as a group will also solidify the event plan ("Are we providing popcorn at the family movie night?" "How are we renting and transporting the popcorn machine?").
- Don't forget to add GST and other administrative costs. Bank account fees, insurance costs, etc. are not huge dollars, but will need to be built into your plan somewhere (otherwise, how would they be paid for?).

## Cash and payment best practices

While many donations and event sales are made using credit cards and cheques, cash remains a popular form of payment at fundraising events.

To better ensure the proper handling of cash receipts during events and activities, organizations should provide volunteers with a detailed list of cash collection and deposit procedures in advance of the event. Consider having each volunteer acknowledge that they received and understand the cash collections and deposit procedures. Additionally, a list of these procedures should be kept in the cash box as a reminder. Such procedures may consist of the following and should help mitigate the risk of improper collection processes:

- Upon start up, utilize a log to document which individuals were given a cash box and the amount of the start-up change/currency (float).
  - Keep a standard amount of start-up change/currency in each cash box.
  - Require the individual checking out the cash to sign the log indicating his/her agreement with the start-up amount.
- Do not allow commingling of personal money with donations.
- Do not utilize cash collections for last minute purchases the day of an event.

- Refrain from making change unless a patron has made a purchase/donation.
- For repeatable events, each event's collections should be documented via standardized forms. For example, if the fundraising society runs concessions during each tournament, consider creating a standardized log sheet to track sales and match up to cash at the end of the day.
  - The forms should be remitted to the treasurer of the fundraising (or their representative), along with the physical cash collections, immediately following the event.
- Accept cheques made out to the organization only.
  - Immediately endorse the cheques (fill out the line on the back of the cheque).
- Two volunteers or employees should independently count the cash immediately after the event. The two cash counts should be compared to make sure the collections are counted properly.
- Utilize lockable bank bags to secure cash bag and collections.
- For concession-type activities, consider reconciling inventory to cash receipts.
- Consider tracking the average cash receipts per individual per event and investigate anything not meeting your expectation based on the average receipts per event.
- Make deposits to the bank regularly (do not allow undeposited cash/cheques to exceed \$1,000) and have two individuals count the deposit before it goes to the bank.

For events with ticket income:

- Use pre-numbered tickets if possible.
- Document all volunteers who were issued tickets and which numbers.
- Reconcile tickets sold to cash received.

## Completing your Annual Return and regular reporting on financial activities

**You are required to file an Annual Return every year.** Note that this is not your income tax return. This is your corporate Annual Return, and it provides up-to-date information about your not-for-profit corporation. This information is then made available to the public through the Corporations Canada website. Members of the public, financial institutions and many other interested parties rely on this information. On your Annual Return form, you must provide the date of the corporation's last annual meeting of members.

**File financial statements and public accountant's report.** This applies only to "soliciting" not-for-profit corporations, which are generally those that receive public donations and/or government grants more than \$10,000 in a single financial year. Corporations Canada makes the financial documents of soliciting not-for-profit corporations available to the public. You are required to send financial documents every year.

**Complete AGLC or other grant reporting.** Often specialized grants/donations will require specific reporting, which should be outlined in the grant agreement or award letter. This reporting is not optional and there can be financial consequences for societies that do not complete them. Often, these

organizations (such as AGLC) will follow up with societies years later to ensure outstanding reports are filed. Failure to do so can result in an inability for the society to apply for new grants in the future or would require funds to be remitted back.

**You may need to file a tax return.** Sometimes, not for profit organizations are required to submit a T2 Short Return to the Canada Revenue Agency on an annual basis. We recommend fundraising societies do their research on this requirement and obtain advice from an accounting firm and/or tax lawyer as needed.

## Obtaining insurance

A society or association registered as its own entity must have its own insurance coverage. These associations acting as their own entity are not covered by EIPS insurance policies.

General liability coverage protects your organization against third party legal liability related to property damage or bodily harm, such as damage to property that you don't own or rent, or injuries sustained during your programs. General liability automatically covers directors and employees while they are acting in the scope of their duties; however, you may need to request an extension to cover volunteers. Alternatively, you can obtain paid coverage for volunteers through WCB for injuries related to volunteering. **This is important coverage** – if a student, parent, or community member is injured during one of your fundraising events, general liability coverage will typically cover costs of related lawsuits, etc.

Abuse coverage (including physical, sexual and other types of abuse) is generally excluded from most general liability policies. Organizations working with vulnerable populations such as children, the elderly, or the disabled, should consider obtaining abuse coverage. Depending on your insurance company, this may be added as an endorsement to your general liability policy, or it may be issued as a separate policy. However, only a small number of insurance companies in Canada offer abuse coverage, so talk to your broker or agent.

**Automobile Insurance:** Volunteers should contact their insurance provider or broker for guidance if they are going to use their personal vehicles for society activities. Coverage depends on the activity (transporting just yourself vs transporting others vs transporting specialized equipment) and your particular coverage.

A volunteer's personal homeowner, condo or tenant's insurance policy may protect them against some risks related to volunteering. For example, if they damage their own camera or other property they own while volunteering, it may be covered under their personal policy.

## Transition planning

Ensure meetings are scheduled each year for transition planning of team members joining and leaving the society, whether it be for other endeavors or due to their child graduating from the school. A new



team member needs to be up to date on the rules and regulations surrounding the involvement of the society in fundraising for the school or a school purpose, the processes and procedures that need to be adhered to, and any fundraising events in the pipeline or planned future pursuit of a specific goal.

During the annual general meeting, your society should do an annual review of the financials (including the annual return) and should go through where all records are kept. Records should not be kept at the school and should be retained for a minimum of 7 years.

## Contracts

Fundraising societies should be cautious when signing or authorizing contracts. This can include grant agreements, purchase agreements and other forms of contract.

Generally, if a contract is short-term (a year or less), has minimal risk and low dollar value, the society can sign after reviewing. Be sure to read the cancellation clauses and look for any potential penalties or fines that could arise. When making purchases or signing fundraising agreements (such as a contract with Purdy's to run a fundraising campaign), look for minimum order requirements and timelines to ensure you can meet them. Also consider delivery requirements – anything over summer will be problematic.

Fundraising societies should not enter into long-term (greater than 1 year) contracts without consultation with the principal, nor any contracts that are of a significant dollar amount. Although the society is a separate legal entity, there tends to be more frequent transition in society leaders and often these types of contracts can get 'lost' over the years, due the personnel changes. Having the principal in the loop will help mitigate this. As well, long-term contracts that commit the fundraising society to a certain activity or undertaking (such as long-term maintenance of a building, equipment, etc.) are very risky and fraught with potential challenges. Typically, with discussion there are alternatives to these types of contracts.

Your principal also has access to EIPS central Purchasing staff, who have expertise in contracts and can provide guidance.

# Fundraising Society Event Plan

**Fundraising Event Name:** <enter here, such as "Band Hot Dog Sale">

**Fundraiser Date or Date Range:** <enter here, such as "May 10-12, 2022">

**What is being fundraised for:** <enter here, such as "New Band Instruments">

**Target Fundraising Goal (\$):** <enter here, such as "\$2,000">

**What happens if goal is not met or exceeded:** <enter here, such as "If not met, less instruments will be purchased. If more than \$2,000 is received, more instruments will be purchased">

**Event Plan – include event logistics such as location, staff/volunteers required, promotion/communication plan, safety or liability considerations:**

<enter here, such as "Coordinate with Wye Road Sobey's to allow us to set up a fundraising booth in front of the store to sell hotdogs. Ask for donations of hot dogs, buns, and condiments from Sobey's. Require six shifts of people for four hours each (11 AM to 3 PM, 4 PM to 7 PM for three days). We expect the fundraising association can recruit all volunteers (no school staff required). Minimum two adults per shift. For promotion, we will advertise on our society Facebook page and also request it be added to the May school newsletters. We will also need to print posters and banners for the booth in front of Sobey's, and request that the school allow access to their printers for this purpose. Touch base with insurance provider to ensure liability coverage would apply in this situation.>

**Expenses to complete this strategy:**

EXPENSE	\$ AMOUNT	NOTES
<enter here, such as "Food">	<enter here>	
<enter here, such as "Printing">	<enter here>	
<enter here, such as "Design">	<enter here>	
<enter here, such as "Other">	<enter here>	
<b>TOTAL</b>	<enter here>	

**Plan for safekeeping of funds raised:** <enter here, such as "A lockable cash box will be used at Sobey's to hold funds as customers buy hot dogs. Prior to the event, fundraising society will provide a \$100 float to ensure change is available. At the end of each day, a fundraising society member will deposit all cash (less \$100 float) into the fundraising society bank account and provide information to society Treasurer.">

**Plan for use of funds (purchasing, etc.):** <enter here, such as "Funds are donated directly to school via a cheque from the fundraising society, school purchases band instruments from their standard vendor, which allows GST claim.">

**By signing below, I agree this Fundraising Event Plan is acceptable.**

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**Fundraising Society Representative**

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**Principal or Representative**