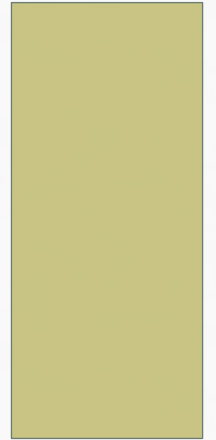


# FUNDRAISING: BENEFITS AND LIMITS

*ELEMENTARY SCHOOLS*



# OBJECTIVE

- Participants will attain a better understanding of fundraising activities with parent groups such as the PTA, PTO and Booster Clubs.



# WHAT IS FUNDRAISING?



# WHO CAN CONDUCT AN LAUSD APPROVED FUNDRAISER?



# *STUDENT BODY*

- **Associated Student Body**
  - Students currently enrolled
  - The principal is the trustee of the student body
- **Club/Class (grade level classes)**
  - Must be properly organized
  - Approved by principal
  - Follow the guidelines on the "Fundraising & Income Generating Activities' Checklist."
  - Submit a "Request for Authorization" to the financial manager two weeks prior to the event.

# *APPROVED PARENT GROUPS*

## *PTA/PTSA OR PTO*

- California Education Code Section 51521
  - Requires that all organizations that conduct fundraising to benefit clubs, schools, students or the district at the K-12 level have prior approval from the district's governing board. The Student Body Finance Section under the Accounting and Disbursements Division is the Board's designee per Board Rule 2505.
  - Local District Coordinating Financial Manager represents the Student Body Finance Section.
    - PTA or PTO
      - Schools can have one parent group (PTA or PTO) but not both.
      - If the campus has a Magnet Center, and if the principal approves, the Magnet Center can also have a parent group.
      - Can have a cooperative activity with the student body:
        - Planning
        - Conducting
        - Sharing of proceeds
      - Submit "Request for Authorization" to fundraise on campus (3 weeks in advance)

# WHAT SHOULD THE ADMINISTRATION DO PRIOR TO WORKING WITH ANY PARENT GROUP?



# *INDEPENDENT LEGAL STATUS*

- PTA, PTO and Booster Clubs:
  - Separate legal entities of the District.
  - Ensure documentation showing independent legal status is submitted:
    - 501 (c)
    - Tax ID
    - Copy of bylaws is NOT sufficient
    - Separate insurance coverage
    - No LAUSD employee should be a voting member
    - **PTA & PTO** must complete "Approved Request for Authorization" when fundraising to benefit the school (three weeks in advance)
    - **Booster Clubs** must complete a "Fundraising Permission Request" prior to fundraising on campus.
  - **Administration should provide BUL-1633.1**
    - Relevant Documents



# CAN BOOSTER CLUBS AND STUDENTS CONDUCT COOPERATIVE ACTIVITIES?



# *SEPARATE LEGAL ENTITY*

- Booster Clubs or any other separate legal entity, other than PTAs/PTOs, cannot conduct cooperative activities with students.
  - Students can volunteer to assist with a Booster Club activity as long as it is outside of the school day.

# WHEN CAN AN APPROVED FUNDRAISERS OCCUR?

women

# *NOT DURING INSTRUCTIONAL TIME*

- **California Education Code 51520**
  - No solicitations on school premises by teachers or others during school hours, and within one hour before the time of opening and within one hour after the time of closing of schools.
    - This applies to those fundraisers that claim to have an instructional component or where pledges for the activity are obtained outside of the instructional time.
    - It is impermissible for pledges for laps to be obtained outside of the instructional day and have the laps run during P.E or other instructional periods.
    - Fundraising activities may not be linked to course credit or grades.

# WHERE AND WHEN CAN AN APPROVED FUNDRAISER TAKE PLACE?



# *ON SCHOOL GROUNDS OFF CAMPUS*

- PTA, PTO or student fundraising activities can take place on school grounds, but not during instructional time.
  - Fundraising can take place during Recess/Lunch
- Food/beverage items that are not on the approved list issued by Food Services Division can only occur 30 minutes after the end of the school day.
  - PHBAO Night
  - Open House
  - Back to School Night
- Approved items can be sold during non-instructional time as part of the “four times per year” sales referenced in Publication 464.
- Off campus

# WHERE AND WHEN CAN BOOSTER CLUB FUNDRAISERS OCCUR?



# NOT ON CAMPUS OR DURING THE SCHOOL DAY

- Booster Club fund-raising activities, including the actual sale of items, shall not take place on school grounds during the school day.
- Sales of food items can occur 30 minutes after the end of the school day.
- Leasing agreement needed to use an LAUSD campus
- Off campus



# WHAT ABOUT “SNACK SHACKS?”



- ASB can agree to a Booster Club (or a PTA/PTO/or vendor) having a concession stand at a student body activity (i.e. play production) for a portion of the sales proceeds.
  - Agreements must be negotiated by the principal prior to the event occurring and documented.
  - Agreements must only be for each event.
  - The principal must review and approve concession agreements.

# HOW CAN A PTA, PTO OR BOOSTER CLUBS COMMUNICATE WITH THE SCHOOL COMMUNITY?



# *BOOSTER CLUB COMMUNICATION*

- Communication should be clearly labeled with separate letterhead, address and/or website.
- The school cannot send Booster Club flyers home with students nor can Booster Club flyers be mailed home by the school.
  - Booster Clubs may leave flyers in the Main Office which can be picked up individually.
- Schools may never provide personally identified information to Booster Clubs.

# *PTA AND PTO COMMUNICATION*

- Communication should be clearly labeled with separate letterhead, address and/or website.
- Schools may give personally identified information to PTA/PTO unless the parent has opted out.
  - PTA and PTO should not release any personally identified information to a third party without written parental consent.

# CAN A PRINCIPAL REQUEST DONATIONS?



# *THE PRINCIPAL CAN REQUEST DONATIONS*

- The principal must review and approve any letter that is sent to parents requesting donations to ensure that it is appropriate and cannot be misconstrued as being required.
  - The Educational Equity Compliance Office
    - (213) 241-7682
  - Office of the General Counsel
    - (213) 241-6601

# QUESTION & ANSWER





# SCENARIO 1: LUNCH TRUCK

- Your PTA president informs you that he has arranged for a food truck to arrive next month during lunch. The food truck will be selling hamburgers to students, parents and staff during lunch time.
- The PTA president clarifies that the lunch truck will not accept cash, but will only accept tickets for the purchase of the hamburgers. Pre-sale tickets for the food truck will be sold in the Parent Center tomorrow.
- Flyers, advertising this event, will be sent home with the students today.

# SCENARIO 2: HOLIDAY BOUTIQUE

- The PTA is organizing a Holiday Boutique as a fundraiser.
- The PTA would like to use one of your classrooms for the Holiday Boutique.
- The PTA also expect the students to tour and purchase items from the Holiday Boutique during the instructional day

# SCENARIO 3-PTO'S COLLECTIONS

- The PTO is asking parents to bring baked goods (not prepared at home), which will be sold at a cooperative fundraising event at Back-to-School Night.
- The PTO president requests the principal to lock the money (from the bake sale) in the school safe after the event until the treasurer picks up the money on Monday morning.