



Education

Dunedin Rudolf Steiner

Learning with head, heart and hands

Fundraising Policy and Procedure

This policy and procedure is written for the whole school community including the Proprietors Trust, the kindergartens, playgroups and the Primary school. The governing bodies are accountable to the Ministry of Education, the funders and the stakeholders in the whole school for following proper processes. In addition the Proprietors Trust is accountable to the Charities Commission. The Management Team is responsible for ensuring the process are followed.

Rational

This policy and the related procedure have been written to ensure the school's fundraising is done in a way which meets the following objectives

- That fundraising is done in such a way that is in accordance with the special character of the whole school and protects its reputation
- That the fundraising is done in such a way that resources are sought to meet the needs of the whole school, in order of priority. (The school does not want to request funds for a minor project from a funder which could otherwise have been used for a more significant project.)
- That all money raised for specific purposes is clearly tagged for that purpose and only spent on the project for which it had been raised
- That money collected is safely held, recorded and banked promptly and that it is properly recorded in the financial accounts of the relevant entity within the whole school.
- That the school is able to report accurately and in a timely fashion to its funders and its community on its fundraising activities
- To ensure the school retains flexibility with funds raised for general purposes (ie not earmarked for a particular project), fundraising will normally be led by the Proprietors Trust. This means that the money raised can then be allocated to a wider range of projects, including property matters which would normally be outside the scope of the Primary School Board.

Procedure

1. As part of its strategic planning, the Proprietors Trust will develop a list of priorities for fundraising at the same time that the annual budget is drawn up. This will be approved in November prior to the new school year and may cover a period of one to ten years
2. Any potential fundraising activities within the year will have to be requested in writing and approved by the Management Team (for activities aimed to raise under \$2,000) and by the Proprietors Trust for larger activities. The

approval will only be given if the activity is not in conflict with the priority list. The following points will be considered in granting approval and should be addressed in the written request

- How it fits with the priorities of the school
 - How it fits with Special Character and reputation
 - Is the plan for managing the project adequate to ensure resources are protected
 - Do the people managing the project have sufficient time, experience and resources to be able to do it effectively
 - Have any necessary legal or other compliance issues been adequately addressed
3. Funds raised will be counted by the people nominated by the project, with at least two people present and signing off the counting. Funds will be banked within the next three working days for amounts under \$1,000 and on the next working day for larger amounts
 4. Any grant applications must be first approved by the Management Team and then approved and signed off by the Proprietors Trust. A copy of all applications must be filed with the school office.
 5. Fundraising done by the school must comply with Ministry of Education guidelines provided below

This policy and procedure is made available to the Proprietors Trust, the Board of Trustees, all staff and the parent community and they are consulted with on any changes.

Procedure approved by G. STUEDEMAN (Name) Signed [Signature]

For the Proprietors Trust 13/06/19

Procedure approved by H. Thomson (Name) Signed [Signature]

For the Board of Trustees

Date 16.12.19 Next review