



## **FUNDRAISING POLICIES & PROCEDURES**

### **Procedures**

All fundraising procedures must follow Fiscal Policies outlined in Board Policy #307

### **Soliciting Funds**

1. All fundraising solicitations must be pre-approved by UPCS Executive Director or designee.
2. One school employee should be designated as contact person per fundraiser. This person should be available to answer any calls on solicitation and is the designated person to retain copies of all letters/requests for solicitation.
3. All letters/requests soliciting funds should be dated and numbered sequentially. The request should clearly identify the purpose of the solicitation and describe its programs in clear and specific language. At minimum, the solicitation request should have the following:
  - a. Date
  - b. Solicitation Number
  - c. Name of Organization
  - d. Address
  - e. Purpose – What money is being requested for
  - f. Contact Person at School and Phone Number
  - g. Statement that check should be payable to: UPCS

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**Adopted/Ratified: 11/04/09**

**Revision Date: 5/6/13, 3/23/18**

## Board Policy: Business & Noninstructional Operations # 306

4. Donors should be encouraged to make contributions by check and make check payable to UPCS. Cash is not encouraged. Checks should not be made out to the individual collecting the donation.

### Fundraising Events

1. All fundraising events shall be organized with prior written approval of the Executive Director or designee.
2. All requests for fundraising shall include a specific purpose for the fundraising activity.
3. Within seven (7) days of the completion of the fundraising event, a fundraising report shall be provided to the Executive Director or designee. The fundraising report shall contain:
  - a. The name of the organization
  - b. The date of the fundraising event
  - c. A description of the fundraising event
  - d. The expenses incurred by the organization and a copy of the receipts for the fundraising event
  - e. The amount of funds raised by the event
4. All fundraising money shall be remitted to the Charter School no later than seven (7) days after the completion of the fundraising event and will be deposited by the Charter School into an account designated for the school-related organization.
5. Fundraising money will be disbursed to the authorized representative of a school-related organization after submission to and approval by the Executive Director or designee of a disbursement request. The disbursement request shall contain:
  - a. The name of the organization
  - b. The date of the disbursement request
  - c. The amount of the disbursement request
  - d. A description of the purpose of the disbursement request
  - e. Supporting documentation, including invoices and estimates

### Cash Receipts (Cash and Checks)

Board Policy #307 outlines required procedures for the collection of funds.

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**Spending Funds**

1. All expenditures must be pre-approved by UPCS Executive Director or designee.
2. All invoices submitted for payment must be approved for payment with the following items identified on the actual invoice:
  - a. Funding Program (Job #)
  - b. Expense Account (Object #)
  - c. School Site Location (Class #)

*For example:*

*An invoice received from Four Winds for bus transportation for 6<sup>th</sup> graders field trip from the school campus #1 should be stamped approved and coded accordingly:*

Approved: Tammy Stanton

Date: 11/25/08

Amount: \$250.00

Object Code / Site: 5812, School

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