

FUND-RAISING SUPPLIER APPROVAL PROCESS

Agents and Salesperson

Promotional and/or fund-raising projects, along with the activities of salespersons wishing to conduct business with school building personnel during working hours, shall be governed by the following guidelines.

A. Process

Building principals and/or parent organizations shall work only with those sales representative who present a letter of approval from the Superintendent or his/her designee. Salespersons wishing to gain approved status shall follow the procedures listed below in Section B.

Prior to initiating any school fund-raising project, the building principal shall contact the Purchasing office to obtain the names of those fund-raising companies and/or sales representatives appearing on the school district's approved list. The principal may then proceed to work with the company or salesperson(s) of his/her choice.

B. Securing Approval As a Salesperson

1. A completed application form and W-9 form shall be submitted by the vendor to the Purchasing office.
2. In addition to the applications, the potential fund-raising supplier must provide:
 - a. Background of the company
 - b. Descriptions of the product or services to be sold
 - c. Names of at least three (3) other organizations with which the vendor has done business.
3. Upon review of the above information, the Superintendent or his/her Designee shall issue a notification of approval to those salespersons and/or companies, which meet the district's criteria.

All who oversee or perform transaction involving money and goods should adhere to the attached list of recommended practices.

1. All fund-raisers MUST have prior approval.
2. All funds must be deposited into an Agency/Fund-raising account number.

Please contact the Accounting department to set this up.

HANDLING OF CASH

The most basic obligation of all is the proper handling of cash (currency or coin). Whenever a person representing your school accepts the responsibility for receiving cash, for any reason, that person must be accountable for the prompt receipting, counting and depositing of the cash into appropriate bank accounts.

It is best if money received is counted by two (2) people, with both signing the deposit slip.

If the money is to be handled by a building treasurer, then a numbered receipt should be issued to the person transferring the money, with a copy retained in the school office.

Money collected should be carried to the bank or Accounts Payable office and again receipted. All people in a position to receive money must be informed that they should observe the following:

-DO NOT store money in your desk or file cabinet, etc.

-DO NOT take money home

-DO NOT deposit money in a personal account

-DO NOT send money through the courier

Anyone ignoring these basic rules regarding the proper accounting and safeguarding of cash is needlessly exposing themselves, your school and the Board of Education to risks. It should be made clear that such rules and procedures do not imply a lack of trust. Rather they protect all those involved against potential claims of misconduct or their offenses.

Fund-Raising Activity Request Form

Prior to fund-raising activity starting, this form must be completed and approved by Principal and Superintendent or his/her Designee.

Name of Club or Group: _____

School/Class: _____

Advisor/Representative: _____

Name of Fund-Raiser: _____

Type of Fund-Raiser: ___ sale of products ___ Other, please describe:

Fund-Raiser involve students?: yes ___ no ___

of Students Participating: _____

If yes, are all Parental Permission Forms attached for all students participating in Fund-Raiser? _____

Purpose of Fund-Raiser: _____

Staff Member managing the funds: _____

Dates Fund-Raiser to run: from _____ to _____

Date funds are to be deposit: _____

Account number that funds will be deposited into: _____

I understand that all funds collected from this fund-raiser must be deposited into District held account and that Purchase orders will be issued to cover expenses incurred for fund-raiser. It is also by Purchase order only that payments can be processed using these funds. All activity of this fund-raiser will be according to Board policy 3800.

Signature: _____ Date: _____

Approval/Disapproval of Fund-Raiser

APPROVED: ___ DSAPPROVED: ___ Principal: _____ Date: _____

APPROVED: ___ DISAPPROVED: ___ Superintendent): _____ Date: _____
or(his/her Designee

(Please type or print)

FUNDRAISING APPLICATION

MARK ONE:

Lansing School District
Purchasing Department
519 W. Kalamazoo St. Room 200
Lansing, MI 48933
Phone #(517)755-3030 Fax # (517)755-3019

New Application
 Update
Date: _____

DUN & BRADSTREET RATING (if available)

NAME OF COMPANY	FEDERAL ID NUMBER (OR) SOCIAL SECURITY NUMBER	
ADDRESS		
ADDRESS TO WHICH PAYMENTS ARE TO BE MAILED		
PARENT COMPANY AND ADDITIONAL OFFICE LOCATIONS IN MICHIGAN (May attach separate sheet)		
E-MAIL ADDRESS:	WEB SITE:	
TYPE OF ORGANIZATION <input type="checkbox"/> Individual <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation	TELEPHONE #: _____ FACSIMILIE #: _____	
PERSONS TO CONTACT AND THOSE AUTHORIZED T CONTRACTS IN YOUR NAME (if agent, so specify)		
Name	Official Capacity	Telephone No.
Please complete the following:		
STANDARD PAYMENT TERMS: _____ PROMPT PAY DISCOUNT: _____ STANDARD DELIVERY TIME: _____		
FOR REPORTING PURPOSES ONLY		
Business located within Lansing School District? Yes ___ No ___		
Please list percentage and circle category that applies:		
MINORITY OWNED: _____% Native-American Asian-Pacific American African-American Hispanic-American Asian-Indian American		
WOMEN OWNED: _____% White Native-American Asian-Pacific American African-American Hispanic-American Asian-Indian American		
DISABLED: _____% SMALL BUSINESS: Yes ___ No ___		
(Please list references on reverse side). Enclose descriptive literature and price list with application.		
I have reviewed the Lansing School District Fundraising policies attached. All information submitted is accurate and true.		
SIGNATURE OF PERSON AUTHORIZED TO SIGN THIS APPLICATION		
NAME AND TITLE OF PERSON SIGNING (Please type or print)		

Lansing School District
Fund-Raising Activity Report

Club or Organizations: _____

Activity: _____ Date: _____

Gross Income or Receipts: \$ _____

TOTAL INCOME.....\$ _____

Less Expenses

- 1. Cost of Goods Sold: \$ _____
- 2. Others (list) _____
- 3. _____
- 4. _____
- 5. _____

TOTAL EXPENSES.....\$ _____

NET PROFIT OR LOSS.....\$ _____

Fund-Raising Sponsor

Building Administrator

Lansing School District

519 W. Kalamazoo St
Lansing, MI 48933

Elementary School Fund-Raising Parental Permission Form

Dear Parent or Guardian:

Please grant permission for your child to participate in our fund-raising project.* We ask that you abide by the Lansing School District Policy No. 5154, which states:

- No child may participate without prior written parental permission.
- No solicitation of funds shall be made by elementary students after sunset
Unless accompanied by an adult.
- Any door-to-door solicitations by elementary students must be done by no fewer than two (2) individuals.

A complete accounting of all monies raised and disbursed for this project will be available in the office upon request.

*This space reserved for goals and rationale of school's fund-raising project.

Fund-Raising Group/Sponsor

Principal

DETACH AND RETURN

I, hereby, grant permission for _____ to participate in
(Name of Student)

In the school's _____ and to abide by the
(Name of Fund-Raising project)
Lansing School District's policy concerning solicitation by students.

Signature: _____
Parent or Guardian

Date: _____

School: _____

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Section 3000 – Fiscal Management

3800 Fund Raising and Student Activity Fund

3800

Soliciting Funds From and By Students

The Board recognizes the existence of many worthwhile community and student activities that require the raising of funds either by the sale of merchandise, tickets, or perhaps direct request for money. Because of the need to safeguard students in the educational program, the Board limits participation of students to those activities that have the Superintendent's approval.

It is the responsibility of the Board to provide the necessary basic texts, materials, supplies, equipment, uniforms, buildings and outdoor facilities to conduct the approved educational and co curricular programs of the District. Community and school fund raising organizations may contribute to the enrichment of these basic programs through the contribution of funds and/or items considered to be non-necessities as long as those contributions have been determined consistent with the above and approved by the Superintendent through the appropriate building or program administrator.

This policy is not to affect those regular school programs such as dramatics or musical concerts, etc., as those students will be selling tickets for an activity in which they are taking part. Elementary students will not be asked to sell tickets for middle school and senior high school activities.

If a fund raising project is conducted to sponsor a specific purchase, activity or trip, the purchase or trip must be approved prior to initiation of the fund raising effort. This shall apply to school related groups as well as to school organizations.

Every attempt shall be made to coordinate fund raising activities among buildings and various organizations in order that excessive demands are not made upon members of the community. Such coordination is especially important at Christmas or other holiday times when innumerable items are available for sale by the students.

Section 3000 – Fiscal Management

3800 Fund Raising and Student Activity Fund

3800-2

Student Groups

The Principal must approve all fund raising events in advance. Requests must be on an approved application form and submitted to the Principal at least one month prior to the proposed activity. Requests from high school student groups must first be submitted to the high school student council for its recommendation.

Only school-sponsored groups may sell or solicit in a school building and then only with the school housing the group, during non-instructional time.

There shall be no selling or soliciting outside the District except as part of a booth at a fair, shopping center, or other locations where potential “customers” are coming to them. Advertisements and sales may be solicited from establishments outside the District only if there is an apparent community of interest.

School sponsored organizations may not have more than one money-raising event a year that would involve going into the community. Cards, letters, or other identifying literature shall be provided all students authorized for sales in the general community. Written parent(s)/guardian(s) permission must be signed and returned to the school before elementary students can sell door-to-door.

Specifics

- Fund raising projects carried on for special trips or special projects should not be started until approval of the trip or project is granted. Trips covered by this policy shall include out-of-state and overnight trips, as well as trips to foreign countries.
- Any sale of commercial products or the solicitation of funds in a door-to-door campaign and/or through contracts with the businesses shall require approval of the building Principal before any oral commitment, written agreement, or contract is made or any advance publicity or group promotional activity is undertaken.
- Once approved however, before sales begin or solicitations are made, contract agreements must be signed by the building Principal.
- Fund raising projects shall be compatible with the school’s purpose, goals, and general community expectations, but shall not conflict with local business enterprises unduly.

Guidelines for Fund-Raising Projects

1. The school principal shall be responsible for all fund-raising activities carried on by clubs and organizations within the school.
2. Sponsors of fund-raising activities must obtain prior permission for the activity from their building principals.
3. The follow shall be review by the sponsor with the principal prior to starting the activity:
 - A. Reason for activity (i.e., camp fees, equipment purchase, etc)
 - B. Objective to be achieved
 - C. How fund-raising is be conducted (sale of merchandise, service, sale by student to student, sale outside school to public, etc)
 - D. Type of merchandise to be sold.
 - E. How long activity is to last.
 - F. Vendors must be on school district's acceptable vendor list.
 - G. Fund-raising materials must be free of gender, cultural, and ethnic bias.
4. Accounting for receipts and expenditures:
 - A. All merchandise purchased shall be made in the name of the school district (preferably on credit basis and paid by Internal Fund Check Request through the Accounting Office).
 - B. Sales tax **must** be paid on all merchandise purchased by fund-raising activity (as required by state law).
 - C. Care should be exercised in the accountability of goods to be sold.
 - D. Handling of money and receipts shall be in a business-like manner.
 - E. Sales monies shall be recorded and deposited regularly with the school treasurer or school principal.
 - F. All receipts must be deposited intact. **ABSOLUTELY NO EXPENDITURES MAY BE MADE FROM CASH RECIPITS.**
 - G. Records of activity shall be recorded and maintained for review by the Finance Office, Internal or External Auditors, or parents of participants as outlined in Item 6, Board Policy 5154.
5. All elementary and middle school students participating in a fund-raising project must have a signed parental permission slip on file prior to the commencement of the fund-raising project as outlined in Items 2 and 3 of Board Policy 5154.

Attached is a copy of the principal's approval form, parental permission slip, and the fund-raising activity report, which are to be used for fund-raising activities.

If there are questions concerning fund-raising account procedure, contact the school district's Internal Auditor for advice and/or clarification.

Section 3000 – Fiscal Management

3800 Fund Raising and Student Activity Fund

3800-3

Adult Groups

School related organizations that are primarily adult and the funds used primarily for the improvement of the educational program must submit a written request through the Principal to the Superintendent. This request should be submitted one month in advance and identify the nature of the activity and the date of the activities. Fund raising activities should not commence until approval has been granted. The purpose is not to unduly limit the activities of these groups, but rather to:

- Be assured that students are not being “used” or their educational program interrupted.
- To assist with coordination of activities so that similar activities are not in conflict with each other.
- To be assured of the appropriateness of the activity and that all fund raising activities comply with local and/or state regulations.

Since some courts have ruled that the Board is liable for fund raising activities of such groups, funds raised are to benefit the school or its organizations.

Approved: January 20, 2005

Section 3000 – Fiscal Management

3610 Purchasing Goods and Services

3610

The Superintendent, and or his/her designee, shall be the sole purchasing agent for the District.

The purchase of goods and services required for the operation of the Lansing School District shall be conducted in accordance with all applicable laws. The purchasing process shall be open and competitive. Purchasing award decisions may include price; product quality; service; delivery; maintenance of product; adherence to specifications; past performance to the District; supplier reliability; warranties; supplier environmental responsibility; supplier school-to-work programs (including apprentices and cooperative training programs), supplier community responsibility; responsible contracting compliance, increasing the diversity of the supplier pool (as permitted by law) and increasing the percentage of contracts with local companies.

The Lansing School District places a high value on the richness of our diverse schools and community. The District will play a leadership role in promoting inclusiveness and the elimination of discrimination. All suppliers doing business with the school district must comply with state and federal laws on equal employment opportunity. In addition, companies responding to requests for formal bids for goods or services shall be required upon request to submit to the school district verification of compliance with laws. Suppliers shall state they do not discriminate against any employee or applicant for employment because of race, color, religion, national origin, sex, age, height, weight, marital status, or disability. Failure to present such and/or to not comply with state and federal laws on equal employment opportunity shall result in the supplier being removed from the District's supplier list and the rejection of the supplier's bids.

Cooperative Purchasing

Governmental cooperatives, joint governmental purchasing, and private cooperative purchasing agencies may be used if it is deemed in the best interest of the District and the agency adheres to the requirements of this policy.

Purchases through the District

Board members and employees shall not make any purchase through or in the name of the District for personal use. The name of the District or school or the employee's position, shall not be used in such manner that discounts or cost preferences are given to such person. Purchasing equipment and supplies by the District for resale to employees is prohibited.

Unauthorized Purchases

Unauthorized purchases by staff members are not the responsibility of the Lansing School District. Staff members that commit to unauthorized purchases shall be held individually responsible for payment of such obligations.

Section 3000 – Fiscal Management

3610 Purchasing Goods and Services

3610-2

Emergency Purchases

Emergency purchases of materials or labor for building construction, addition, renovation or repair may be made without using the quotation or bidding process if authorized by the Superintendent. Emergency purchases over the state-imposed bid limit must be authorized by the Superintendent. A report of the emergency purchase shall be presented to the next formal school board meeting for formal approval.

Approved: January 20, 2005

Revised: February 2007

LEGAL REF: MCL 15.321-330

Formatted: Normal

Section 3000 – Fiscal Management

3730 Vendor Relations

3730

Vendors shall make contacts through the Superintendent. Vendors shall not contact other administrators or school employees directly unless such contact is approved or authorized by the Superintendent.

Approved: January 20, 2005