

COPLEY-FAIRLAWN CITY SCHOOL DISTRICT
OFFICE OF THE TREASURER

TO: Student Activity Advisors and Coaches

FROM: John Wheadon *JW*

DATE: July 27, 2009

RE: Student Activity Guidelines

Board Policies

The attached Board policies should be reviewed and followed as you plan and conduct your student activities.

Responsibility of Advisors

The advisor shall be responsible for the proper completion of all forms pertaining to the activity. This includes keeping accurate records of all money collected and deposited with the Treasurer's office, keeping an accurate inventory of merchandise offered for sale, keeping an accurate record of purchase orders received, balancing your activity's financial record with those kept by the Treasurer's office. All money is to be collected and deposited in accordance with the Ohio Revised Code (within 24 hours of collection). No money is to be kept in classrooms or offices.

Student Activity Forms

The attached student activity forms must be completed as specified on the next page. Blank forms can be obtained from the Treasurer's office. **The Purpose Statement and Budget form should be completed and returned no later than September 30, 2009.** The Sales Project Statement should be completed at the conclusion of each fundraiser.

Financial Reports

Monthly financial reports will be forwarded to your building Principal for distribution to the advisor. Please notify the Treasurer's office immediately of any errors. If at anytime you need additional information, feel free to contact me at extension 524816.

Procedures for Expenditures

No purchase shall be made without a pre-approved purchase order. To obtain a purchase order, a requisition should be submitted by the advisor to the building principal or athletic director, who will in turn submit it to the Superintendent. After approved by the Superintendent, the requisition will be forwarded to the Treasurer who will issue the purchase order. Only the Treasurer may authorize the encumbrance of funds by purchase order number.

EXTRACURRICULAR ACTIVITIES

The Board of Education provides the following guidelines to its administrative officials in the preparation of rules and regulations regarding the administration and sponsorship of all contests, activities, and other events conducted as extracurricular activities.

1. Administration and Sponsorship

- A. All following rules and regulations shall apply to the elementary and secondary school programs except where noted.
- B. The principal of each building shall be responsible for the general administration of the student activities conducted in the buildings in his/her charge. The principal shall report annually, by August 1, to the Superintendent the general purpose and plans of the program. The Treasurer of the District is responsible for all financial aspects of the student activity program. Guidelines formulated by the State Auditor's office shall be followed. The principal may recommend purchases to the business manager of the District.
- C. An annual evaluation of each activity, as directed by the Superintendent, shall be conducted to determine if the activity is serving its purpose and shall be continued.
- D. A review of rules and regulations for activities shall be held annually and must include a review of the number of activities in which an individual may participate, hours per week of participation and distance an individual or group may travel to participate in an activity, contest, tournament, festival, parade or other exhibition.
- E. The school organization sponsoring an activity or contest, must be one which is engaged in a creditable or acceptable enterprise to benefit the school students. The activity or contest must not be used by an organization to exploit the students' project for commercial or advertising purposes or conduct such activity in a manner other than that agreed upon.

2. Contests and Activities

- A. All activities and contests must be approved by the principal and Superintendent in compliance with this policy and regulation.
- B. Criteria for approval of activities shall include, but not be limited to the following:
 - 1) Activity must be educationally sound, worthwhile and timely and not sponsored primarily for entertainment purposes.

STUDENT FUND-RAISING ACTIVITIES

The following guidelines must be followed for any activity that involves fund raising by or from students.

All fund-raising activities involving students must meet the following conditions:

1. All student fund-raising activities must be in compliance with state law and the requirements of the Ohio Auditor's Office.
2. Use of instructional time is to be limited in planning, conducting, assessing or managing a fund-raising activity, unless such an activity is part of an approved course of study.
3. Fund-raising activities conducted in a school or on other District premises are not to interfere with the conduct of any cocurricular or extracurricular activity. Students involved in the fund raiser are not to interfere with students participating in other activities in order to solicit funds.
4. In accordance with Board policy, each fund-raising activity occurring on or off District premises must be approved by the Superintendent or his/her designee. In order to be approved, the group leader or advisor must submit a proposal which is in compliance with the Ohio Auditor's requirements.
5. Each recognized school-sponsored student group must submit in writing to the Treasurer a statement which identifies the purpose of the fund-raising activity and the reason for raising the money as well as all other information required by the Ohio Auditor.
6. Student groups can only have one fund-raiser per year unless approved by the Superintendent.
7. All fund-raising activities must stop when the total projected budget has been met or within two weeks from the start of project whichever comes first. Exceptions may be granted with the approval of the Superintendent or building principal.
8. Notice of the approved fund-raising activity is to be included in the appropriate school newsletter(s) for informational purposes for parents and interested parties.
9. All participants soliciting from and/or selling to service organizations, businesses or the general public must carry and understand a cover letter explaining the specific purpose of their project.

10. Requests for purchases from student activity funds can be made only by faculty advisors, coaches or teachers assigned to the activity.
11. Elementary students (K-5) do not sell items or solicit donations by going door to door.
12. Pep rallies or assemblies promoting aggressive student selling, prizes, awards or incentives are discouraged.
13. All prizes, awards and incentives must be approved by the principal.
14. Contracts with outside suppliers for merchandise to be sold in a fund-raising activity are to be reviewed by the principal and signed by the staff member in charge, who shall be personally responsible for the merchandise sold and monies collected. The contract must specify that any merchandise which is unsold and is resalable by the supplier can be returned for full credit. The District is not be responsible for any unsold merchandise that cannot be returned to supplier for credit for any reason.
15. Fund-raising activities off District premises shall be voluntary and with written permission from parents. If an activity involves the students providing a service in return for money, such as a car wash, a member of the professional staff shall supervise the activity at all times. His/her responsibility is to ensure that the service is provided in a proper manner, and also to ensure the safety and well-being of the students and the property of both the purchaser and the owner of the site.
16. Any fund raisers that require students to exert themselves physically beyond their normal pattern of activity, such as runs for charity, must be monitored by a staff member who has the necessary knowledge and training to recognize and deal appropriately with a situation in which one or more students may be overexerting themselves to the point of potential injury.
17. The staff member in charge should establish procedures to ensure that all merchandise is properly stored, distributed and accounted for, and a report should be made within five days after the end of the fund raiser. The report should indicate:
 - A. total cost of items or merchandise;
 - B. amount of money projected and amount of money raised;
 - C. any differences between the actual activity and the planned activity;
 - D. any problems that occurred and how problems were resolved;
 - E. when and where funds are deposited and
 - F. if merchandise was involved, how many items were offered for sale, how many sold, the amount of money collected and the dispositions of

any unsold items.

18. Donations to the District to be used for fund-raising activities must be approved by the Board or its designee.
19. Failure to follow these regulations could result in the suspension or loss of fund-raising approval.

School and Community Service Project Definitions

1. Fund-raising activities
 - A. Any donation, product or service solicited from and/or sold to community service organizations, businesses or the general public.
 - B. Any awards, prizes or incentives offered as part of a student selling activity. Examples:
 1. candy sales
 2. magazine sales
 3. carnival for profit
2. School Service Projects
 - A. Any project done for service or to benefit students, teachers or parents which involves no soliciting of donations, products or services from community service organizations, businesses or the general public. Examples:
 1. skating parties
 2. pizza parties
 3. Mother Day gifts
 4. carnival for nonprofit
 - B. Any profit-intended project, completed in-house, which principally involves students, teachers or parents requiring no soliciting of donations, products or services from community service organizations, businesses or the general public. Examples:
 1. concession stands
 2. school pictures
 3. book fairs
 4. sale of miscellaneous items (caps, t-shirts, jackets, etc.)
3. Community Service Projects
 - A. Any project which involves open solicitation, is completely nonprofit and is charitable in nature. Examples:
 1. holiday food drives

2. **generation of funds for a recognized charity**
3. **funds for scholarships/grants**

Approval date: December 17, 2002

STUDENT ACTIVITIES FUNDS MANAGEMENT

To safeguard and provide for the efficient financial operation of student activities, the funds of these activities are managed as follows:

1. The Superintendent designates an individual to serve as the activity account clerk under the jurisdiction of the Treasurer. The Treasurer is authorized to receive and disburse student funds in support of the entire school activity program. The Treasurer is directly responsible for the proper accounting of student activities funds.
2. Requests for purchases from student activities funds can be made only by faculty advisors, coaches or teachers assigned to an activity. These requests must be approved in writing by the school principal or other person designated by the Superintendent. Funds must be available before such purchases may be authorized. Expenses are subject to Board approval.
3. An accounting of all student funds is made monthly and a report is made by the Treasurer to the Superintendent and the Board. The account system complies with the regulations of the Ohio Auditor. The system separates and verifies each transaction and shows the sources from which the revenue is received, the amount collected, source and the amount expected for each purpose.
4. When an unexpended balance remains in the account of a graduation class (Fund 200), the class should specifically indicate its intent to the Board for the disposal of such funds within six months of graduating. The Board exercises its prerogative in disposing of such funds when the graduating class is negligent in giving instructions.

(Adoption date: September 16, 1986)

(Revised: January 14, 2003)

LEGAL REFS.: ORC 3313.25; 3313.51; 3313/53; 3313.811
3315.062
5705.41; 5704.412

CROSS REFS.: DH, Bonded Employees and Officers
DI, Fiscal Accounting and Reporting
DIB, Types of Funds
DJ, Purchasing
DJF, Purchasing Procedures
IGD, Cocurricular and Extracurricular Activities
IGDF, Student Fund-Raising Activities
JL, Student Gifts and Solicitations

