



Fundraising Policy and Guidelines

I. Purpose

The fundraising priority of the Development Office is the Annual Fund, which supports the current general operating budget of the school. The Development Department solicits from multiple constituencies throughout the community, predominantly current parents and alumni, but also grandparents, faculty, staff, foundations, corporations, board members and friends of Heritage Academy. The Development Department is in a position to know of efforts that may be in progress with any given donor. This coordinating function prevents “nickel and diming” our constituents, duplicated requests by Heritage groups, and increases the possibility of success in discussions with donor(s). This policy has been adopted to ensure a coordinated approach to fundraising.

Fundraising above and beyond the established programs is not generally encouraged with the exception of projects that may enhance or improve the educational program. Recognizing there are times, however, when it is appropriate and necessary to raise funds not covered by the operating budget for classes, service-learning initiatives, teams, clubs and organizations, all organizations and groups are asked to adhere to the guidelines outlined on page 2.

II. Responsibilities

Fundraising programs coordinated by the Development Department include, but are not limited to:

- Annual giving from all constituencies via the Annual Fund (HA Plus) and endowments.
- Capital Campaigns or building campaigns
- Deferred or planned giving programs (estate planning for the benefit of Heritage Academy)
- Fund-A-Need, special projects or designated gifts to specific program or activity
- Grants
- Corporate Sponsorships
- Requests for donations for Heritage Academy special events

The Development Department is responsible for the official recording and acknowledgement of all gifts made to Heritage Academy. Gifts to Heritage Academy will be handled in accordance with all State and Federal policies and procedures. Gift donor



information must be provided to the Development Department for purposes of recording and acknowledgements.

In coordination with the Head of School, Business Manager, and Board of Trustees, the Development Department will determine the level of funding required to name projects, scholarship, or other appropriate endeavors.

III. Fundraising Guidelines

The Development Department of Heritage Academy is responsible for coordinating all fundraising activities conducted for the benefit of Heritage Academy.

General Fundraising Guidelines:

- Before proceeding with any fundraising, on or off campus, approval and coordination with 1) a faculty member, staff person, and/or coach, 2) the school principal and 3) the development department is required. **It is highly recommended departments work together in coordinating fundraising efforts throughout the year. This includes holding a single fundraiser to benefit like needs (i.e. class trips).**
- Fundraising should be for the benefit of the collective program, department, club, humanitarian or charitable cause.
- Fundraising for school clubs or groups will only be permitted to earn operating monies to meet reasonable expenses during the year, not to build up excessive reserves.
- Fundraising organizers and sponsors must coordinate efforts with the Business Office to ensure financial accountability for fund raising activity, including but not limited to the following:
 - Original receipts for expenses are required for reimbursement;
 - A purchase order must be completed one week prior to fundraiser if needing start up cash; and,
 - The Post Fundraiser Report should be used to record/report funds collected.
 - A Fundraising Activity/Event Application for organizers/coordinators is required as well as the Post Fundraiser Report. Both are located on the fundraising web page heritagepatriots.com/giving/giving-faq and in the front offices.



- Processing and official receipting of gifts as well as public announcement of gifts should be completed through the Development Department.
- Soliciting local businesses, national corporations, or individuals (alumni, friends of the school, etc.) by any student group for donations (money, sponsorships, gifts, premiums) to support campus fund-raising must be approved by the Development Department before any contact can be made.
- Service oriented fund-raising activities are acceptable upon approval from the Development Department, Head of School and fundraising sponsor.
- Fundraising activities that are sales oriented are unlikely to be approved by the Development Department. *Existing fundraisers that are not subject to this policy include, but are not limited to Heritage Academy Cheer Greenery, HA Raffle, Junior and Senior class projects, Party with the Pats Auction and existing student council fundraisers.*
- Fundraising activity/event signage and marketing materials may include the school logo, but the logo usage guidelines must be followed. Fundraising activity signage and marketing materials used outside the school campus must be preapproved by the Development Department and Head of School.

Student Fundraising Guidelines:

Student fundraising activities are an adjunct to the educational program and the mission of Heritage Academy and as such must be approached in such a way as to enhance its “learning potential” that can be defined as encouraging students to take responsibility, to be more involved in the larger school community, to work with a group, to promote school spirit and to learn valuable business lessons. Faculty, administration or school sponsored volunteers may encourage but may not require students to participate in fundraising activities as donors or petitioners.

- Student fundraising is limited to peer-to-peer activities.
- Student fundraising is limited to approved clubs and organizations.
- 100% of items or funds raised through student fundraising for external charitable or humanitarian organizations (i.e. Rowdy Foundation, Habitat for Humanity, Make-a-Wish, etc.) must go to the charitable organization. It is recommended that all checks are made payable to the charitable entity directly or online via the charitable organization’s website if applicable.
- Student-led fundraisers must have a faculty/staff sponsor and be submitted to the Development Department for approval.



School Affiliated Fundraising:

School affiliated groups are those organizations established and recognized by Heritage Academy and include, but not limited to, the PTA, Sports Boosters, Student Government Association. Such groups and subcommittees should follow the general fundraising guidelines and procedures.

IV. Procedures

- 1. Coordinate Efforts** – Before proceeding with any fundraising, on or off campus, approval and coordination with the student advisor, coach, teacher or department head, principal and development department is required. Students will report directly to Development Department for approval for on-campus fundraisers.
- 2. Check the Fundraising Calendar** – Director of Development will maintain a calendar of all Heritage Academy related fundraising efforts to ensure such endeavors do not conflict/compete in terms of timing, to ensure the community is not inundated with competing fundraising requests, and to safeguard “resource equity”. The fundraiser activity/event calendar is available on the fundraising web page heritagepatriots.com/fundraising. Organizations interested in conducting a fundraiser should not check the fundraising calendar to ensure preferred dates are available. Open dates on the calendar do not guarantee availability or approval.
- 3. Follow the Guidelines** – The fundraising guidelines must be reviewed and followed.
- 4. Complete the Fundraising Activity/Event Application 2 Weeks Prior to Event** – The Fundraising Activity/Event Application must be completed, signed by the faculty/staff/coach sponsor and the Principal or Head of School then submitted to the Director of Development at least two weeks prior to the fundraising activity.
- 5. Approval or Denial** – Director of Development will contact fundraiser organizer and sponsor with approval or denial upon receiving the application. Fundraising may not proceed until approval has been received.
- 6. Get Preapproval of Solicitation Materials** – Any literature prepared to cultivate or solicit private funds/grants by any department or program is to be approved by the Director of



Development to ensure a consistent quality image and message to the external community. This includes any outside take home flyers.

- 7. Complete Purchase Order for Start Up Cash One Week Prior to Fundraiser** – If you need start up cash for your fundraiser, a purchase order must be completed with the Business Office one week prior to the start date of your fundraiser and the advisor, coach, or faculty sponsor must sign the purchase order along with the Head of School or Principal.
- 8. Conclusion of Fundraiser** –
 - a. If the funds raised benefit a Heritage Academy sponsored organization/club/team, all proceeds must be turned over to the Business Office within two days after the fundraiser has concluded along with the Post Fundraiser Report. The sponsor of the event is responsible for working with the Business Office to appropriately allocate/deposit funds.
 - b. If funds raised benefit an external charitable or humanitarian organization, the checks should be mailed directly to the organization along with a cover letter. A sample cover letter is available upon request from the Development Department.
- 9. Acknowledgment of Gifts/In-Kind Donations** – Within one week of the fundraising event, the sponsor of the event will work with the Development Department for appropriate stewardship of donors either contributing monetarily or in-kind to the fundraiser activity/event.

V. Contact Information

K.K. Gillespie, Director of Development
kgillespie@heritagepatriots.com

Vicki Hardy, Director of Alumni Relations
vhardy@heritagepatriots.com

Cara Thompson, Business Manager
cthompson@heritagepatriots.com