

NEW HAVEN UNIFIED SCHOOL DISTRICT

Application for Fundraising Activity

Event: _____

School: _____ **Event Date:** _____

This form is to be completed before the fundraising project is approved.

Name of the club or sponsoring organization: _____

Name of faculty sponsor: _____

Type of fundraising project: _____

Company/Vendor name (if applicable): _____

Proposed starting date: _____ Proposed ending date: _____

Projected

- A. Number of units to be ordered..... _____ (A)
- B. Proposed sales price per unit or ticket..... _____ (B)
- C. Anticipated sales from the project* _____ (C)
- D. Estimated total cost of all units* _____ (D)
- E. Anticipated profit* [(C) minus (D)] (E)
- F. Proposed use of profit _____ (F)

***Sections(C) through (E) must have a dollar amount**

Requested by: _____ **Date:** _____
Sponsor's Signature

Approved by: _____ **Date:** _____
Principal

Approved by: _____ **Date:** _____
Director, Fiscal Services

Must be submitted and approved before the event.

Distribution: Director, Fiscal Services
 Sponsor
 Principal

INSTRUCTIONS FOR COMPLETING FORMS IN-129 & IN-130

1. Complete the forms for each fundraising project with the exception of school pictures, yearbooks, school newspapers and school store.
2. Form IN-129: Number of units to be ordered (A) and sales prices (B) should be expressed in INDIVIDUAL UNITS; i.e. per candy bar, per candle, per calendar, etc.
3. Form IN-130: The form is designed for projects where all units will be sold at the same price. For projects with items sold at VARIOUS PRICES, a worksheet should be used to calculate lines (F) and (H) for each individual price. The calculation for (F) and those for (H) should be totaled and summarized on the fundraising form in the appropriate blanks. The worksheet must be sent in with a copy of the fundraising form.
4. ALL FUNDS REPORTED ON LINE (K) (FORM IN-130), SHOULD BE TURNED IN TO THE SCHOOL OFFICE FOR DEPOSIT FOR ALL EXPENDITURES PAID BY CHECK.
5. Follow the directions at the bottom of each form concerning the transmittal of copies.
6. Questions concerning these forms should be addressed to the District's Business Office.

GUIDELINES FOR FACULTY SPONSORS

1. Carefully review your past experience in fundraising efforts. Avoid projects that have been unsuccessful or difficult in the past.
2. Consider that all fundraising activities are a part of the learning experience. Ask yourself, "What am I teaching my students".
3. For all fundraising projects you must maintain detailed records for each student indicating the name of the student participating, the number of items issued, the amount of funds collected, and an explanation of any shortage of money or products not returned.
4. Document your efforts to collect funds and request assistance from your principal when unable to collect money from students. Turn in to your principal a list of all students owing money.
5. Document all money received from students. This can be accomplished by issuing a pre-numbered receipt to each student. The receipt should always contain a detailed explanation as to the source of the funds. When small individual amounts are collected, it may be more appropriate to maintain a list of students turning in money and have each student sign the list acknowledging the amount of money being turned in to the sponsor.
6. All funds collected from students must be given to the school office by the end of that day. No funds should be taken home by faculty members or left in the classroom overnight. If the event is sponsored by a booster club, the appropriate club official should turn in to the school bookkeeper all monies collected on the next day of business.
7. When funds are turned into the school office, the money should be counted and a receipt obtained prior to leaving the office.
8. Turn in all invoices to the school bookkeeper when received.
9. Maintain all records at the school for three years after they have been audited.
10. YOU NEED TO MAINTAIN GOOD ACCOUNTING RECORDS FOR YOUR OWN PROTECTION. Always document the receipt of funds and always obtain a receipt for the funds that you turn over to someone else.

NOTE: Form IN-129 "application for Fundraising Event" needs to be turned in **before** the event to the Director of Fiscal Services. When approved, a copy will be returned to the originator. When the fundraising event is over, the school will return a copy, along with a completed form IN-130 "Income Statement of Fundraising Activity" to the Director of Fiscal Services.