

FUNDRAISING, DONATIONS AND SPONSORSHIP POLICY

Approver: Board

Owner: Principal

Last Reviewed By: Board

Next Review Date: June 2019

1 Purpose

- 1.1 The Fundraising, Donations and Sponsorship Policy considers the following four scenarios under which Melbourne Montessori School ("MMS") is involved in or is the recipient of fundraising, donations and sponsorship:
 - 1.1.1 Members of the MMS community and groups associated with the school seek to raise funds to support the school and its purposes.
 - 1.1.2 Members of the MMS community, including students, are involved in raising funds for charitable causes.
 - 1.1.3 MMS receives financial or in-kind donations from organisations and groups associated with the school.
 - 1.1.4 MMS accepts sponsorship from external organisations for which the school receives financial or in-kind benefit in return for that organisation being permitted to market or promote their product or service.
- 1.2 The following fundraising schemes are out of scope for The Fundraising, Donations and Sponsorship policy. Fundraising for:
 - 1.2.1 School Buildings or the Library
 - 1.2.2 The Scholarship Fund
 - 1.2.3 Melbourne Montessori School Foundation
 - 1.2.4 The Community Finance Fund
- 1.3 The policy sets out the principles and framework governing the school's approach to fundraising, donations and sponsorship. The policy, together with the procedural documents listed in section §9, must be read and understood by all those who are engaged in fundraising, or in the giving and receiving of donations or sponsorship.

2 Principles

- 2.1 The principal, teachers and other school staff are held to a high standard of care in relation to students. The duty is non-delegable, meaning that it cannot be assigned to another party. In discharging its non-delegable duty of care, the school is required to take account of the diversity of all children, including the needs of Aboriginal and Torres Strait Islander children, children from culturally and linguistically diverse backgrounds, children with disabilities, and children who are vulnerable.
- 2.2 MMS is committed to child safety and has a zero tolerance of child abuse.
- 2.3 In relation to this policy, MMS will only engage with organisations whose values and ethics are consistent with those of MMS as set out in the school's mission:
 - provide excellence in Montessori education from birth to eighteen years
 - provide an enriched and welcoming learning community that embodies the Montessori principles of respect for self, respect for all others including the development of intercultural understanding, respect for the environment as well as respect for our country's freedoms and democratic principles

- nurture, inspire and support each person's individual development
 - provide a safe environment that enhances the safety and well-being of all
 - foster the growth of self-confidence, independence, self-discipline, an inquiring and active mind, personal and social responsibility
 - foster every child's innate love of learning and to make their introduction to education a joyful and purposeful start to a journey of life-long learning.
- 2.4 Fundraising, donations and sponsorship activity must not involve illegal or proscribed organisations, political parties, tobacco companies, gaming venues, companies primarily involved in the sale/promotion of alcohol or firearms, and organisations deemed by the school to be involved in offensive or inappropriate activity.
- 2.5 The purpose of any fundraising activity, donation or sponsorship must be clear and transparent so that members of the school community can have full confidence in the motivation of the school and the external organisation in participating in such activity.
- 2.6 When entering into any fundraising activity, MMS will be mindful of the need to prioritise the core educational purpose of the school. This may require the need for MMS to make decisions to restrict the number and scale of fundraising activities. The school will also be sensitive to the finite resources (both financial and time) available within the school community.
- 2.7 By engaging in fundraising for or by accepting donations or sponsorship from an external organisation, MMS does not endorse the organisation or its activities, services or products.
- 2.8 All donations and sponsorship arrangements will be considered on merit, and decisions will be made on an individual basis.
- 2.9 No fundraising activity, donation or sponsorship arrangement will be used to unduly encourage or pressurise students, staff or parents to purchase or engage with the activities, services or products that are offered by the external organisation.
- 2.10 No fundraising activity, donation or sponsorship arrangement will require the disclosure of the names or addresses held by the school to an external organisation unless the individual's consent is sought.
- 2.11 MMS will periodically communicate the following documents to the school community:
- 2.11.1 the annual fundraising and events plan;
 - 2.11.2 the annual report to the School Board summarising the school's fundraising, donations and sponsorship activities.

3 Aims of the policy

- 3.1 To set out the basis on which
- 3.1.1 Members of the MMS school community and groups associated with the school seek to raise funds to support the school and its purposes, for example:
 - (i) The parent association quiz night raising funds for playground equipment
 - 3.1.2 Members of the MMS community, including students, are involved in raising funds for charitable causes, for example:
 - (i) A parent/child activity such as a cake stall in support of the Good Friday Appeal
 - 3.1.3 MMS solicits or receives financial or in-kind donations from organisations and groups associated with the school, for example:
 - (i) Business and community groups, e.g. Rotary, donate money to buy books for the library
 - (ii) MMS submits a grant application to a philanthropic trust with an interest in supporting educational projects

- 3.1.4 MMS accepts sponsorship from an external organisation for which the school receives financial or in-kind benefit in return for that organisation being permitted to market or promote their product or service, for example:

Local business sponsorship of the football team's kit in return for them having their logo on the kit.

4 Legal and regulatory basis for compliance

- 4.1 Education and Training Reform Act 2006
- 4.2 Education and Training Regulations 2007
- 4.3 Fundraising Act 1998 (Vic)
- 4.4 Privacy Act 1988 (Cwlth)
- 4.5 Privacy and Data Protection Act 2014 (Vic)

5 Factors to be considered in relation to fundraising, donations and sponsorship:

In addition to the principles as set out in §2, the following will be taken into account:

- 5.1 When members of the school community and groups associated with the school seek to raise funds to support the school and its purposes:
 - 5.1.1 Fundraising activities by members of the school community or groups associated with the school may take place only with the prior approval of the principal;
 - 5.1.2 Priority will be given to activities and events that draw the school community together in a shared activity and that potentially provide a learning activity for children;
 - 5.1.3 Decisions as to the focus of the fundraising (i.e. the aim of the particular project) will be made by the Principal with Board consultation as necessary because they are in the best position to determine the funding priorities for the school;
 - 5.1.4 Priority will be given to fundraising where the focus of the fundraising is likely to benefit a large number of students and which otherwise the school may not be able to afford;
 - 5.1.5 Although participation in fundraising activities is voluntary for parents, staff and students, a credit for the Parent Involvement Levy can be achieved by participating in fundraising activities;
 - 5.1.6 A fundraising activity must not result in any member of the school community benefitting materially or personally from the activity, except in terms of a credit against the Parent Involvement Levy;
 - 5.1.7 Permission and instructions must be obtained from the Victorian Commission for Gambling Regulation when raising funds by means of a raffle or bingo or other minor gambling activities.
- 5.2 When members of the MMS community, including students, are involved in raising funds for charitable causes:
 - 5.2.1 The charitable object must be an ACNC registered charity
 - 5.2.2 The registered charity should be asked to provide written information as to what percentage of each dollar goes to the charitable cause;
 - 5.2.3 The fundraising activity and the charitable object should be age-appropriate;
 - 5.2.4 Fundraising activities for charitable causes by members of the MMS community, including students, may take place only with the prior approval of the principal. The principal, in making such decisions will take into account the impact of the fundraising activity on the core educational business of the school and may, at their own discretion, place limits on the number of fundraising activities undertaken each term;
 - 5.2.5 Although the impetus, planning and implementation of student-led fundraising activities will be encouraged, each activity must have a designated member of staff whose responsibility is to oversee any health and safety issues and the handling of money.

- 5.3 When MMS receives financial or in-kind donations from organisations and groups associated with the school:
- 5.3.1 Such financial or in-kind donations are given without any expectations as to reciprocal rights or benefits;
 - 5.3.2 Financial or in-kind donations should be declared consistent with regulatory requirements;
 - 5.3.3 The motivation for financial or in-kind donations from an external organisation should be transparent and may include the desire to:
 - (i) encourage cohesion between the school and the community;
 - (ii) enter into partnership with the school;
 - (iii) acquire professional and personal satisfaction from contributing to education and the local community;
 - (iv) develop a positive status or increased visibility within the community.
 - 5.3.4 The Principal in consultation with the Board reserves the right to refuse a financial or in-kind donation.
- 5.4 When MMS accepts sponsorship from an external organisation for which the school receives a financial or in-kind benefit in return for that organisation being permitted to market or promote their product or service:
- 5.4.1 The organisation or group from whom such sponsorship is received must be of high standing within the community;
 - 5.4.2 The sponsorship must be designed to support the school's core educational program;
 - 5.4.3 The benefit(s) given to the sponsoring organisation (e.g. public acknowledgements, logo placement and signage, naming rights, placement of web links, opportunities to network, placement of articles in targeted publications) must be transparent and declared within the Agreement Business Plan or Memorandum of Understanding.
 - 5.4.4 The level of benefit and/or acknowledgement of the sponsoring organisation must be proportional to the school's accrued benefit;
 - 5.4.5 The acceptance of the sponsor's products or services will not give the sponsor any rights in relation to the school or student activities;
 - 5.4.6 All sponsorship arrangements will be reviewed on an annual basis;
 - 5.4.7 Sponsorship may take place only with the prior approval of the School Board. The issuing of naming rights to an asset, event or initiative requires the prior approval of the School Board.
- 5.5 When MMS agrees to become involved in fundraising, donations or sponsorship with an external organisation, the school will create an Agreement Business Plan or Memorandum of Understanding in relation to each agreement. The Agreement Business Plan will assess the criteria and priority given to the agreement, an analysis of the financial impact of the agreement and an analysis of the educational and community benefit of the agreement.

6 Complaints

Complaints in relation to this policy will be handled through the school's Complaints Policy.

7 Roles and Responsibilities

- 7.1 The School Board is responsible for
- 7.1.1 Determining this policy and approving any amendments on an annual basis
 - 7.1.2 Approving sponsorship arrangements including the issuing of naming rights to a sponsoring organisation.

- 7.2 The principal is responsible for
- 7.2.1 Ensuring the core educational purpose of the school is prioritised over fundraising activities. This is likely to take the form of an annual fundraising and events plan and may require the need for the principal to make decisions to restrict the number and scale of fundraising activities.
 - 7.2.2 Approving fundraising activities by members of the school community or groups associated with the school to raise funds to support the school and its purposes in consultation with the Board as necessary;
 - 7.2.3 Approving the focus of fundraising activities for the school in consultation with the Board as necessary;
 - 7.2.4 Approving fundraising activities by members of the MMS community, including students, to raise funds for charitable causes;
 - 7.2.5 Deciding to refuse a donation in consultation with the Board;
 - 7.2.6 Creating an Agreement Business Plan or Memorandum of Understanding in relation to fundraising, donations or sponsorship engagements with external organisations.
 - 7.2.7 Maintaining a record of all fundraising, donations and sponsorship activities for review by the School Board on an annual basis.

8. **Linked with**

- 8.1 Child Safe Standards Policy
- 8.2 Privacy and Confidentiality Policy
- 8.3 Health and Safety Policy
- 8.4 Hire of School Facilities by Others Policy
- 8.5 Complaints Policy
- 8.6 Parent Involvement Levy

9. **Procedural Documents**

- 9.1 An annual fundraising and events plan setting out details of the proposed fundraising activities
- 9.2 An annual report to the School Board and school community summarising the school's fundraising, donations and sponsorship activities for the year
- 9.3 Checklists:
 - 9.3.1 Fundraising for charitable causes
 - 9.3.2 Donations and Sponsorship checklist
 - 9.3.3 Fundraising by the school community for the school
- 9.4 Application form for students to use when planning to fundraise for a charitable cause
- 9.5 Donation Agreement or Memorandum of Understanding
 - 9.5.1 Clear and transparent reasons for the donation from the donor's perspective
 - 9.5.2 Clear and transparent reasons for the donation from the school's perspective
 - 9.5.3 Defined roles and responsibilities
 - 9.5.4 Clearly articulated terms and conditions
 - 9.5.5 A clear statement as to how any donated funds are to be spent or benefits-in-kind to be used
- 9.6 Sponsorship Agreement or Memorandum of Understanding
 - 9.6.1 Clear and transparent reasons for the sponsorship from the sponsor's perspective
 - 9.6.2 Clear and transparent reasons for the sponsorship from the school's perspective
 - 9.6.3 Defined roles and responsibilities
 - 9.6.4 Clearly articulated terms and conditions
 - 9.6.5 A clear statement as to how any sponsorship funds are to be spent or benefits-in-kind are to be used

9.6.6 The duration of the sponsorship with interim reviews as appropriate

9.6.7 Termination conditions

9.6.8 An annual evaluation process

10. **Policy Review**

The School Board will approve any amendments to this policy and monitor its implementation on an annual basis.

REVIEWED 2018