

**Maria Montessori Academy**  
**Administrative Policy - Fundraising**

Adopted by the MMA Board of Directors on November 27, 2023

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The principal has the responsibility to ensure that all fundraising events follow this administrative policy.

**A. Planning**

1. Fundraising events should be jointly planned by MMA Administration (principal and/or delegate(s)) and the MMA Parent Group. All events must have clearly stated purposes for the use of the funds raised and a jointly developed process to allocate the funds.
2. All fundraising events must be in compliance with the MMA Board Fundraising Policy (Appendix A).

**B. Approval**

1. All fundraising events require approval at least four (4) weeks in advance;
2. The principal and/or delegate(s) approves all fundraising events aiming to raise less than \$5,000 per event;
3. The following events require approval from the principal and the MMA Board:
  - 3.1. Events aiming to raise more than \$5,000 per event;
  - 3.2. Any donations, sponsorships, or partnerships connected in any way to any businesses, corporations or external parties;
  - 3.3. Events which fall under provincial licensing authority such as bingos, casinos and lotteries; and
  - 3.4. Events that will serve, sale, advertise, or auction alcohol.
4. Key approval considerations are in Appendix B.

**C. Reporting**

The principal and/or delegate(s) shall report on the participation levels and financial outcomes of all fundraising events to parents, students, MMA staff within two (2) weeks thereafter, and to the MMA Board in the following board meeting. Students' personal identifiable information shall not be released.

**D. Prohibitions**

1. The serving, selling, advertising, or auctioning of tobacco, vaping products or any legally prohibited substance;
2. Partisan or political advertising; and
3. Rewards, prizes, commissions, any direct or indirect compensation, or benefits for any participants including but not limited to parents, families, students, teachers, MMA staff, Parent Group members, MMA Board members and volunteers.

## **Appendix A – MMA Board Fundraising Policy**

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### **Board Policy Statement**

1. The MMA Board supports fundraising for events that are for the best interests of the school and are consistent with the school's values and policies, the MMA Board approved fundraising priorities, all applicable laws and the Canada Revenue Agency fundraising rules and guidelines for registered charities.
2. The MMA Board endorses the school administration (principal and/or delegate(s)) to collaborate with the MMA Parent Group on all fundraising events.

### **Board Policy Application**

1. Fundraising must not interfere with school programs and shall be conducted with consideration to student safety and the impact on the school community. Participation in fundraising events is strictly voluntary;
2. The MMA Board sets the short and long-term fundraising priorities for MMA;
3. All fundraising events must have the prior approval from the principal, and the MMA Board if applicable. Events aiming to raise more than \$5,000 per event require both principal and MMA Board approvals;
4. Funds may be raised for the following purposes:
  - a. supplies, equipment or services not funded by government grants, such as extracurricular band equipment and audio-visual equipment;
  - b. ceremonies, awards, plaques, trophies or prizes for students;
  - c. school long-term capital projects; and
  - d. charities.
5. Funds may not be raised for the following purposes:
  - a. items or projects funded by government grants such as core learning materials;
  - b. goods or services for employees, where such purchases would contravene the School Act or MMA rules and regulations regarding conflict of interest;
  - c. administrative expenses not associated with fundraising events;
  - d. events that do not directly support MMA students or MMA;
  - e. religious, partisan political events, groups or candidates, or personal beliefs; and
  - f. projects or expenditures declined by the MMA Board.

## Appendix B – Key approval considerations

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1. Event purpose
  - 1.1. Is the event for the best interests of the school and is consistent with the school's values and policies, the MMA Board approved fundraising priorities, and all applicable laws and Canada Revenue Agency fundraising rules and guidelines for registered charities?
  - 1.2. Does the event directly support MMA students or MMA?
  - 1.3. Is the event age appropriate for the students who will be involved?
2. Financial analysis
  - 2.1. Is the event budget reasonable?
  - 2.2. Is the event financially viable and worthwhile in light of the efforts and expenses involved?
  - 2.3. Will the event require MMA to issue tax receipts? What are the tax and risk implications to MMA?
  - 2.4. Is fund allocation in place?
3. Risk management
  - 3.1. Has an assessment been completed? Are risk mitigating strategies in place?
  - 3.2. Are the residual risks acceptable to the Parent Group, Administration and the MMA Board?
  - 3.3. Are policies and procedures in place to manage potential risks such as conflicts of interests, financial management, anti-fraud, etc.?
  - 3.4. Is the in-place insurance coverage sufficient for the event? If not, will additional coverage be purchased? Will there be any uninsured activities at the event?
4. Resources requirements
  - 4.1. Will there be sufficient volunteers for the event?
  - 4.2. How much MMA staff involvement is required?
  - 4.3. Does the event require any school resources? Will MMA be compensated?
5. Is a communication plan in place, and is the plan sufficient?