

WEST VALLEY SCHOOL DISTRICT

Fundraising Checklist

Prior to Event

- Decide how the anticipated proceeds will be spent and indicate that in the club minutes.
- Decide who will handle the money and sign contracts (school group, booster group, parent organization). This will help determine sponsorship.
- If it is a WVSD event, complete the Fundraising Request Form.
 - Give form to ASB Advisor, ASB Vice President or Senatorial Secretary prior to the next scheduled Senate meeting for approval BEFORE starting fundraiser.
 - Get signatures: ASB Advisor, club/team advisor/coach, club/team officer/leader.
 - Return copy of signed request form to coach/advisor in charge of activity. After approval, place the form in the club notebook attached to the minutes from that meeting.
 - Original form will be kept on file with the ASB Advisor.
- After approval, student leader/advisor/coach obtains the necessary forms to carry out the fundraiser (*i.e. parent permission to sell, fundraiser check-out form, etc.*).
- Advisor/student leader obtains necessary forms associated with the activity. Forms are located in the main office with the ASB Bookkeeper or in the ASB Advisor's classroom.
 - Purchase Order Request form. *Please allow up to 48 hours for processing – plan ahead!*
 - If a cash box is needed, notify ASB bookkeeper 2-3 days in advance.
 - Parent/Guardian notification form
 - If items are for resale, fill out the Resale Certification form so group doesn't pay tax on items.
 - Determine from vendor in writing if unused/unsold merchandise may be returned for a credit.
- Parent/Guardian notification form completed and returned to club/team advisor/coach PRIOR to student participation in fundraisers involving the sales of goods or services.
- When merchandise arrives, make an immediate and accurate inventory and put in file.

During Event

Advisor is responsible for following WVSD procedures regarding: fundraising, cash receipting, documentation of transactions, inventory control, safeguarding assets, tickets, reconciliation, etc.

(See ASB Manual, Section V, Fundraising Guidelines)

ASB Manuals are kept on file with the ASB Advisor and ASB bookkeeper.

MONEY MUST BE TRANSFERRED TO THE OFFICE BY 1 PM THE SAME DAY THAT STUDENTS BRING IT TO SCHOOL.

Use of noninstructional time is encouraged for fundraising promotion and management. When practical, these activities should take place before and after school and during lunch time. Appropriate instructional time should be limited to club activity periods.

After Event – Reconciling

- Advisor/Coach and club/team officers/leaders complete the fundraiser by ensuring that the following forms/documents are contained in the fundraiser file.*
 - Club minutes indicating the group/club's approval of fundraiser.
 - Fund Raiser Request form.
 - Purchase Order completed
 - Vendor receipt(s)
 - Inventory, Parent/Guardian Permission form, Resale Certificate, etc.
 - Inventory credit receipt (if applicable)
 - Complete Reconciliation form.

**Failure to do this within 2 weeks of the ending date of the fundraiser may result in the club/team not being approved for further fundraisers until it is completed*