



**The Education Foundation of the West Ada School District
Joint School District No. 2
Fundraiser/Program Procedures**

READ THE FUNDRAISER/PROGRAM PROCEDURES CAREFULLY

1. Fundraiser/Program donations cannot be accessed until the Foundation has received and approved a completed Fundraiser/Program Application. The form can be found here:
<http://westada.org/educationfoundation/resources>.
2. Due to IRS changes concerning 501 (c)(3) organizations, The Education Foundation will not accept individual donations from fundraisers that sell goods or services such as:
 - Cookie Dough
 - Wrapping Paper
 - Shirts or uniforms
 - Spirit Packs
 - Auction items in which the value is more than 10% of the donation amount
 - i.e.: \$100 purchase, value of goods or services can be no more than \$10
 - Remember, when running a fundraiser it is your responsibility to inform the donor of the value of goods or services received, as well as paying all applicable sales tax.
3. The Foundation will accept, process and receipt:
 - Donations to Read-A-Thons, Walk-A-Thons, etc.
 - Donations to "Thank a Teacher", programs, projects, Parent organizations, and school sanctioned sports and clubs.
 - Net Funds from auctions or goods/services fundraisers
 - Dues to Parent Organizations
4. The Foundation encourages you to use a direct-ask form for fundraising. Experience proves it is more effective and fruitful type of fundraising. If you have any questions on how to set up a direct-ask fundraiser, please call the Foundation office at 350-5039 and we will assist you.
 - Benefits include:
 - 99% of donation goes to your program, project or group
 - No need to order and track items—which is very time consuming
 - Most parents would rather give a straight donation than buy more "stuff"
 - Donations can come directly to the Foundation, which has bonded, insured staff processing donations and an independent Board of Directors overseeing the Foundation.
5. A current Fundraiser/Program Director must submit a Fundraiser/Program Application for an ongoing fundraiser/program account at the **beginning of each new fiscal year, July 1st**. The Fundraiser/Program Application must be completed and approved before proceeding with a fundraiser/program.
6. Information that must be conveyed to donors:
 - Solicitation materials must identify the purpose of the fundraiser (i.e. classroom supplies) and must be used for specified purposes only

- Donations are **non-refundable**
 - Donations may not be made or used for personal gain
 - Donor will receive a contribution receipt from the Foundation (for donations over \$25)
 - Instructions on how to complete the Designated Donation Form
 - Donations must be made using the Foundation Fundraiser/Program Form ([on website](#))
 - Donations are to be taken to the District Service Center
 - Donations can be stored overnight at the school with the secretary or bookkeeper.
7. A complete Fundraiser/Program Application must include the signature of both the Site Administrator and the Fundraiser/Program Director.
 8. The Fundraiser/Program Director and the Site Administrator will be notified, in writing, when the application has been approved or denied.
 9. If the application is approved, a fund account will immediately be established.
 10. A donation to the Foundation may be made in one of the following ways:
 - Check or money order, payable to The Education Foundation of the West Ada School District
 - MasterCard, VISA, Paypal – **Less applicable merchant credit card fees**
 11. The Foundation only accepts cash donation if the Fundraiser/Program Director, or their designated agent, delivers the cash and a written reconciliation of the deposit to The Foundation office at 1303 Central Drive Meridian. **A Foundation staff member will count the cash while the Fundraiser/Program Director or designated agent is present.** The Fundraiser/Program Director must attach a list of donors who gave cash, if known, so tax receipts can be prepared for the donors. If a list of donors is not provided, the Foundation will issue the Fundraiser/Program Director one receipt for the total of the cash contribution. Cash will not be accepted through interschool mail.
 12. The Fundraiser/Program Director must follow the Internal Revenue Services 501 (c)(3) guideline listed below:
 - The donation, as well any item(s) purchased with a donation, is not transferable to another teacher, program or school.
 - Donations are non-refundable
 - The donation cannot be used for West Ada (Joint School District No. 2) employee stipends, salaries, or wages.
 - The donation must be used as specified by the donor
 - The donation may not be made or used for personal gain. Example: A donor cannot donate to a school field trip/activity and specify it is for a particular student. The donation must be used to benefit all participants.
 13. If the Fundraiser/Program is supported by additional fundraising events not included on the application, the Fundraiser/Program Director must notify the Foundation office in advance, in writing, what the events are being held and the timelines in which they will be conducted.
 14. If the Fundraiser/Program Director designates another individual to access funds, the Fundraiser/Program Director must notify the Foundation office, in writing, who the designee is.
 15. The designee may not submit payment requests without the Fundraiser/Program Director's signature on each of The Education Foundation's Purchase Order, invoice, receipt, or other written requests for payments.

16. When a donor makes a donation, it must **immediately** be submitted to the Foundation office so the donor may be receipted in a prompt manner.

17. The Fundraiser/Program director will try to obtain an email address for each donor. Due to increases in paper/postage costs, the Foundation Office will send all receipts to them through the interschool mail and they will be responsible for mailing and/or distributing the receipts.

18. For information on how to access funds contact westadafoundation@westada.org

19. Accounts will be charged for insufficient checks. The Fundraiser/Program Director will be responsible for contacting the donor.

For information on how to access funds, review the Accessing Funds Procedures.