

Trillium Fundraising Policies and Supporting Material

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Introduction

Trillium has experienced a number of fundraising challenges and successes in its early years. Some of the challenges revolve around transparency of the activities (What's going on, who approved it, what's being done with the proceeds?) and information regarding the success of the activities (Was it successful? Was the result commensurate with the effort?).

This document represents the first step in making the fundraising activity expectations of the Board visible to all Trillium stakeholders. This is not a comprehensive fundraising structure; this is the first critical building block.

Terminology: Policy, Standard, Process

A Policy conveys the high level expectation of the board and should not change frequently. Policy does not specify criteria, methods, or process. E.g., "All houses must be painted." "Should" and "Must" are key words in policy definition: "should" provides more flexibility.

A Standard describes specific expectations or criteria around how the policy should be implemented. E.g., "Two colors of paint will be used, one for siding and one for trim."

A Process describes the specific steps needed to execute an activity in accord with policies and standards. E.g., "1. Hire painters. 2. Choose paint colors (two required). 3. Paint house."

Policies

Policy	Why?
The Director must approve all fundraising activities, for, at, or on behalf of the school.	This helps us ensure that our fundraisers are targeted to the school's current and long-term priorities, particularly those in the five year plan. This helps us prevent fundraising burnout or overload for students, staff, and donors. This helps us coordinate events so that they don't conflict or overlap on dates, target donors, etc. This helps us avoid any legal issues that may arise from a proposed fundraiser.
All fundraising activities should maintain alignment with the school's mission and vision.	This helps us ensure that events represent the school in a manner that supports the school's overall charter, vision and mission.
All fundraising activities will report their results to the board.	This helps us measure the success of different types of fundraising activities so that we can make the best possible fundraising decisions going forward.

The above three policies were approved by the board on August 8, 2008. All activities will need to go through the approval process, including those already planned as of August 8, 2008.

Standards

Approval

- “Activities” in the policy definition include: Events (e.g., a pledge drive), Activities (e.g., writing a grant, soliciting an individual donor), and ongoing sources (e.g., scrip)
- Sponsors will complete request forms (provided within this document) and submit via e-mail to the Director and a Finance representative of the board (currently Stephanie@trilliumcharterschool.org and jhindes@trilliumcharterschool.org)
- Activity/Event requests in support of a major program (e.g., Kids for Kenya, Japan, Garden) should be accompanied by a program overview page
- Activity/Event requests should be submitted by October 1 of the school year or at least four weeks before the activity
- Fundraising activities must comply with local, state and federal law, where applicable
- As we develop standardized approval criteria, they will be published for future guidance and use
- All requests will be kept on file at the school

Alignment

- As we develop standardized alignment criteria, they will be published for future guidance and use

Reporting

- At activity completion, Sponsors will complete report forms and submit via e-mail to the Director and a Finance representative of the board
- Activities taking longer than a month to complete will complete ongoing status forms and submit via email to the Director and Finance representative of the board monthly
- Report records will be kept on file at the school
- The Finance board representative will summarize activities for the board monthly

Processes

Not yet documented. Processes needed:

- where and how to submit
- approval process
- filing / recording process

Trillium Charter School - Fundraising Event/Activity Request
To be completed by Sponsor by 10/1 of school year, or at least 4 weeks prior to event

Event/Activity Name:	
Date Request Submitted:	Desired Activity Date:
Sponsor/Coordinator:	
Proceeds go to / Program:	

Goals (e.g., amt. money needed, presence in community, new donors identified, other):
Volunteer time needed (list expected student, staff, or parent labor needed, in hours):
Expected money to spend (list cash costs, such as equipment rental or food):

Sponsor Signature:	Date:
Director Approval:	Date:

Fundraising Event/Activity Results – To be completed after event

Did activity meet goals? What % of goals were met? List \$ amounts raised before costs.
Volunteer time used (list student, staff, or parent labor used, in hours):
Actual money spent (list money spent, such as equipment rental or food):

Trillium Charter School - Fundraising Event/Activity Status
(for ongoing activities or those with > 1 month of planning)
To be completed by Sponsor monthly

Event/Activity Name:	Date of this Status:
Expected Date:	
Sponsor/Coordinator:	
Proceeds go to / Program:	

Brief summary of progress or results over past month:

Brief summary of progress of activities next month:

Assistance needed:

Trillium Charter School - Fundraising Event/Activities - Program Overview
To be completed by Sponsor annually

Program Name:

Date Overview Submitted:

Program Sponsor/Coordinator:

Annual Fundraising Activity / Event Goals (e.g., amt. money needed, presence in community, other). For money goals, please describe the amount of money desired for the year, not the amount expected to be raised:

Planned Fundraising Events or Activities for the year (please list here, and complete fundraising event/activity requests for each):