



# **FUNDRAISING GUIDELINES**

Parent Engagement Groups

May 2025

## INTRODUCTION

Catholic Schools Broken Bay (CSBB) recognise the vital role that parent and carer volunteers play in building strong, engaged school communities enriched by diverse skills and experiences. Through service, we celebrate this diversity and foster an inclusive environment where every contribution is valued.

Fundraising can offer a meaningful way for parents and carers to support and engage in their school, fostering generosity and compassion while shaping students into selfless individuals. However, its benefits must be balanced with the time, effort, and financial impact on families.

***Catholic Schools Broken Bay has no expectation or obligation for our parents/carers to fundraise at any of our schools.***

The following guidelines have been written to provide a framework to support our System Leaders and Parent Engagement Groups to plan and execute fundraising activities. They also provide governance and guidance on transparency, accountability and responsible stewardship of monies raised, ensuring funds are allocated to purposes that align to our educational mission and comply with relevant regulatory guidelines.

Parents and Friends (P&Fs) and Parent Engagement Groups (PEGs) have no legal identity separate from the school. These groups are consultative bodies established by the principal, who is responsible for carrying out the policies and directives of CSBB. As a result, P&Fs and PEGs have no authority in the day-to-day operation or management of the school and/or its funds. Where a P&F or PEG operates under a governed model, the CSBB P&F Constitution provides further guidance for their operations.

Specifically, Parent Engagement Groups:

- do not have the authority to enter into contracts on behalf of the school (whether under its own name or otherwise)
- are prohibited from distributing any income or assets, either directly or indirectly, to its members
- are accountable to the Principal.

## FUNDRAISING PRINCIPLES

Any fundraising activity must:

- be conducted in consultation and planned with the approval of Principal as the Responsible Person (School principals are considered the "Responsible Person" with overarching responsibility for school fundraising activities, including financial accountability and health and safety).

- be an inclusive work of the school community, where all members are welcomed to contribute, and not compelled.
- not conflict with the interests or values of students, parents, the school, and our Catholic ethos
- be transparent and conducted with integrity.
- have a clear purpose and intent, which is communicated to the school community.
- be conducted for the purpose of fundraising for the school, aligned with the purposes outlined below.

A fundraising activity cycle must not exceed 2 years.

The procurement of any goods or services whether as part of the fundraising activity or from its proceeds, will be governed by CSBB’s financial and operational delegations, and CSBB’s procurement and financial management policies and procedures.

## **OVERVIEW**

Any fundraising activity should be planned in consultation with the principal and should align with the school’s vision, always considerate of the community’s ability to raise funds.

The Principal has the authority to determine the form and purpose of any fundraising activity and to determine whether it is appropriate for such a fundraising campaign to progress or cease at any time.

## **FUNDRAISING PURPOSE**

The purpose of any PEG fundraising activity should be to promote and support parent and carer engagement. Any funds raised must be for the school to facilitate the purchase of resources or learning experiences that support student learning, growth, or wellbeing, or improve the recreational facilities for students at the school.

Examples of resources and experiences:

- PE/sport Equipment
- Library Resources
- STEM Resources
- Decodable Readers
- Learning Experiences
- Parent / Carer Resources to support students learning.

Recreational facilities may include playgrounds, shade structures, Covered Outdoor Learning Activities (COLA) and other playground fixtures (seating, sport equipment infrastructure (basketball/netball/soccer goal posts), filtered bubblers etc.).

The following fundraising purposes are **outside** the scope of PEGS:

- Buildings or building improvements.
- Building infrastructure (including Air Conditioning)
- Major Landscaping
- Gifts for Staff (Funds raised by the P&F or parents must not be used to purchase staff gifts. All funds are to be used to support student learning, wellbeing, or to enhance school facilities)
- Charitable Fundraising (new policy being drafted)
- Individual Fundraising for families or individual students within the school e.g. overseas trips, elite sports excursions, family support fundraising

## **PLANNING FUNDRAISING ACTIVITIES**

PEGs should plan in collaboration with their Principal and agree on a list of fundraising goals that align with the purposes outlined above.

Fundraising activities to improve recreational facilities at the school must be managed by the School Principal in partnership with the CSBB Facilities Team. Appropriate scoping and costings are required prior to planning any fundraising activities to ensure:

- the scope and cost of the proposed works can be reliably estimated (the project value)
- any CSBB financial or operational considerations and planning requirements can be accommodated.
- sufficient lead time is allowed for any planning requirements (internal and external), or supplier lead times.

Once approval is provided by the CSBB Facilities Team for the proposed fundraising initiative, the Principal will then present to the PEG to ensure that the level of fundraising required is achievable. CSBB's Facilities Team will facilitate and run the program of work with regular communication and collaboration with the school Principal.

All stakeholders including students, parents and carers, and staff should have a clear understanding of the planned intention of the fundraising, including:

- Purpose / Objective
- Approach
- Timeline (fundraising activity cycle)
- Roles and Responsibilities

Fundraising collateral and promotional material must be approved by the principal before it is released in connection with any activity. The principal must also sign all correspondence sent in relation to the fundraising activity. Consideration should be given to prioritisation of environmentally friendly fundraising practice, aimed at reducing waste and minimising the use of single-use plastics.

### **Sponsorships**

To mitigate potential reputational risks, and misalignment with CSBB core values and ensure compliance with regulatory requirements, the use of corporate sponsorships for fundraising events or any other event being held at the school such as Mother's or Father's Day Breakfast, is not supported by CSBB.

### **Donations:**

A donation can be accepted by way of voluntary contribution of money or goods, without expectation of return or personal benefit. All donations should align with the values and mission of our Catholic community and be received in a spirit of generosity and support. When accepting donations, transparency and ethical considerations should be maintained to ensure fairness and inclusivity in fundraising efforts.

If a donation is received in support of a specific event or activity (e.g., a Gala Evening), acknowledgement of the donation should occur at the event itself or shortly thereafter. Recognition must not be given prior to the event for the purpose of endorsement or advertising, to avoid promoting the donor in a commercial manner.

### **Bequests**

Bequests are not considered fundraising, if you are advised that someone wishes to acknowledge the work that your school does by way of a bequest, please refer them to CSBB.

### **Community Grants**

All applications for any Community Grants must be facilitated and processed centrally through Catholic Schools Broken Bay.

### **Alcohol at School Fundraising Events**

CSBB strictly prohibits the presence and consumption of alcohol at any school fundraising function where students from any school are present (with the exception where students are in attendance as part of work experience in a food services capacity).

Alcohol is not permitted at school fundraising events held during what is reasonably considered to be school hours. This applies to all employees, students, visitors, and any other individuals using school premises.

The Principal has the discretion to determine whether alcohol may be served at P&F or PEGs events.

Where parents and guests provide their own alcohol at a functions, schools will include a statement in all communications regarding the event outlining the expectations regarding alcohol.

At a minimum these should included:

- Alcohol consumption should be kept to a minimum
- Kept within recognised safe drinking limits
- Schools reserve the right to ask guests to leave any school function (at school or associated with the school) if their behaviour is deemed unacceptable.

For informal parent gatherings such as when class or year groups organise off-site parent dinners or socials, and these are not endorsed by the school (and staff are not present in their capacity as school staff), the licensee of the venue determines alcohol service and parameters.

## **FINANCIAL MANAGEMENT AND CONTROLS**

The funds raised must be used only for their intended purpose. Appropriate controls must be in place for any fundraising activities, and the recording and management of associated financial transactions.

### **Parent and Friends Associations**

Fundraising by the P&F must be conducted in accordance with the P&F Constitution Guidelines and:

- maintain transparency and accurate record-keeping.
- minimise cash handling, utilise CSBB preferred payment gateways (QKR! Compass Pay and EFTPOS).
- all proceeds must be banked into the P&F's designated bank account in full. Funds raised must NOT to be banked into personal bank accounts. Any cash should be stored securely in the school safe until banked by CSBB Banking contractor.
- ensure the Principal with an authorised P&F signatory approve all financial transactions.
- provide regular financial report to the P&F and school community.

At the conclusion of the event or fundraising activity cycle, the funds should be transferred to the school. If multiple events are required for the purpose of raising sufficient funds for the intended purpose, the funds will be transferred to the school at the conclusion of each event, and held in trust by the school until performance obligations are met. At this point, the proceeds will be recognised as a donation.

## **Parent Engagement Group**

Where the PEG is not governed by the CSBB P&F Constitution, financial transactions will be processed by the school, in accordance with CSBB financial and operational delegations, procurement and financial management processes. Income and expenses will be recorded in a separate account on the school's balance sheet for the PEG. At the conclusion of the fundraising activities, the result will be recorded as a donation in the school's financial accounts. Financial reports are made available to the school principal for reporting to the school community.

## **COMMUNICATION & REVIEW**

### **Communication**

Fundraising progress, outcomes, and fund allocation should be regularly shared with the school community.

The effectiveness of fundraising should be reviewed, with feedback from students, parents and carers, and staff to support continuous improvement.

## **TRANSPARENCY & COMPLIANCE**

### **Children and Fundraising Activities**

The [Charitable Fundraising Regulation 2008](#) outlines several special requirements relating to the involvement of children in fundraising activities.

### **Safety and Risk Management**

Any fundraising **event** planned and run on behalf of the school, must include a Risk Assessment, particularly those being held on school premises or where students will attend.

- Risk assessments for Fundraising activities are to be completed and provided to the principal for review and approval. No event is to proceed unless the risk assessment is completed to the satisfaction of the principal. The principal must also be given updates and assurance that all required safety measures will be in place. A risk assessment form must be obtained from the school principal.
- Ensure compliance with relevant health and safety regulations during events, particularly those involving food, outdoor activities, or high levels of participation.
- Ensure compliance with guidelines on alcohol at school functions and events i.e. alcohol must not be consumed at any functions or events where students are present.

### **General Legal and Regulatory Considerations**

- Any fundraising activity must take action to protect the privacy and personal information of students, parents / carers, and participants (in accordance

with privacy laws and Catholic Schools Broken Bay [Privacy Policy](#) and [Standard Collection Notice](#)).

- Fundraising needs to comply with relevant legislation, and where required, any necessary permits, licenses, or permissions for fundraising activities, should be obtained through NSW Fair Trading (particularly those involving public events or sales).
- All fundraising activity must be managed in accordance with the [Education Act 1990 \(NSW\)](#) in particular the 'not-for-profit' requirements of **Section 83C**. This becomes relevant when a school raises money to make donations to other parties. The Fundraising Guidelines provide that donations must be:
  - related to the education of students at the school;
  - collected from fundraising activities that are separate or discrete from a proprietor or school's normal sources of income (such a parent fees or government financial assistance); and
  - recorded as a third-party transaction and donated in a transparent manner which clearly records the beneficiary and the purpose of the donation.