

Topic:	Community Funding of Facility Enhancements
Effective:	September 2013
Cross-Reference:	Administrative Procedures: Fundraising in Schools; Corporate Partnerships/Sponsorships; Purchasing; School Generated Funds and School Council Funds; Travel and Expense Reimbursement Ministry of Education Fundraising Guideline
Review/Revision Date:	September 2017
Responsibility:	Superintendent of Business Services and Treasurer Superintendent of Facility Services

INTENDED PURPOSE:

The Halton District School Board encourages support of facilities enhancements that reflect the Board's mission and vision are supportive of the Board's strategic goals and objectives, enhance learning opportunities, and support student achievement.

This administrative procedure provides a consistent framework for the implementation of facility enhancements that will enrich the educational experience of students within the Halton District School Board.

PROCEDURES

Parameters:

The parameters for these projects must be consistent with Ministry Fundraising Guideline (Ministry of Education - 2012) which states that since the Province provides capital funding for the construction of new schools and additions, for repairs and renovations, and for the operation and maintenance of schools, including heating, lighting and cleaning, funds raised for school purposes are to be used to complement, not replace, public funding for education. It further states that capital projects supported by fundraising proceeds should:

- Be complementary to publicly funded education;
- Not result in an increase in the student capacity of a school; and
- Not result in a significant increase in school or board operating costs.

Additional parameters of the projects must ensure that:

- HDSB retains the authority regarding school facilities and the use of school facilities in keeping with the Education Act, Ministry of Education Guidelines, legislative compliance, and board policies and administrative procedures;
- HDSB has the sole discretion to determine which schools and/or facilities are suitable for the projects as well as to determine the eligibility of all potential community partners;
- All projects will be consistent with the board's strategic and multi-year plan, operational plan, and/or school improvement plan;
- The impact on staff, student or parental time, the school community and existing partnerships is considered and as a result a maximum of two major projects will be considered on an annual basis;
- Projects will be beneficial to the education of students and will not compromise or exploit students or staff;

- HDSB has a responsibility to address equity of student opportunity and acknowledges that communities have different needs, values and access to potential resources and opportunity for corporate involvement;
- HDSB will be responsible for the purchasing and donations of all materials and/or resources and the construction work associated with the project. All funds attributable for the purchase of materials/resources must flow through the board;
- Projects in excess of \$50,000 will require Board of Trustee approval. Projects less than \$50,000 will require Administrative Council approval;
- All Board Policies/Administrative Procedures apply to all fundraising projects. All students and volunteers must be made aware of applicable policies and procedures in advance of participating in the project;
- Fundraising target must be reached in advance of the commencement of any construction and/or purchases for the facility enhancement. Pledges do not count toward the fundraising project, only actual donations received will be considered;
- Board staff will not be involved in the solicitation of donations.

Process

Schools interested in a facility enhancement with a community partner should submit an “expression of interest” to Administrative Council by October or April of the school year. The submission, approved by the school Principal, would include a high level summary of the project including:

- Description of the proposed facility enhancement;
- Overview of the proposed partnership parameters;
- Expectations of the school and community partner;
- Preliminary budget including projected costs and offsetting revenues;
- Project timelines.

Administrative Council will review all submissions to assess viability of the facility enhancement and preliminary budget; projected timelines; and the impact on staff, student and parental time, the school community and existing board partnerships. A maximum of two major projects per year will be considered for implementation from all submissions received. Submissions that are “approved in principle” will proceed to the next stage.

For the submissions that are approved in principle, a detailed Facility Enhancement Fundraising Plan will be prepared by the school with input from the community partner, and appropriate HDSB central departments staff (i.e. Facilities Services, Business Services). The Plan will include the following:

- Mandate and membership of the committee;
- Scope of the fundraising initiative;
- Summary of projected costs (as determined by Facilities Services) for each component of the fundraising initiative;
- Action plan identifying objectives of the facility enhancement; roles and responsibilities of the principal, community partner, school community and volunteers, and HDSB central departments; projected timelines for the collection of funds and construction of the facility enhancement;
- Identification of fundraising activities and projected revenues, including estimate of projected revenues generated through corporate sponsorships, donations, and other fundraising initiatives;

- Identification of proposed sponsorship recognition parameters;
- Projection of expenditures (i.e. Marketing, advertising, fundraising, etc.) required to generate revenues;
- Identification of fundraising timeframe including time for reaching milestone amounts;
- Summary of communication and marketing plan;
- Identification of the intended use of donated funds in the event that the required fundraising target is not met. If this situation arises, all funds donated will be used to enhance the facility in some capacity and will not be returned to the donor. This must be included in the board report that approves the project and determined in advance of the solicitation of donations for this project.

The Facility Enhancement Fundraising Plan will be reviewed and approved by the Principal, Family of Schools Superintendent, and Administrative Council. Any project including expenditures in excess of \$50,000 must be approved by the Board of Trustees.

Once the Facility Enhancement Fundraising Plan is approved, a Facility Enhancement Committee will be formed with representation from the school, community partner, and appropriate central HDSB departments. The Committee will implement the action plan approved as part of the Facility Enhancement Fundraising Plan. The school Principal, on behalf of the Committee, will present a status report to Administrative Council on a quarterly basis. At the completion of the project, a final report will be prepared by the Committee and presented to Administrative Council evaluating the goals, outcomes, feedback from all applicable stakeholders, and recommendations for consideration of future board facility enhancements with community partners.