



The Montessori School Kingsley Inc.

FUNDRAISING, DONATIONS AND SPONSORSHIPS POLICY



Version Management

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1. INTENT

The policy sets out the principles and framework governing the School's approach to fundraising, donations, and sponsorships.

2. ORGANISATIONAL SCOPE

2.1 The scope of the policy extends to all those who are engaged in fundraising, or in the giving and receiving of donations or sponsorship.

2.2 The scope of the Fundraising, Donations and Sponsorship Policy applies to the following three scenarios under which The Montessori School Kingsley is involved in or is the recipient of fundraising, donations, and sponsorship:

2.2.1 Members of the School community and groups associated with the School seek to raise funds to support the School and its purposes (including fundraising being part of the student's curriculum).

- **For example:**
 - the Engagement and Communication Sub-Committee organises a School Scitech Night to raise funds for playground equipment
 - the lower secondary students' trip to Thailand
 - individual donations from members of the School (parents, staff, alumni).

2.2.2 Members of the School community, including students, involved in raising funds for charitable causes (third-party).

- **For example:**
 - a parent/child activity such as a cake stall in support of the homeless people in Perth.

2.2.3 The School receives financial or in-kind donations from external organisations.

- **For example:**
 - business and community groups, e.g., Rotary, donate money to buy books for the library
 - the School submits a grant application to a philanthropic trust with an interest in supporting educational projects.

2.3 The following fundraising schemes are out of scope for The Fundraising, Donations and Sponsorship Policy:

2.3.1 The Library Fund

2.3.2 Grants to the School by state, local and federal Australian Governments.

3. DEFINITIONS

TERM	DEFINITION
ATO	Australian Taxation Office
ACNC	The Australian Charities and Not-for-profits Commission (ACNC) is the regulatory authority for charities and not-for-profit organisations within Australia.
Bequest/Legacy	For this policy, the terms legacy and bequest are understood to have the same meaning: a donation of assets or cash via a Will.
DGR	Deductible Gift Recipients: organisations who can receive donations that are tax-deductible by the donor via the ATO.

Donation	A voluntary contribution to the School in which no benefit is received in return. The donation can be made by cash, cheque, credit card, debit card, direct debit, artwork, equipment, supplies, property, shares, and bequest.
Donor	Any individual, organisation or entity that makes a donation to the School.
Endowment	A donation made with the intention that funds are invested to support beneficiaries from the investment earnings.
Fundraising Activity	All activities undertaken by, or on behalf of, the School with the aim of soliciting or receiving donations.
Gift Agreement	A written agreement between the donor and the School setting out the terms upon which the donation is made, including the restriction of the donation.
Grant	The provision of financial assistance to the School from a grant-making philanthropic organisation.
School	The Montessori School Kingsley
Sponsorship	A process of donor management whereby the School maintains and develops the donor's support.
Workers	School staff, students, and board directors.

4. POLICY CONTENT

4.1 Principles

- 4.1.1 In relation to this policy, The School will only engage with organisations whose values and ethics are consistent with those of the School:
1. Respect: everything we do starts with a fundamental respect for the child, but we respect all life.
 2. Authenticity: we adhere to genuine Montessori practices and principles.
 3. Independence: we encourage self-reliance and resilience and treat every child as an individual.
 4. Mindfulness: we care for nature and advocate for sustainability and interactions with the natural world.
- 4.1.2 Fundraising, donations and sponsorship activity must not involve illegal or prescribed organisations, political parties, tobacco companies, gaming venues, religious organisations, companies primarily involved in the sale/promotion of alcohol or firearms, spreading misinformation and organisations deemed by the School to be involved in offensive or inappropriate activity.
- 4.1.3 Students, staff and members of the School will not derive personal gain from fundraising, donations and sponsorships.
- 4.1.4 The purpose of any fundraising activity, donation or sponsorship must be clear and transparent so that members of the School community can have full confidence in the motivation of the School and the external organisation in participating in such activity.
- 4.1.5 When entering into any fundraising activity, the School will be mindful of the need to prioritise the core educational purpose of the School. This may require the need for the

School to make decisions to restrict the number and scale of fundraising activities. The School will also be sensitive to the finite resources (both financial and time) available within the School community.

- 4.1.6 By engaging in fundraising for or by accepting donations or sponsorship from an external organisation, the School does not endorse the organisation or its activities, services or products. Fundraising, donations and sponsorships will be consistent with the School's non-commercial philosophy.
- 4.1.7 All donations and sponsorship arrangements will be considered on merit, and decisions will be made on an individual basis.
- 4.1.8 Fundraising activities by parent-led or external organisations should not be in direct competition to the School's fundraising activities
- 4.1.9 No fundraising activity, donation or sponsorship arrangement will be used to unduly encourage or pressurise students, staff, or parents to purchase or engage with the activities, services or products that are offered by the external organisation.
- 4.1.10 No fundraising activity, donation or sponsorship arrangement will require the disclosure of the names or addresses held by the School to an external organisation unless the individual's consent is sought.
- 4.1.11 As the School is a not-for-profit entity, a grant may be treated as a donation if the grant does not involve the return of any material benefit to the grant-maker.
- 4.1.12 The School will periodically communicate the following documents to the School community:
 - the annual fundraising and events plan
 - the annual report to the School Board summarising the School's fundraising, donations and sponsorship activities.

5. ACCOUNTABILITIES AND RESPONSIBILITIES

In relation to these guidelines, the following positions are responsible for:

ROLE	RESPONSIBILITY
Policy Owner	The Policy Owner, the Principal, has overall responsibility for the content of this Policy and its operation in the School.
Principal	The Principal is responsible for: <ul style="list-style-type: none">- ensuring that the requirements of this policy are implemented, monitored and reviewed- ensuring the core educational purpose of the School is prioritised over fundraising activities. This is likely to take the form of an annual fundraising and events plan and may require the need for the Principal to make decisions to restrict the number, scale and scheduling of fundraising activities- approving fundraising activities by members of the School

	<p>community or groups associated with the School to raise funds to support the School and its purposes in consultation with the Board as necessary</p> <ul style="list-style-type: none">- approving the focus of fundraising activities for the School in consultation with the Board as necessary- approving fundraising activities by members of the TMSK community, including students, to raise funds for charitable causes- deciding to refuse a donation in consultation with the Board- creating an Agreement Business Plan or Memorandum of Understanding in relation to fundraising, donations or sponsorship engagements with external organisations- maintaining a record of all fundraising, donations and sponsorship activities for review by the School Board on an annual basis.
Workers	Ensuring they understand the information presented in this policy.
Board Directors	<p>Board Directors are responsible for:</p> <ul style="list-style-type: none">- determining this policy and approving any amendments on an annual basis- approving sponsorship arrangements including the issuing of naming rights to a sponsoring organisation.

6. RELATED DOCUMENTS:

6.1 The policy is supported by the following procedures:

- Fundraising, Donations and Sponsorship Procedure

6.2 Policies that are relevant to the operation of this policy are as follows:

- Privacy and Confidentiality Policy

6.3 Other documents that are relevant to the operation of this policy are as follows:

- Charitable Gifts and Donations Register
- Third-Party Fundraising Application Form
- Third-Party Sponsorship Application Form
- Staff Code of Conduct
- Students Code of Conduct
- Complaints Policy and Management Process
- Communication Strategy