

Fund Raising / Facilities Usage Town Hall Meeting



Presenters:

Dr. Jesus Jara

Mr. Ken Gentile

June 2011

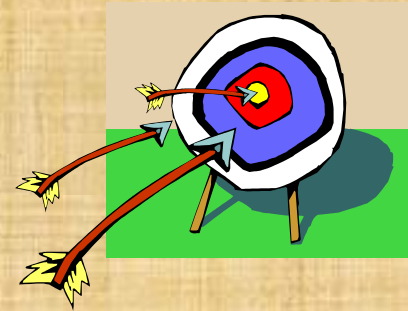
Fund-Raising / Facilities Usage

- **Presented @ School Board Workshop 2/15/11**
- **Goals and Objectives**
- **Benefits and Issues**
- **Implementation Strategy / Timeline**
- **Frequently Asked Questions**

Goals and Objectives

Benefits

- Objective Framework
 - Organization Definitions
 - Fund-Raising
 - Facilities Usage
- Greater Transparency
- Compliance with laws, regulations
- Current, up to date policies
- Improved systems to achieve objectives



Goals and Objectives (con't)

Issues

- Inconsistent treatment of organizations
- Subjective allocation of resources
- Confusion of authority
- Inability for organizations to plan
- Ineffective communication of changes
- Budget constraints
- Lack of cohesive vision and direction

Objective Framework

- **Organization Definitions**
- Fund-Raising
- Facilities Usage

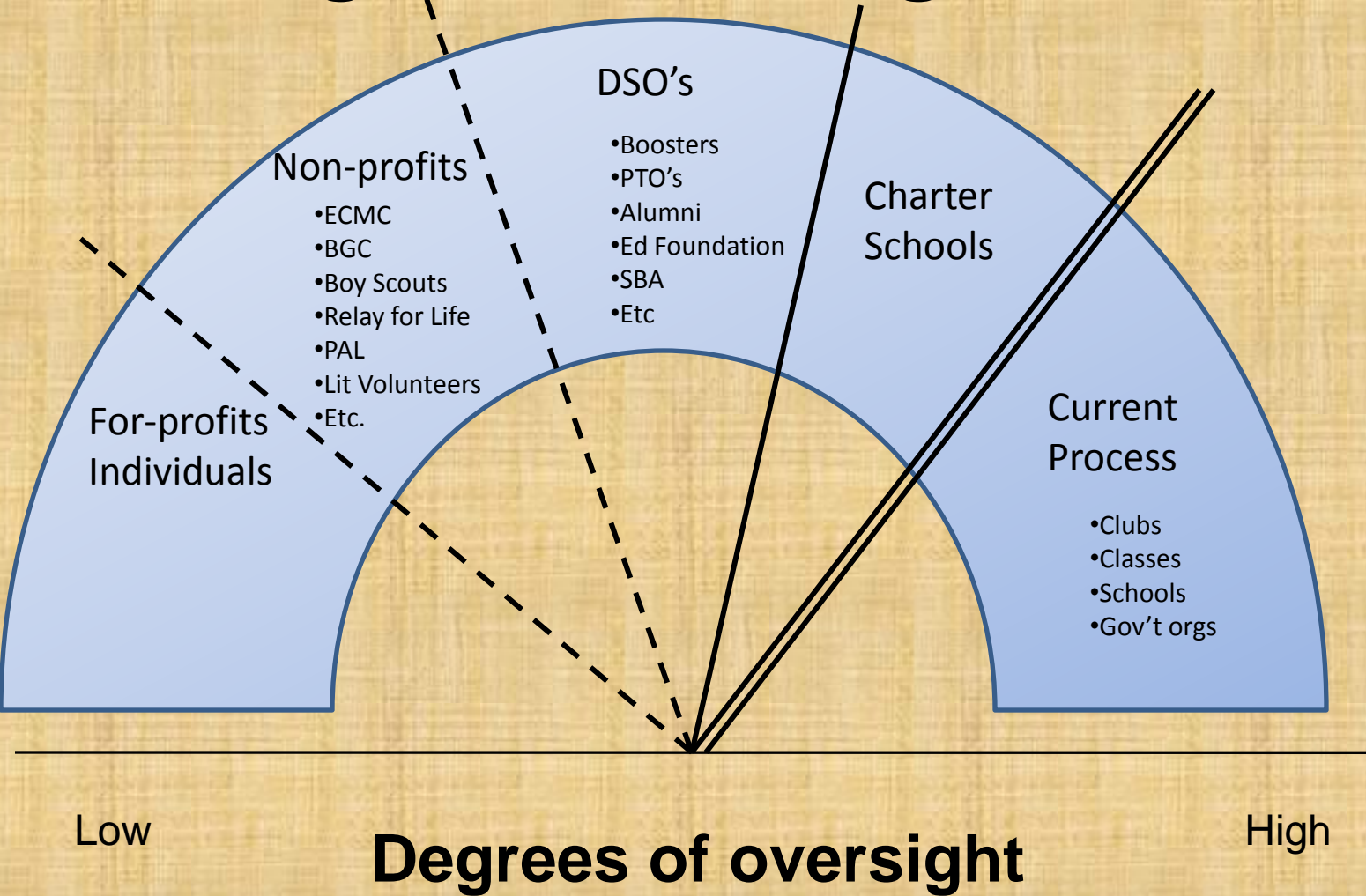


Current Organizations

- Sample List of organizations

CSHS PTO GLA PTA MHS Alumni KWHS Soccer Club
PAL ECMC MHS Soccer Boosters CSHS Football Booster
MHS Band Boosters Keys Soccer Club MHS Boosters SSE PTO
Churches LVA PKS Dance Education Foundation KWHS Golf Boosters
Keys Kids KLS PTA KWHS Baseball Boosters
SBA Boys Scouts FKCC
MFCU AMC KWHS Cheerleaders Boosters
City of Key West Boys and Girls Club

Organization Alignment

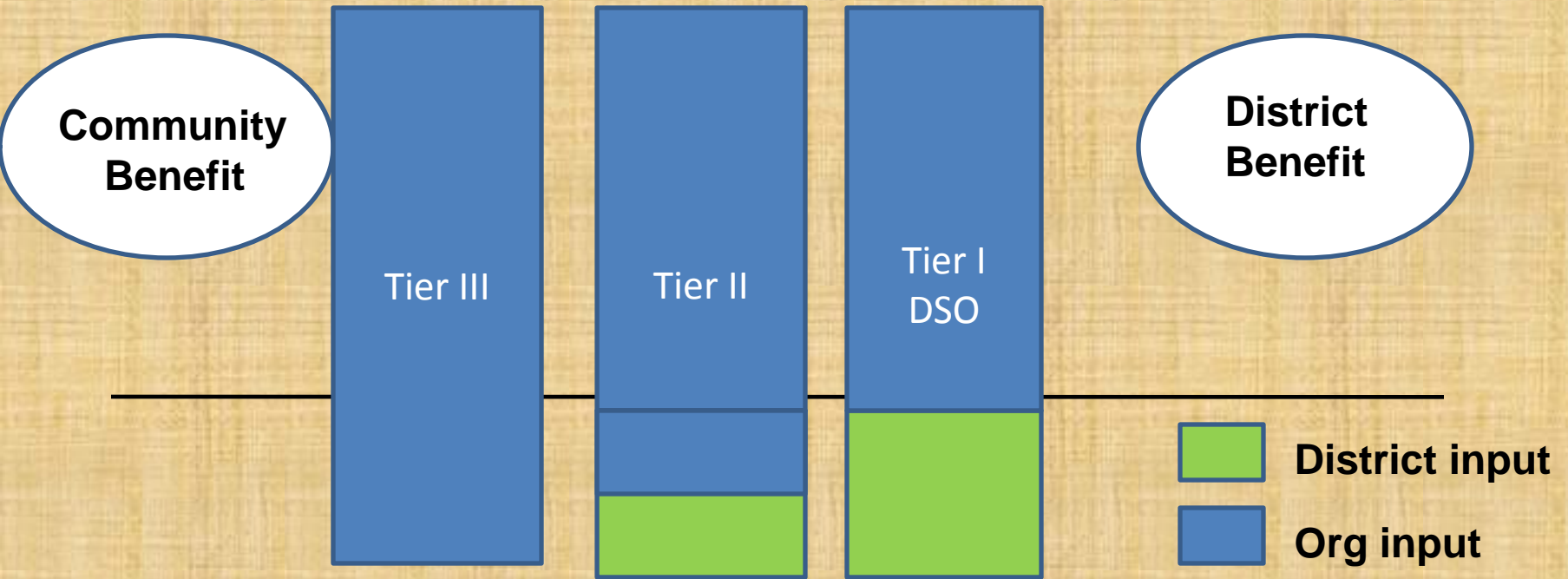


Organization Definitions (con't)

Major changes

- Alignment with District/School Goals
- Establish degrees of independence and oversight
- Use of tiers for nonprofits
- Effective use of District resources

Organization Impact



District Reimbursable Costs

0

50

100

- Custodial
- Electrical;
- Facilities
- Staff

Organization Requirements

- Maintain insurance (liability, fiduciary bond)
- Submission of bylaws
- Facility use agreement
- Annual goals, objectives and fund raising plan
- Volunteer screening
- Internal or external cash management
 - External requires monitoring and oversight

Objective Framework

- Organization Definitions
- **Fund-Raising**
- Facilities Usage



Fund Raising (con't)

Major changes

- District approval associated with approved events and organizations
- Monthly tracking and reporting of activity
- Increased oversight and reporting
- Compliance with School Board Policies and State Statutes

Objective Framework

- Organization Definitions
- Fund-Raising
- **Facilities Usage**



Facilities Usage - Equity

Criteria	Rank (1-6)	Weight (% or points)
Impact to kids (Direct, indirect, other)	1	30
Dollar / cash contribution	3	15
District / School goal alignment / Curriculum	2	25
Community service	4	15
In-Kind contribution	5	10
FTE /Grant money generation	6	5
Totals		100

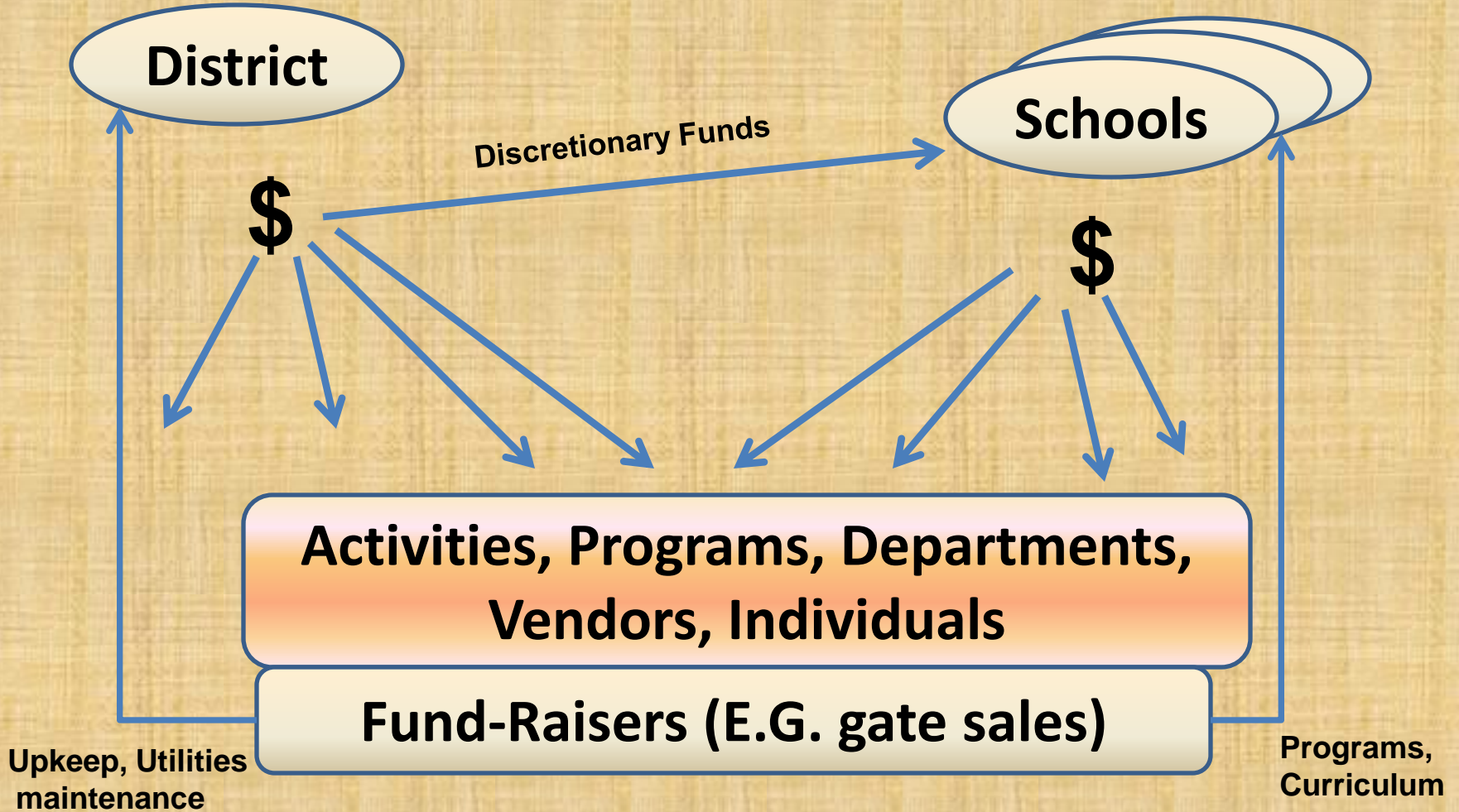
Tier I 75-100

Tier II 50-75

Tier III 0-50

Note: Weights revised 2/15/11by SB

Facilities Usage



Facilities Usage (con't)

Major changes

- Major revision of policy
- Direction from School Board on usage
- Application and use of tiers for non-profits
- Leverage District idle resources

Implementation Strategy / Timeline

Strategy

1. Continue improvement and monitoring of current / internal organizations - ongoing
2. Begin process of policy changes and discussions with DSO's, Boosters and PTO's (Town Hall, SAC etc.– six months (7/1/11))
3. Begin process to evaluate, score, educate and meet with nonprofits – 12-18 months (7/01/12)

Frequently Asked Questions

What is the SB desire for community use of District resources?

At the February 15 meeting the School Board gave direction that school expenditures/cost should be reimbursed. Billing for costs should not be profit generating. Expenditures incurred during the school day would not apply but expenditures incurred after school would be reimbursed. Expenses were also broken out between direct and indirect. Direct expenses include custodial, electrical, facilities and staff.

Frequently Asked Questions

What is the financial impact of implementing these recommendations?

During these economic times the School Board is facing unprecedented reductions in revenues. Partnering with outside groups is key to accomplishing School District goals and objectives. Clarifying policies and procedures in advance will help with budget and financial planning for all parties.

Frequently Asked Questions

How should benefits, results etc. be reported?

The revised policy and procedures needs to have measurements in place to ensure it is working properly. Meetings and surveys in advance, during and periodically after will help ensure the process is working as intended and determine feedback for improvement. Performance metrics should also be determined in advance and measured. All results should be reported to the school board and affected stakeholders.

Frequently Asked Questions

How best do we define and communicate process to stakeholders?

The first step in the process is through publically noticed town hall style meetings. In addition, posting on the web site, periodic training and public reporting of results through School Board, SAC meetings etc. would also prove beneficial. The end goal is a more transparent and public communication of goals and accomplishments which model best practice.

Frequently Asked Questions

What are the limits or cost constraints?

Schools and nonprofits share in being mission driven and not profit driven often resulting in limited resources. By partnering and communicating shared goals efficiencies can be maximized and shared costs minimized with the achievement of mutual goals.

Frequently Asked Questions

Is this a “clamping down” of outside organizations?

Despite what is headlined in the newspaper the school district is merely defining in policy and procedure what is happening well today as well as helping to educate and correct what may not be happening well. The end result is a better educated community and success for our children.

Frequently Asked Questions

Are there particular activities which are questionable?

The School Board currently has policies which prohibit alcohol and tobacco use and raffles or games of chance. Organizations which use a school's name, team name or logo create an undue risk to the district and in effect violate school board policy by promoting activities that are not promoted to children. Such activities must be approved at the discretion of the School Board or Superintendent.

Scenario1:

A booster club for a High School football team is a 501c3 named with the high school name (XYZ High School Football Booster Club) It is highly organized and possesses financial expertise on their board and wishes to retain custody of all cash collected from fund raising and donations received.

Scenario 1 Impact

According to policy 9211 the organization is regarded as school support organization and complies with school board policies. It can retain custody but must submit copies of:

- Bylaws //Facility use agreement (if applicable) //**
- Annual goals, objectives and fund raising plans //**
- Activities subject to Superintendent approval //**
- Volunteer screening if working directly with students**

as is with all support organizations plus the following for retaining cash custody and recordkeeping:

- Quarterly financial report with bank statement**
- Annual audit**