Steps to Request a Fundraiser (Parent Organizations Edition)
Fort Bend ISD
Updated July 2018

Parent organization fundraisers

The fundraiser request process is as follows:

1. In the menu, choose Fundraisers/New Fundraiser Request to begin a new fundraiser request or Fundraisers/Search to retrieve one that you have previously saved.

2. Save to finish later if you do not have all the required information ready.

3. Click "Submit for Approval" and an email will be sent to the principal for his/her review (it will be approved or denied, or you may be contacted with a request to modify or add additional information). Once submitted, you will be unable to edit the request. (If you ever need to make edits, ask for the status to be changed back to "not submitted.")

4. Once approved by the principal, the Assistant Superintendent will be notified for his/her review and approval. (If food is to be sold, served or distributed on campus, it will go to Child Nutrition first.)

5. Once all approvals are given, you will be notified by email and you may proceed with the fundraiser.

The Fort Bend ISD Fundraiser Request/Approval/Recap System
July 2018
activityfunddropbox@fortbendisd.com

Fundraisers

Fort Bend ISD requires that all fundraisers be reviewed and approved by the principal and assistant superintendent before being held. This allows the district to be sure that all appropriate laws and policies are followed and helps protect the district, clubs, and organizers from potential problems and scheduling conflicts.

A fundraiser should not begin before final approval (from the assistant superintendent) is given.

The submitter will receive a confirming email when the fundraiser is approved (or if it is denied).

For activity funds, following completion of the fundraiser, the submitting account sponsor will be asked to complete an online financial recap to document the financial results of the fundraiser. **This process is not required for parent organization fundraisers**.

The details of the fundraiser request will remain online and may be reviewed and reprinted at a later date.

If you have questions about the process, ask at your campus.

Access the fundraiser request system from the Fort Bend ISD website. www.fortbendisd.com
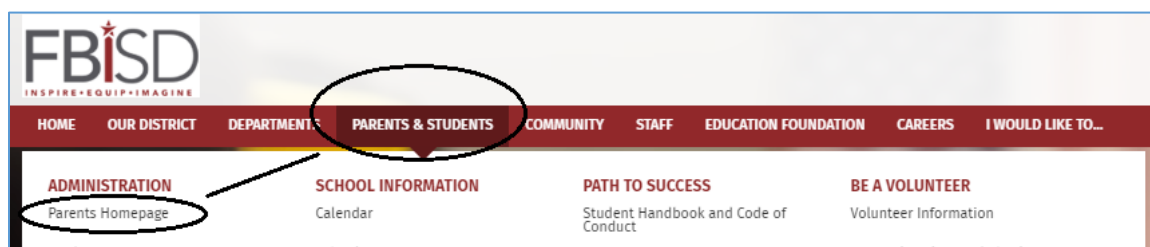
PARENT SHORTCUTS

- 2018-19 School Calendar
- 2018-19 School Supply Lists
- Accountability Ratings
- Attendance Zones
- Back-to-School
- Bus Routes
- Course Selection Guides
- Criminal Background Check
- Ethics Reporting/Lighthouse
- Extended Learning (After-school care)
- **Fundraiser Request Form**
- Graduation and Career Planning
- Graduation Information - Class of 2018
- Immunization Requirements

Choose this from the Parent Shortcut list

IMPORTANT LINKS

- Fundraiser Request Instructions
- Parent Organization Fundraisers Request (Log in)
- Fort Bend ISD Employee Fundraiser Request (Log In)

Register if you don't have an account.

Set up a user name, provide your name and contact information, and choose a password. Then "Create User"

Login, if you have an account:

User Name*

Enter user name

Password*

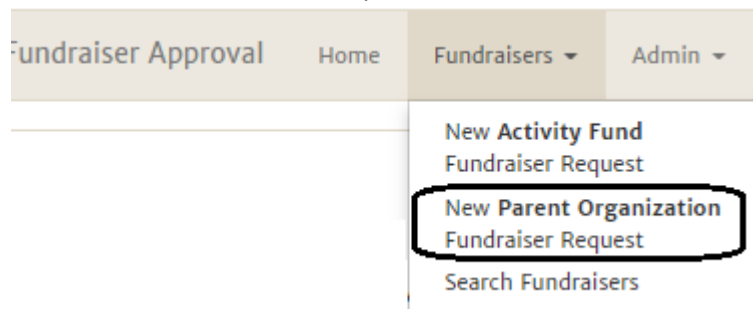Enter password

☐ Keep me logged in

Log In

Forgot Password

Read more, if you want:

How does the approval process work?

To start a new fundraiser request, choose the "New" that applies to your group

To go to an existing fundraiser request to finish it, to review it, or to do a post-fundraiser Financial Recap, choose "Search"

Fundraiser Approval   Home   Fundraisers ▾   Admin ▾

New **Activity Fund** Fundraiser Request

New **Parent Organization** Fundraiser Request

Search Fundraisers

Complete your Fundraiser Request

Parent Organization Fundraiser

Fundraiser ID will be assigned when the request is saved.
Notice the Status and Approval Progress Flow line.

Tell us about you and your proposed fundraiser:
- Select your campus
- Choose your organization if it is listed. If it's not listed, choose "Other" and type it in.
- Give a name to your fundraiser. Please be specific and descriptive
- Proposed dates. Be as exact as possible to avoid scheduling conflicts and so your bookkeeper can know about when to expect to begin seeing money. But sometimes a general range is ok. Ask your campus.
- Proposed location. On-campus, off-campus? In the cafeteria? Library? Parking lot or ball fields? This is very important, especially if food will be sold, served or distributed, and also for facility use considerations.
- Estimated profit. Give a range. You are not expected to be exact. But please do tell us your idea.
- Proposed use of funds. Tell us why you need to raise this money.
- Provide a detailed description.   Please be descriptive. If sales, include the selling price and the cost to purchase. If a commission sale, state what the expected return rate is. If it entails multiple components (ticket sales, apparel sales and concession), explain that. If 100% of the proceeds will be sent to a certain charity, state that fact.
- Upload documents which will explain your fundraiser and its details. Include a flier or budget plan. Anything that makes your case for the good idea.
- Has this organization conducted this fundraiser before? (If Yes, what was the profit?)
- Will food be sold, served or distributed on campus? This is critically important because if the answer is Yes, you will need to explain the details to the Child Nutrition Dept. and get their consent.
- Are you selling items normally subject to sales tax? (This is to prompt you to be aware of sales tax rules and to help you be sure to set your price appropriately.)
- Will this be a one-day, tax-free sale? A few organizations may be eligible for this (most are not). Consult your bookkeeper.
- Rental of District facilities required? This is a prompt for you to take those steps if necessary.
- Please give us the name and contact information of one or two people who can be contacted if there are questions.

The Status will change to "Awaiting Principal Approval"

Once submitted, you will not be able to make edits. However, if you need to make changes, ask your principal to change the status back to "Not Submitted" so you can continue working.

Notice the Status and Approval Progress Flow line. Fundraiser ID number has been assigned. Use this for future tracking and editing.

There is a History button that will document the dates as the request progresses along the review process

Parent Organization
(Form GE-E-2)

Status: Awaiting Principal Approval ▼   History   FundraiserID: 9856

Approval Progress
Submitted > << Awaiting Principal Approval >> Awaiting Assistant Superintendent Approval > Approved
Fundraiser is NOT APPROVED until the status is Approved
Submitted By: ▬▬▬▬▬
Email: ▬▬▬▬@sbcglobal.net
Submission Completed Date: 7/29/2018 11:57:12 PM

Parent Organization Fundraiser (continued)
Status = "Awaiting Principal Approval:" What happens next? • Auto-generated email will be sent to principal • Principal will open the fundraiser request (by clicking on link in the email). (He/she may also open the request by navigating to the website and using "Search" to see and open the request.) o If the principal approves of the fundraiser then at the top-right section of the form he/she will change the status to the next stop in the forward progression and click save. The choice will be "Awaiting Assistant Supt. Approval" or "Awaiting Nutrition Approval" if the fundraiser has food being sold, served or distributed on school property. o If the principal does not approve the fundraiser as submitted but wants the requester to make changes to it, then he/she will change the status to "Not Submitted" and click Save. o If the principal chooses to completely disallow it, he/she will change the status to "Denied" and click Save. A denied fundraiser cannot be revived and a new request must be initiated. So in many cases the previous option is preferred if changes can be made.
Status = "Not Submitted:" What happens next? • If the principal has sent the request back down to the submitter (status = "Not Submitted), the submitter should make any changes or additions. This might include changing the dates, any elaborating on descriptions, adding or modifying attachments, or correcting any radio button selections. It could also require the food-related information. • When ready to move on, the requester will click the "Submit for Approval" button. • If the requester wants to cancel the fundraiser request, he/she can ask the business office to delete the fundraiser request.

Parent Organization Fundraiser (continued)

Status = "Awaiting Nutrition Approval:" What happens next?

- If food will be sold, served or distributed on campus property, then it must route to the Child Nutrition department after the principal and before the assistant superintendent.
- This routing is accomplished by choosing "Yes" to the question "Will food be sold, served or distributed on campus?"
- Auto-generated email will be sent to principal Nutrition staff will open the fundraiser request (by clicking on link in the email). (Staff may also open the request by navigating to the website and using "Search" to see and open the request.)
    - o If the nutrition staff approves of the fundraiser then at the top-right section of the form he/she will change the status to the next stop in the forward progression and click save. The choice will be "Awaiting Assistant Supt. Approval."
    - o If the nutrition staff does not approve the fundraiser as submitted but wants the requester to make changes to it, then he/she will change the status to "Not Submitted" and click Save.
    - o If the nutrition staff chooses to completely disallow it, he/she will change the status to "Denied" and click Save. A denied fundraiser cannot be revived and a new request must be initiated. So in many cases the previous option is preferred if changes can be made.

Status = "Awaiting Assistant Superintendent Approval:" What happens next?

- Auto-generated email will be sent to assistant superintendent.
- Assistant superintendent will open the fundraiser request (by clicking on link in the email). (He/she may also open the request by navigating to the website and using "Search" to see and open the request.)
    - o If the assistant superintendent approves of the fundraiser then at the top-right section of the form he/she will change the status "Approved" and click save.
    - o If the assistant superintendent does not approve the fundraiser as submitted but wants the requester to make changes to it, then he/she will change the status to the next **lower** and click Save. He/she should also communicate with the staff at that stage about what should be changed. It may need to go back one or two earlier steps if necessary.
    - o If the assistant superintendent chooses to completely disallow it, he/she will change the status to "Denied" and click Save. A denied fundraiser cannot be revived and a new request must be initiated. So in many cases the previous option is preferred if changes can be made.
- If the fundraiser requested is approved, an auto-generated email will be sent to the original submitter and the bookkeeper or executive assistant at the school. The fundraiser may proceed.
- If the fundraiser requested is denied, an auto-generated email will be sent to the original submitter and the bookkeeper or executive assistant at the school.

Status = "Approved:" What happens next?

- The fundraiser may proceed.

Status = "Denied:" What happens next?

- Nothing. The fundraiser request cannot be edited or deleted. If the campus or submitter wants to resubmit a modified idea, a new fundraiser request should be started.

Continued next page….

Other Things to Know

Duplicate or Unneeded Fundraiser Requests?

If the campus staff wants to cancel the fundraiser request, he/she can ask the business office to delete the fundraiser request.

Food Sold, Served or Distributed on Campus

If you have questions about this section, please phone Child Nutrition at 281-634-1855.

Note: because of our health permit requirements, be aware that even if the food items are sold elsewhere, such as out in the neighborhood, if it is being distributed at campus we need to know about it! Typical examples are cookie dough and candy bars.

To continue or to review a fundraiser request: "Search Fundraisers."

You will be able to see the fundraiser requests that your username and permission level allow.

Be aware that there is a filter for school year, so 2017-18 and 2018-19 will be presented at different searches. You may also filter on a username.

Campus administrative staff will make good use of filtering for various approval statuses.

From this screen you can see the current status of the request, and you can click on the Item number at the left to view it and make changes (and then Submit) if you are allowed to do that.

Tools for Staying Abreast of Things

Watch out for duplicate fundraiser requests
Duplicate fundraisers will accumulate. As you detect them, notify the activity fund staff in the business office so the unneeded ones can be deleted.

Duplicate fundraiser requests that have status of Approved or Denied cannot be deleted.

What to do with changes in plans.
- If the changes are material (adding food to the plan, making a significant change in date, revamping the event to have a different character or method):
- If the fundraiser has not yet been approved, it is possible for the item to be moved back downward to the campus to make those changes and then move it back along the approval route.
- If a fundraiser has been approved but the plan has a material change, you may need to re-submit, and also do a financial recap on the approved one.
- Don't worry about small changes in plans. Slight date changes (less than 3months), minor changes such as adding a new product to sell, etc. Ok to let it go.