

Fundraising Request Form (online)

Step 1 Login

Access the request form as follows:

1. <http://secure.fortbendisd.com/fundraisers>


A link ("How does the approval process work?") is available that will summarize the approval process

2. Log in to the appropriate section:
Non-employees use top login link
FBISD employees use bottom login link

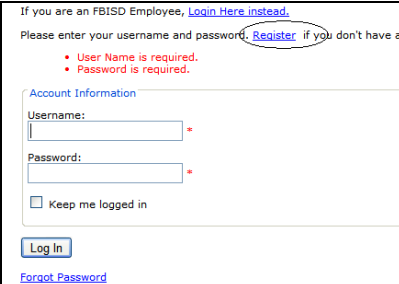

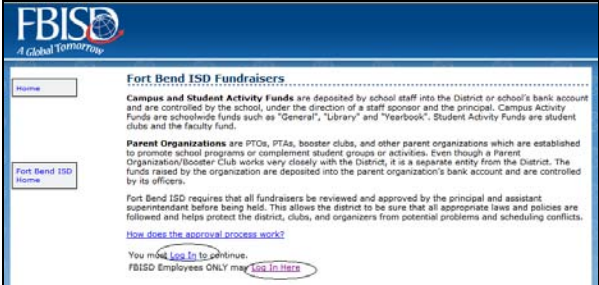
Employee login screen:
Log in using your network user name and password

Parent Org. Representative (non-employee) login screen:

First time users will register to get username and password

Employees will find a link at the Employee/Staff Information page at the FBISD website. 

Parent organization reps will go directly to the URL instead of through the District website.



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Step 2 Start a New Fundraiser Request (or Edit/Continue one)

1. Start a new fundraiser request. Note, you will be able to later view or edit fundraisers from this screen as well.

Employee screen:

Parent organization screen:

2. Event number will be assigned when saved. This will be used to call it up later during the approval process and after.

Status of Approval Progress will show as green – from “Not Submitted” through “Approved.”

Fill in all sections. Information still needed will be listed in red toward the top.

Line-by-line help on next page.

3. Save for Later if you need more information or additional staff review before submitting to the principal.

Submit for Approval, and the principal and bookkeeper/executive secretary will receive an email alert.

4. Submitted fundraiser request shows this at the top. (No longer editable by the submitter.)

Employees:

Parent Organizations:

Once submitted, you will be unable to edit the request.

Save for Later Submit for Approval

Submitted > << Awaiting Principal Approval >> Awaiting Assistant Superintendent Approval > Approved
Fundraiser is NOT APPROVED until the status is Approved

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Select the organization's name (drop-down)	Activity fund accounts are all listed. Contact Business/Finance if your account is not listed. Parent organizations must choose their campus from the long dropdown of all campuses. Then choose PTO or Other. If other, such as FFA Booster, Pro-Grad, etc, type the name.
Current account balance	Obtain this from the bookkeeper/executive secretary. Note: this does not apply to Parent Organization fundraiser requests.
Fundraiser name; Proposed dates	User-defined; use calendar to register dates.
Save for Later	Save periodically. An Event number will be assigned. You can tell this number to a campus administrator or bookkeeper/secretary so he/she can view your proposed fundraiser and comment. (Only you may make edits.)
Proposed location	
Estimated profit	Your best estimate (may be a range)
Proposed use of funds	
Provide a detailed description of the proposed activity.	For example, include examples of per-unit pricing and cost, or describe your idea as best you can.
Upload supporting documents	You may attach a budget, flier/brochure, and any information or forms that would be useful to the approval process
Has this organization conducted this fundraiser before?	Informational. Include approximate profit.
Save for Later	Any time is a good time to save.
Will food be sold, served or distributed on campus?	If so, you must fill out Child Nutrition's form (available at the link). This includes sale of boxed candy, cookie dough, etc. as part of a catalog sale even if the sales take place off campus but the items are delivered to campus later for distribution. Download from the link, print, fill out completely, then scan and attach at the link above. This is not an online fillable form.
Sales tax?	Tell us if you are selling items that are generally taxable when sold, and if you will be using a one-day tax-free sale. Information is available at the link; see bookkeeper for more info about sales tax.
Rental of District facilities?	A form is provided in case you need to take this into consideration. No need to attach the form, but get it approved separately on your own if needed.
Save for Later or Submit for Approval	Once submitted, your principal will be able to review, approve, change status to "not submitted," (for further work) or deny.

What's next? And Other Suggestions

Submitter will receive email notification... any time the request moves to a new approval stage.	
Bookkeeper/ExecSec will receive email notification... any time a request is submitted to the principal; is approved by the assistant superintendent; or denied by anyone.	
Bookkeeper/ExecSec or sponsor are encouraged to notify an additional administrator who may have input in the approval process at any point before the request is submitted or while at the Submitted for Principal Approval level.	
Comments (from any approver to a submitter) may be typed in as a communication technique. These comments are designed to be temporary and then deleted by the person who is viewing them.	
Edit/Continue Fundraiser Request	Anyone may click this to pull up a fundraiser request, but you may only make changes if the status is at your level (submitter, principal, Child Nutrition Dept., assistant superintendent). Any fundraiser (proposed or approved) can be looked up, viewed and printed at any time.

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Step 3 Principal/Child Nutrition/Assistant Superintendent Review and Approval

- Sequence of Approval is: 1) Principal, 2) Child Nutrition (if food is sold, served or distributed), then 3) Assistant Superintendent.

Approver will log in to the program and select the fundraiser from the list of all fundraisers that are at various stages of approval.

- Each approver will review the fundraiser. Then choose the appropriate new status from the drop-down and click **Save**. To send it back to the person at the previous level to make changes, choose that (lower-level) status and click **Save**.
- All changes in status will trigger an email to the original submitter and the person who is next in line for review.

Examples at each state are shown at the right.

Each time the proposed fundraiser moves to another stop, the original submitter and the person at the next stop in the approval route will receive an email notification.

When a proposed fundraiser is Approved (or Denied), an email will be sent to the original submitter and the bookkeeper/executive secretary.

Example of an Approved request is shown at the right.

Examples of requests Awaiting Principal Approval:

With food:

Example of request Awaiting Nutrition Approval:

(CND also chooses a type of permit or indicates permit "not required")

Example of request Awaiting Assistant Supt. Approval:

Example of an Approved request

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Advice:

1. Be suitably descriptive for all open-ended questions (proposed location, estimated profit, proposed use of funds, detailed description of event). Approvers may request more detailed information, which you will later edit in.
2. Attach any documents that will help describe your event, support your information, or which may be required by an approver. A financial plan or budget may be requested if an approver would like to see that.
3. When a user Submits, the request becomes uneditable by anyone other than the next person in the approval chain. If changes are needed, the approver may set the status down to a previous (lower) status or make those changes and move the request forward.
4. A submitter may contact the person who has the request at his/her level and ask that he/she change the status back to a level where the submitter may make changes.
5. If your campus relies on the bookkeeper or an assistant principal to pre-screen fundraisers for the principal, we suggest:
 - a. Tell sponsors to fill out and "Save for Later," but do not "Submit." The submitter will tell the additional reviewer the event number, and he/she can log in, review, print and comment; or
 - b. Have the principal hold off taking action on Submitted fundraisers until the additional reviewer can review, print and comment. If edits are needed, the principal will change the status back to "Not Submitted."
6. Bookkeeper/ExecSec or sponsor are encouraged to notify an additional administrator who may have input in the approval process at any point before the request is submitted or while it is at the Submitted for Principal Approval level.

Frequently-Asked Questions:

What if my organization's name does not appear in a drop-down? Stop, and contact Ron Vlaskamp or Mary Ashcraft to have an organization name added. After you hear back, you will be able to log in and do your work.

I need more information. Can I save my application? You may "Save for Later" (button at the bottom) as often as you want without leaving the screen.

Can I use rounded or estimated figures? Yes, although any approver may request more precise information.

How do I know the status of a fundraiser request? Whenever someone down the line of approvals changes the status of a proposal, the originator will receive an email notification. This includes when a fundraiser receives its final approval from the assistant superintendent or whenever the request is denied by any approver.

How can I view all fundraisers for my campus? Any fundraiser (saved but not submitted, awaiting approval, approved, or denied) can be looked up, viewed and printed at any time by using the "Edit/Continue Fundraiser" link. If desired, all data can be exported to Excel.

Documentation Type: eLearning User's Guide 5

Created by: Ron Vlaskamp

Last Modified on: 9/12/2013

Fort Bend ISD

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Can I make changes to a fundraiser that has been denied? No, but you could initiate a new request.

Can an approver request changes without completely denying a request? If an approver feels a request can be modified so that it can be approved, he/she can write a note on the form and change the status down to a lower level such as "Not Submitted," or "Awaiting Principal Approval."

Can someone other than the sponsor input the requested data online for him/her? Yes. The sponsor can describe the fundraiser to someone else who will input the information for him/her. However, online the event will not list the sponsor's name as responsible. All email correspondence related to the progress of the fundraiser request will be sent to the person who is logged in when the request is first initiated.

What is the best way to help a sponsor with the online request form but still have the sponsor's name listed with the event? Have the sponsor begin the item ("Start Activity Fund Fundraiser Request") and type in as much information as he/she knows, then "Save for Later." Get the event number, look it up, then provide suggestions so the sponsor can log back in and finish up the request.

Will non-employees who create their own user id here have access to the FBISD network? No, this user ID is only for the online fundraiser application.

Can someone other than the sponsor input the request data online for PTO/PTA/Boosters? Representatives for parent organizations should do their own work online. This way they will get all communications directly and it keeps the separation of responsibilities clear.

Why is the information on my screen is grayed-out so I can't edit anything? When a user Submits, the request will become uneditable by anyone other than the next person in the approval chain. If you need to be able to go back and make edits, ask that person to change the Approval Status to the level that you are at ("Not Submitted," or "Awaiting Principal Approval").

How can school staff, assistant superintendent staff or business office staff review fundraiser requests? Staff can view any fundraiser that is in the online system. Campus staff can see any for that campus, Assistant Superintendents and staff can view for all feeder schools, and business office staff can view all fundraiser requests. They can be looked up one at a time or exported to Excel at the "Edit/Continue Fundraiser Request" screen. There are a few drop-downs to narrow the results, if desired.

Some fundraisers for this year have already been approved using the old paper forms. Must I type them into the online system? Although not mandatory, the sponsor, bookkeeper or principal's secretary may choose to type the information into the system. Explain to the principal and assistant superintendent that these fundraisers were already approved by paper and ask for expedited approval so the data is saved to the central system.

Food Fundraisers:

What fundraisers require approval of the Child Nutrition Department? Any food sold, served, kept at or distributed on campus requires CND evaluation and approval. This is to ensure compliance with rules governing what food may be served on campus during the school day; foods sold or served that compete with the school lunch program; and health permit requirements.

Does a fundraiser that sells frozen foods or boxed candy from a catalog require CND approval? Yes, "food sold, served or distributed on campus" does include fundraisers such as cookie-dough or boxed candy even if the sales or orders take place off campus if the food is delivered to campus to be distributed. This has to do with the school being responsible for "potentially hazardous food products" where edible products hit campus even if only for distribution to the students/parents who sold them and will take them home.

What are the various food permits? The CND health permit is generally used to cover the sales or event if the sale occurs in the school building or within 100 feet. However, a Temporary Health Permit is required for events that occur outside more than 100 feet from the building such as carnivals. Cooking food in barbecue pits outside the building is one example. Cooking food in barbecue pits outside the building is one example. For additional information, please contact the Child Nutrition Department at 281-634-1190.