

Portland Public Schools Foundation

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Local School Foundation 2016-17 Handbook

PPS Foundation, a division of All Hands Raised
2069 NE Hoyt St. Portland, OR 97232
phone 503.234.5404 | fax 503.234.5402
www.allhandsraised.org

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History and Overview

The Portland Public Schools Foundation (PPSF) was founded in 1994 on the heels of the Measure 5 redistribution of revenue statewide, which resulted in significant cuts to public education in Portland Public Schools (PPS). As such, PPS parents came together with the PPS School Board to form Local School Foundations (LSFs) to raise funds to support teaching and staff positions in the LSF schools, while also supporting high need schools through the establishment of the PPSF Equity Fund. The PPSF (which remains an historic and critical division of All Hands Raised) stewards the funds raised by LSFs and manages the PPS Parent Equity Fund, in accordance with PPS School Board policy.

Under the non-profit "umbrella" of All Hands Raised, **every school in the Portland Public School District has an established Local School Foundation account.** Affiliated programs operate under the umbrella of the All Hands Raised 501(c)(3) and receive a variety of direct support services crucial to the operation of the LSF. Independent LSFs operate under their own 501(c)(3) and receive a more limited set of services. Under PPS School Board policy, all LSFs, regardless of whether affiliated or independent, contribute to the PPS Parent Equity Fund. Affiliated accounts can be activated at any time by parents in a school community who decide to begin raising funds to support Full Time Equivalent teachers and staff (FTE) in their school. Currently, there are 33 active affiliated LSFs and eight independent LSFs. In 2014-15 the whole of PPS LSFs netted in excess of \$3 million, and contributed approximately \$900,000 to the PPS Parent Equity Fund.

One-hundred percent of the net parent-raised funds benefit PPS students – **All Hands Raised does not keep a single dollar of ANY of the money raised, including for operating expenses**, and neither PPS nor PPS parents are charged a fee for this work. The services provided to PPS LSFs are made possible, in part, by an ongoing generous donation from New Seasons Market, as well as other gifts to All Hands Raised designated for operating expenses.

Services Provided to Affiliated LSFs

- Administrative and operational support, including monthly donation reports;
- Steward donors through gift recognition and tax documentation;
- Manage accounting, including deposits, accounts payable, accounts receivable; process online credit card donations (both recurring and one-time), taxes and audits;
- Use of Bulk Mailing Permit and Raffle Class A License;
- Event and umbrella insurance coverage;
- Special pricing on auction software;
- Fundraising coaching, support services and trainings;
- Manage PPS Parent Equity Fund and communicate broadly the investment made by LSFs to raise student achievement in schools receiving PPS Parent Equity Fund Grants.

Services Provided to Independent LSFs

- Process online credit card donations (both recurring and one-time);
- Monthly reporting of online donations;
- Annual billing for FTE expenditures;
- Fundraising coaching, support services and trainings;
- Manage PPS Parent Equity Fund and communicate broadly the investment made by LSFs to raise student achievement in schools receiving PPS Parent Equity Fund Grants.

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2016-17 Active Local School Foundations

Affiliated PPS Local School Foundations

| | |
|--------------------------------|------------------------------|
| Abernethy Elementary School | Laurelhurst K-8 |
| Access Academy | Llewellyn Elementary School |
| Alameda Elementary School | Maplewood Elementary School |
| Atkinson Elementary School | Markham Elementary School |
| Beach Elementary School | Metropolitan Learning Center |
| Beaumont Middle School | Mt. Tabor Middle School |
| Beverly Cleary K-8 | Richmond Elementary School |
| Buckman Elementary School | Rieke Elementary School |
| Capitol Hill Elementary School | Roseway Heights K-8 |
| Chief Joseph/Ockley Green K-8 | Sabin PK-8 |
| da Vinci Arts Middle School | Sellwood Middle School |
| Franklin High School | Skyline Elementary School |
| Glencoe Elementary School | Stephenson Elementary School |
| Grant High School | Sunnyside Environmental K-8 |
| Gray Middle School | Vernon K-8 |
| Hosford Middle School | Wilson High School |
| Irvington K-8 | |

Independent PPS Local School Foundations

| | |
|------------------------------|-------------------------------|
| Ainsworth Elementary School | Forest Park Elementary School |
| Bridlemile Elementary School | Lincoln High School |
| Chapman Elementary School | West Sylvan Middle School |
| Cleveland High School | |
| Duniway Elementary School | |

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Roles and Responsibilities

Communication with PPSF Staff

The primary goal of the PPSF staff is to support your fundraising efforts. To this end, maintaining updated contact information for your LSF leadership is an essential component to your success. Please contact Rosemary Schwimmer at 503-234-5404 or rosemary@allhandsraised.org if you have any questions or need any assistance.

Communication with Principal, School Leadership and Parents

School foundations that operate successfully typically maintain a good working relationship with the principal and have a mutual understanding of clear goals and objectives for the fundraising effort. It is also important to maintain good communication with the school leaders and other school organizations such as your PTA or booster club in establishing its funding priorities. We suggest that you develop a fundraising plan that maps out the activities for the entire school year.

Formation of Committee

Most successful fundraising efforts are the result of a committee's efforts rather than the efforts of a single individual. We recommend that once you have established a committee you designate a Chair and Treasurer to provide overall leadership and coordinate with the PPS Foundation.

- **Chair** - Each school will designate one person to be the Chair of the local school foundation (LSF). The Chair should be responsible for running all committee meetings, setting the agenda and keeping committee members informed of any LSF business.
- **Treasurer** - Each school will designate one person to be the Treasurer. The Treasurer is responsible for collecting and depositing all funds received by the local school foundation, and for reconciling reports received from the PPS Foundation.

Meetings

Meetings should be publicized, open to all parents at the school and held regularly.

Goals

Revenue goals for each school should be made in collaboration with the Principal. We recommend that schools also coordinate with other school organizations such as your PTA or booster club to ensure recommendations regarding staffing and funding are consistent with parent and staff perspectives. Please note that the school principal has authority to staff as he/she sees fit for the school. Specific hiring recommendations made by the local school foundation may not be followed if fundraising goals are not met or other needs are deemed more urgent. Please avoid making promises or commitments during planning that may not be possible. The Principal has the final say over use of foundation funds.

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Policies and Procedures

Submitting Donations for Deposit

Funds may be submitted in person at the All Hands Raised/Portland Public Schools Foundation office (2069 NE Hoyt Street, Portland, 97232), or by US Mail or Courier. When funds are received in person, the deposit is reviewed by item, and verified by the front desk staff member.

Forms described below are available at www.allhandsraised.org.

Checks - must be submitted by using the Check Deposit Form.

Cash Receipts Policy

- 1. Cash (currency, coins) must be counted in the presence of two people.**
 - A Cash Counting and Deposit Form must be filled out and signed by the two people counting the currency and coins. If donor information is known for currency and coin donations, please attach the Donor Information Sheet.
 - The cash collected and the completed forms must then be turned in to the Foundation Treasurer.
- 2. Cash should be counted immediately after collection and turned over to the Foundation Treasurer without delay.** Do not take cash home to be counted later or use cash to reimburse expenses.
- 3. The Treasurer should submit cash for deposit to All Hands Raised/PPSF promptly (within 5 business days) using the appropriate AHR/PPSF form.** According to Post Office cash handling recommendations, **cash should be delivered in person to our office, not sent by mail.**
- 4. Do not co-mingle personal and Foundation funds.** Chairpersons, treasurers, and volunteers are not permitted to deposit Foundation money into their own checking or savings accounts. For example, do not deposit cash received from a Foundation event into a personal checking account and then write a check to the Foundation for the amount of cash deposited.
- 5. Do not use cash received at an event to pay an expense.** For example, don't pay a bartender using cash received on auction night. This can result in inaccurate accounting of revenues and expenses.

Credit Cards and Monthly Donations – donors can set up one time or monthly donations online on the All Hands Raised/PPSF website donation page (www.allhandsraised.org) or can call the office for assistance. All schools in PPS are listed on our drop down menu.

Matching Funds -- Donations with matching funds must be accompanied by a letter or form from the employer and the donor portion of the form must be completed by the donor. It is best to have PPS Foundation staff fill out and submit matching gift paperwork to ensure appropriate delivery of documentation, and accurate tracking of matching gifts.

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Check to Vendor Requests

Check requests are for payments directly to a vendor. An invoice must accompany the request for payment. **Check requests require approval from the local school foundation Chair and Treasurer.** The Principal may also approve, if necessary.

Reimbursement Requests

Reimbursements are for expenses incurred related to fundraising activities. **The requesting party must complete and sign** the Expense Reimbursement Form and attach the **original receipts**. The completed form should then be submitted to the LSF Treasurer and LSF Chair and/or School Principal for approval. If the request is made by the LSF Treasurer or Chair, the school principal should be the second approval on this request. **Please note that the recipient of the reimbursement may not be one of the signatures approving the request.**

Securities – Shares of Stocks, Bonds & Mutual Funds

Donors should contact the PPSF/All Hands Raised broker at the information below. Donors should also send a notification email, including address information, to Rosemary Schwimmer at rosemary@allhandsraised.org at the PPS Foundation.

Brokerage: RBC Wealth Management
Broker: Shelly McFarland
Phone: 503-833-5212 email: shelly.m.mcfarland@rbc.com
Group Donating to: All Hands Raised/Portland Public Schools Foundation
Designate Recipient School
Account: 30784754
DTC: 0235

Contracts

Affiliated local school foundations operating under the PPSF/All Hands Raised 501(c)(3) cannot legally enter into contracts. Contracts for services must be submitted to PPSF for review and signature. PPSF does not guarantee compliance with unauthorized contracts.

Insurance

If you are hosting an event you must fill out a Special Event Insurance Request Form and submit it at least 14 days prior to the event. Certain events and/or activities may require additional approvals from the Oregon Liquor Control Commission and the Department of Justice, among others, and may incur a premium to cover the event.

Bulk Mail

School foundations are welcome to use PPSF's non-profit/bulk mailing rate discount. Please contact PPSF for an authorization letter to submit to the Post Master and for details regarding the requirements for using this permit.

Raffles

The PPSF holds a Class A License with the Department of Justice which allows our affiliated Local School Foundations to hold fundraising raffles. If your Local School Foundation intends to hold a raffle, please contact Rosemary Schwimmer at rosemary@allhandsraised.org to obtain the specific guidelines and reporting requirements to be in compliance with the law.

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Serving Alcohol at Your Fundraising Event

The Oregon Liquor Control Commission governs the circumstances under which alcohol can be served at your fundraising event. If your Local School Foundation intends to serve alcohol at a fundraising event, please contact Rosemary Schwimmer at rosemary@allhandsraised.org to obtain the specific guidelines and reporting requirements to be in compliance with the law.

Reporting and Acknowledgements

Gift Acknowledgements

The PPS Foundation will acknowledge all tax deductible contributions received at our office for tax purposes. Monthly donors will receive a tax statement in January.

The acknowledgement letters will include the amount of the donation, date received, name of the school to which the donation was made and the PPS Foundation Tax ID number (93-1149789).

Monthly Reports

Local school foundation leaders and principals will receive a monthly detail report of revenue and expense activity for the previous month, and a year-to-date summary of net revenue and PPSF Equity Fund contributions. Reports go out no later than the 10th business day of the month, with the exception of the January report which will be sent no later than the 15th business day of the month.

Merchant Fees

Merchant Fees are calculated as 3% of gross revenue, subject to annual review.



Frequently Asked Questions

Why do parents raise funds through their local school foundations?

As established by PPS School Board policy, local school foundations are the only way in which school communities and parents may raise funds to pay for additional teachers and staff (FTE).

Is my local school foundation required to establish a board or committee?

No. PPSF recognizes that schools have different levels of parent interest and capacity and does not require that local school foundations establish a specific type of leadership group. However, we highly recommend that you form some kind of committee or team – no one person can fundraise alone! We also recommend that you designate a Chair and a Treasurer.

Local school foundations that operate successfully make sure that the following conditions are met:

- The local school foundation has a good working relationship with the principal and mutual understanding of clear goals and objectives for the fundraising effort.
- The foundation has good communication with the school leaders and parent community in establishing its funding goals.
- The local school foundation leaders maintain good communication with PPSF staff.
- The foundation has a simple fundraising plan which outlines the activities for the entire school year.

What is the PPS Parent Equity Fund?

PPS Board of Education policy requires that one-third of all funds raised by a local school foundation over \$10,000 be contributed to the PPS Parent Equity Fund. In the wake of Measure 5, several schools established their own non-profit foundations to raise funds to “buy back” staff. Unfortunately, not all schools have the financial capacity to raise significant funds toward hiring staff, so the potential for creating inequities across the district needed to be addressed. In 1994, the PPS Board of Education established a task force of parents and community members to look at the issue of schools raising private funds for teachers and staff.

The PPS Board of Education adopted the task force’s recommendation for the establishment of a city-wide foundation which would benefit individual schools, and that one-third of the funds raised through local school foundations be deposited into an “Equity Fund” for the purpose of providing equity between schools. The Portland Public Schools Foundation was established to support the fundraising efforts of the local school foundations and to administer the distribution of the PPS Parent Equity Fund dollars.

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How are the PPS Parent Equity Fund dollars distributed?

100% of the dollars contributed to the PPS Parent Equity Fund are redistributed to high need schools based on a data-driven formula that takes into account demographics and financial resources available to the school. PPSF does not use **ANY** parent-raised funds through local school foundations to pay for operations or staffing; those costs are paid by other fundraising activities and a generous donation from New Seasons Market through the Cans for Kids and Bag It Forward programs.

How are donations accepted?

- Online at allhandsraised.org
- By mail to 2069 NE Hoyt Street, Portland, OR 97232
- In person at 2069 NE Hoyt Street, Portland, OR 97232
- By Phone at [503-234-5404](tel:503-234-5404)

What types of contributions can be made to a Local School Foundation or the PPS Foundation?

- Cash/Check/Credit Cards
- Monthly contributions via credit card
- Securities – Shares of stocks, bonds and mutual funds
- In-kind gifts
- Wills, bequests, trusts
- Vehicle Donations
- Workplace giving donations
- Matching gifts

What reporting does the PPSF provide to Local School Foundations?

Local School Foundation leaders receive monthly reports by the 10th business day of each month showing activity for the previous month (15th business day for the report sent in January). The reports include a list of donors, the date and the amount of their contribution for the month, a detailed list of expenses for the month, and a year-to-date statement reflecting the total accumulated for the year, and any portion contributed to the PPS Parent Equity Fund.

For more information, or to inquire about establishing a Local School Foundation at your PPS School, please contact Rosemary Schwimmer at 503-234-5404 or email her at Rosemary@allhandsraised.org.