

Fundraiser/Activities Checkoff List (unofficial document)

Revised 2/10/17 TO

PRIOR APPROVAL/REQUIRED DOCUMENTS

- Budget**
 - Did you put it in your budget to have this fundraiser?
- Capacity**
 - Do you have enough capacity in this year's budget to allow you to have this fundraiser?
- Check school calendar**
 - Be sure that you will not be in conflict with another event (at least 2 months in advance, avoiding holidays and community events).
- Activities Approval Form – you must receive prior approval for your activity!**
 - Once you receive the Activities Approval Form back with a stamped approval from the ASB this activity has been approved.
 - Chaperones (6) must sign their names on the activities approval form before submitting to ASB
 - Athletic Director's signature (required)
 - General Fund – Approval from building principal
- Facilities Approval Form (i.e. weekend custodial, building site).**
 - This form is located on the Quincy School District website.
- Select a vendor**
 - Is this vendor active in our system?
 - A W9 and Request for Taxpayer Information is required to set up a vendor. These forms are located on the district drive/purchasing/vendors. Please email these forms to your vendor to start this process. Once the vendor sends these documents to the district office the TIN # is checked to make sure they provided the correct number. Once this is complete the vendor will be added to our system.
- Reseller Permit**
 - [Reseller permit – information](#) - See rules to see if your fundraiser can be tax exempt from paying Sales Tax.
 - If your fundraiser is indeed tax exempt go to the M Drive for a copy of the reseller's permit to fax to your vendor. You must fax this to the vendor then forward the copy of the reseller's permit to your building Administrative Assistant to attach to the po so Accounts Payable knows this process was completed and will not pay sales tax on the invoice to the vendor.
- Personal Services Contract**
 - This form requires various signatures including the Superintendent's signature. Please provide enough time for this form to be returned back to you for processing with the PO.
- Proof of Insurance or Hold Harmless Agreement**
 - The Proof of Insurance must list QSD as an additional insured.
 - You only need one or the other of these documents, not both.
- Requisition**
 - Once you have all the above documents approved, fill out a requisition for each vendor or consultant (i.e. DJ/Band, photographer, supplies, police officers, and decorations).
 - Each requisition is required to be itemized.

- Forward all documents to your building Administrative Assistant to attach these documents to the purchase order to be sent over to the district office for payment.

Contact police department as soon as dates confirmed.

Request cash box (High School ASB – Carol Sanchez).

TWO DAYS PRIOR TO EVENT

Two days prior to event, make a follow-up call to confirm and remind police of dance.

EQUIPMENT SET UP

Contact Tom Harris prior to vendor set up of equipment.

CLEAN UP

Deposit slip and money bag to bank night deposit.

RECEIVING ITEMS

All fundraiser items must be shipped directly to your school. You will be responsible for receiving your items in Central Receiving in Skyward.

Fundraisers – See WASBO ASB Procedures Manual & Personal Services Contract/Proof of Insurance or Hold Harmless section of this document.

Personal Services Contract/Proof of Insurance or Hold Harmless - As per Canfield Insurance and the State Auditor all service providers (i.e. dj's, inflatable toys, parent night activity providers, senior project vendors, etc.) need to fill out a [Personal Services Contract](#) and either **A)** provide a [Proof of Insurance](#) [preferred] naming QSD as an additional insured, or **B)** fill out the [Hold Harmless Agreement](#) (which is located on the district drive) signed by the vendor accepting responsibility for any risk or damages directly accountable to them.

After the Personal Services Contract is signed and one of the other options for liability purposes is signed and attached, it comes to the District Office for the Superintendent's signature. The Contract will not be signed by the superintendent without one of the attachments. The documents will then be returned to you at the building for attaching to the original purchase order then sending all documents to the District Office.

The vendor needs to be aware of the requirement up front at the time the service is contracted and the necessary forms provided to them at the time the activity is approved either by the ASB or Building Principal.

[Assemblies or fundraisers](#) with product sold do not need to have a Personal Services Contract filled out but must have Proof of Insurance or a [Hold Harmless](#) signed and sent to the District Office for the Superintendent's signature. This document will be returned to you at the building to attach to the original purchase order then sending these documents to the District office.