



CARROLL

INDEPENDENT SCHOOL DISTRICT



CARROLL DRAGONS - TRUE TO THE CORE

EXCELLENCE RELATIONSHIPS CHARACTER & INTEGRITY INNOVATION OPEN & HONEST COMMUNICATION COMPASSIONATE SERVICE



CARROLL

INDEPENDENT SCHOOL DISTRICT

2400 N. Carroll Ave., Southlake, TX 76092 817.949.8222 FAX 817.949.8228 www.southlakecarroll.edu

*Lane Ledbetter, Ed.D., Superintendent
Jill Webb Assistant Director of Marketing*

May 17, 2021

Subject: Fundraiser Permit Application

To: Prospective Companies

Thank you for your interest in fundraising for the Carroll Dragons! We appreciate your support and cooperation as we take steps to ensure better communication and overall efficiency in fundraising operations. You play a key role in the success of CISD's fundraising efforts and the procedures and processes put in place are intended to provide you with additional exposure and visibility as an official CISD fundraising company. Our goal is to better track and evaluate the most successful fundraising opportunities so that our student, parent and support organizations can maximize their revenues for CISD schools/programs.

More than a decade ago, Carroll Independent School District ("District") established a requirement that all companies interested in providing fundraiser services to the District complete a **Fundraiser Permit Application** and be approved by the District in order for the company to initiate or continue providing this service to the District. This official application process helps us better communicate about approved companies and fundraisers to our student, parent and booster support organizations. Once approved, you'll be featured on our Dragon Fundraising website for three years before having to renew.

If you are an interested fundraising company, the District invites you to submit a **Fundraiser Permit Application** to the Carroll ISD Financial Services Office, 2400 N. Carroll Ave., Southlake, Texas 76092, along with a \$50 non-refundable application fee. Those companies that follow this process will receive a three-year Dragon fundraising card and will be listed among the District's official fundraisers on the Dragon website. This equates to less than \$17 per year for the chance to be listed on the CISD website.

The \$50 processing fee will be deposited into the District's General Operating Fund to help all Dragons. Your check should be made payable to Carroll ISD. Successful applicants must also review, sign and return the Selection and Guidelines form enclosed in your application packet. Permit applications will be reviewed as they are received and prospective companies will be notified within thirty (30) days of receiving the application. For a fee of \$100, the District will expedite review of your application and make a final decision within one week after receiving the submittal.

Approval will be given to fundraising companies that have received an acceptable evaluation rating by the District. The District reserves the right to negotiate any terms, conditions, or pricing with an applicant prior to official approval of the application. The District reserves the right to reject any or all applications, to approve contracts for individual products or services as may appear advantageous, and to negotiate separately in any manner necessary to serve the best interest of the District. We appreciate all you do to raise funds for public education, and we look forward to processing your permit application soon.

Sincerely,
Jill Webb
Assistant Director of Marketing

Creating an environment that fosters excellence. . .

✓ Excellence ✓ Relationships ✓ Character & Integrity ✓ Innovation ✓ Open & Honest Communication ✓ Compassionate Service

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The following information is to provide fundraising companies with the needed step-by-step details on how to complete and submit the required permit applications. It also sets forth guidelines. Please review, sign and submit with the permit application and accompanying \$50 non-refundable application fee.

1. **DEFINITION.** For the purpose of this solicitation, a fundraiser is known as a company/firm whose purpose is to assist schools or organizations with the raising of funds by the sale of items and/or services.
2. **BACKGROUND.** To ensure the appropriateness of fundraising services supplied to the District, the District established a qualification process in selecting fundraiser companies. The process is comprised of two (2) steps: a). the District evaluates the permit applications and selects qualified applicants based on pre-established evaluation criteria and these approved applicants are then identified on a roster distributed to each campus and available online; b). each campus makes the final determination on which fundraising company is the most suitable in meeting their needs by selecting from the applicants listed on the approved roster. Obtaining approval does NOT guarantee a CISD meeting or fundraising project.
3. **FUNDRAISER PERMIT APPLICATION.** Interested fundraising companies must complete the attached Fundraiser Permit Application and submit it, along with the \$50 non-refundable application fee, to the District Financial Services Department, at the address indicated on the application, for approval prior to contacting any campus/department, CISD booster or PTO organization. Interested companies who want expedited review must pay a non-refundable fee of \$100.
4. **PROHIBITED FUNDRAISERS.** The following types of fundraisers will not be considered:
 - 4.1. **Door-to-Door Solicitations.** Pursuant to CISD Board policy, students are prohibited from doing door-to-door fundraisers.
 - 4.2. **Minimal Nutritional Value.** Products with a minimal nutritional value will not be sold in the cafeteria and servicing areas during the serving period.
 - 4.3. **Raffles.** The District shall not sponsor or conduct raffles, i.e., award one or more prizes by chance at a single occasion among a pool or group of persons who have paid or promised a thing of value for a ticket that represents a chance to win a prize.
5. **EVALUATION CRITERIA.** Each application will be evaluated on the following criteria. To be considered for approval, a Permit Application must be considered "Acceptable." The criteria are:
 - 5.1. Basic description of company and the types of products or services offered;
 - 5.2. The range of unit costs and suggested retail prices of the product or service;
 - 5.3. Anticipated profit percentage for the product or service;
 - 5.4. How the product or service is marketed;
 - 5.5. Product or service guarantee;
 - 5.6. Support services provided by the Fundraising Sales Representative;
 - 5.7. Ability to receive credit for unsold merchandise;
 - 5.8. Company's proof of adequate insurance; and
 - 5.9. Three (3) references (preferably from other area school districts).
6. **APPLICATION PROCESSING TIME.** It is anticipated that the review process may take 2 – 4 weeks. However, the process may be delayed due to an increased number of applications. Applicants may pay a non-refundable application fee of \$100 for a priority, expedited review and decision in one week.
7. **AWARD.**
 - 7.1. Awards will be made upon acceptance and review of Permit Applications.
 - 7.2. Each applicant will be contacted in writing of their approval. No contact with the campuses shall take place until receipt of approval and issuance of ID cards.
8. **REJECTION OF APPLICATION.** Applications may be rejected for any of the following reasons. Not withstanding any of the following, final approval is at the District's sole discretion.
 - 8.1. Failure to meet the acceptable requirements set forth in the criteria above;
 - 8.2. Product/service is unsuitable for marketing in the District;
 - 8.3. Insufficient profit potential;

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- 8.4. The solicitation of the product/service by the Fundraising Sales Representative creates a conflict of interest by his/her relationship with a District employee.

9. RESUBMISSION OF A REJECTED APPLICATION.

- 9.1. If a Permit Application has been rejected, the applicant company may submit a new Permit Application once the deficiency(s) has been corrected.
- 9.2. For the District to consider a new Permit Application, it must be an entirely new application, including all original documents, forms and fee.

10. OPERATING PROCEDURES

- 10.1 Upon approval and issuance of Fundraiser ID card, salesperson must show ID at individual campus and discuss project with the school Principal.
- 10.2 The fundraising salesperson must speak with the Principal prior to direct contact with staff at that school. If the salesperson first contacts a member of the staff, the company will be removed for one year from the list of approved fundraising companies.
- 10.3 The salesperson shall obtain a signed copy of the purchase order before beginning the project. The Sponsor and Principal shall complete the Carroll ISD purchase order and submit for approval. The confirming approved purchase order will be faxed and/or emailed to the company. A purchase order will not be issued while the salesperson waits in the lobby.
- 10.4 The fundraising company will review and reconcile all aspects of the fundraising project with the Sponsor and the Principal. This will include replacing broken items, picking up unsold items, etc.
- 10.5 The fundraising company is responsible for mailing an invoice, referencing the project's purchase order number, to the billing address noted below. Payment will be issued within 30 days receipt of the invoice and approval through the purchasing system. If necessary, after the project is complete, the salesperson shall issue credit for broken or unsold items returned to the Company. The fundraising company will mail a credit memo to the billing address and reference the project's purchase order number. The Carroll ISD billing address is Carroll ISD, Attn: Accounts Payable, 2400 N. Carroll Avenue, Southlake, TX 76092. If your company uses any other billing address, Carroll ISD will not be responsible for late payments, service charges, etc.
- 10.6. If the fundraising company solicits business with a PTO, booster club or other organization established for the benefit of the school district, the fundraiser must show its Fundraiser ID to the appropriate officer of the organization and comply with all policies and procedures of both the District and the organization established for the benefit of the District.
- 10.7 Each year the District will evaluate the current list of approved fundraising companies and will conduct an annual renewal of its approval for up to three years. If any complaints are lodged with the District concerning operations, accounting, procedures, etc. about your company, the District reserves the right to remove your company from the approved fundraiser list, in its sole discretion, upon written notice to the fundraising company of such removal. All fundraising companies must reapply every three years.
- 10.8 Each fundraising company accepts full responsibility for adhering to Senate Bill 9 (fingerprinting) requirements. At no time shall any fundraising employees have unsupervised contact with students.
11. We, the undersigned, have read and fully understand all the above guidelines and requirements and can guarantee compliance.

Authorized Company Representative

Company Name

Printed Name

Telephone Number

Address

Email Address

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FUNDRAISER PERMIT APPLICATION

The following information must be provided for an application to be reviewed by the Carroll ISD Accountant. Incomplete applications will be returned to the applicant. Please attach a list of references, preferably from other area school districts. Submit the completed application and \$50 nond refundable application fee to:

Carroll ISD Accountant Zoraida Estevez 2400 N. Carroll Ave., Southlake, TX 76092

Firm Name:

Address:

City:

State:

Zip:

Fundraising Sales Representative:

Title:

Phone #:

Toll Free #:

Cell #:

Fax #:

Email Address:

Company Web Site:

The following information shall provide the District a basic understanding of the product or service being offered. All information must be completed for the application to be considered.

1. Basic description of company and the types of products or services offered (attach copies of product descriptions, promotional literature, sales instructions, etc.):

2. The range of unit costs and suggested retail prices of the product or service:

3. Anticipated profit percentage for the product or service (preferred profit percentage is 40%):

4. How is the product or service marketed:

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FUNDRAISER PERMIT APPLICATION (continued)

5. Product or service guarantee (including evidence of liability insurance):

6. Support services provided by the fundraising sales representative above:

7. Can unsold merchandise be returned to the company and credit issued?

☐ Yes ☐ No

8. If yes, will it be for full credit?

☐ Yes ☐ No

9. If no, what percentage will be credited?

%

10. List the appropriate school level(s) for the product or service.

All Grade Levels

High School (9-10)

Middle School (7-8)

Intermediate School
(5-6)

Elementary
School (PreK-4)

I, as a representative of the company listed above, have reviewed and understand the requirements for the Fundraiser Permit Application listed above and the application terms and conditions, and will conduct my business with the District in accordance with the requirements as stated.

Signature:

Date:

For CISD Use Only

This application has been:

Received Date: _____

Rec'd Initials: _____

Approved: ☐

Disapproved: ☐

Reviewed by: _____

Action Date: _____

Reasons for Disapproval:

☐ Product/service is unsuitable for marketing at CISD.

☐ Unacceptable marketing requirements.

☐ Unit costs not appropriate for District fundraiser.

☐ Unacceptable product or service guarantee.

☐ Insufficient profit potential.

☐ Other: _____

☐ Poor references.

Carroll ISD Accountant

Date