



FUND RAISER PROPOSAL AND COST EVALUATION

This form should be used for evaluating Sale-of-Product or Sale-of-Service Fund Raisers as identified in Administrative Rule JJE (Fund Raising Activities).

This Form does not need to be completed for the following list of fundraisers as identified in Administrative Rule JJE (Fund Raising Activities):

- Yearbook
- Book fairs
- Purchasing cards/commitment cards
- Recycling activities
- Newspaper
- School pictures
- School store
- Vending operations
- Homecoming dance
- Prom
- Athletic ticket sales
- Athletic concessions sales
- Drama productions

This Form should be completed by the school sponsor or school support organization.

Rule JJE also establishes the following fund raising criteria:

- Prior to approving a fund raiser, Form JJE-1 (Fund Raiser Proposal and Cost Evaluation) should be completed and maintained with the school’s financial records;
- Fund raisers must have a designated purpose clearly communicated in the dissemination of information to students, parents, guardians, and school community;
- All fund raising activities must comply with state law;
- All fund raising activities must comply with Financial Services guidelines and procedures and Administrative Rule JJE;
- Fund raisers should benefit instructional programs, clubs, and student recognition;
- The principal is responsible for assuring the prior approval of all fund raising activities, regardless of sponsor;
- Schools are prohibited from conducting door-to-door fund raising by students;
- Fund raising activities, regardless of sponsor, may not involve any student during instructional time; Students may participate in the collection or accounting for monies received for fund raising purposes in compliance with Rule JJE, Section A.2.c.(3);

School: _____ Group/staff member in charge of fund raiser: _____

1. Describe the fund raiser activity and its purpose:

2. How is the fund raiser related to the instructional program, class or club, or student recognition?

3. Fund raiser product or service: _____

How will fund raising information be disseminated to students/parents/guardians?

Method of collecting fund raiser funds: _____

Dates of collections: _____

4. Are these dates in conflict with any other fund raiser at the same time in the school? Yes ____ No ____

If yes, what are the other fund raisers? _____

5. Evaluate the profitability of this fund raiser. Projected net profits (profit percentage) should be calculated by estimating revenue, expenses and staff time allocated to the fund raiser project. If the school is sponsoring the fund raiser, Administrative [Rule JJE](#) encourages principals to negotiate a forty percent or greater return but requires no less than:

- Twenty-five per cent on total proceeds of the sale of a product; or
- Twenty per cent on total proceeds of the sale of a service.

Example of Profit Percentage: _____

Estimated Revenue	\$10,000
Estimated Expenses	(6,500)
Net Profit	\$ 3,500 *

Profit Percentage 35%

Calculation: $\$3,500 / \$10,000 = 35\%$

Net Profit / Estimated Revenue = Profit Percentage

***Plus estimated staff time allocated to fund raiser**

→ **Calculate Anticipated Profit Percentage of Fund Raiser**

Anticipated Profit Percentage:

Revenue	\$ _____
Expenses	(_____)
Net Profit	\$ _____ *

Profit Percentage: ____%

Calculation: $\$ \text{_____} / \text{_____} = \text{Profit Percentage}$

Net Profit / Revenue

***Plus estimated staff time allocated to fund raiser**

↓
Complete at Conclusion of Fund Raiser

Actual Profit Percentage:

Revenue	\$ _____
Expenses	(_____)
Net Profit	\$ _____ *

***Plus staff time allocated to fund raiser**

Profit Percentage ____%

Calculation: $\$ \text{_____} / \text{_____} = \text{Profit Percentage}$
Net Profit / Revenue

6. Have details of the fund raiser been discussed with the school bookkeeper? Yes ____ No ____

7. Is the fund raiser in compliance with the Cobb County School District Administrative Rules JJE and KH? (Rules can be located at www.cobbk12.org) Yes ____ No ____

8. At conclusion of fund raiser, complete the profit percentage earned in Step #5. This report should be completed and maintained with the school's financial records for audit purposes.

Evaluator/Principal Comments:

FUND RAISER PROPOSAL AND COST EVALUATION

Evaluator's Name/Position Title _____

Date _____

Evaluator's Signature

FUND RAISER APPROVAL

Date _____

Principal's Signature
(Signature stamps not allowed)

1/13/10