STANWOOD–CAMANO

MUSIC BOOSTER POLICY FRAMEWORK

Standard Operating Procedures for District-Wide Fundraising, Fund Allocation, and Inter-School Coordination

Stanwood–Camano Music Boosters

A 501(c)(3) Nonprofit Organization

Supporting the music programs of Stanwood–Camano School District No. 401

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1. Purpose and Scope

Stanwood–Camano Music Boosters (the "Organization") is a district-wide music booster club organized as a 501(c)(3) nonprofit to support the instrumental, vocal, and general music programs across the schools of Stanwood–Camano School District. This Framework establishes the standard operating procedures that govern how the Organization raises funds, how those funds are pooled & allocated among schools, and how the schools and the central board coordinate with one another.

1.1. Objectives

- Provide equitable, transparent, and predictable financial support to music programs at all levels.
- Give each school music program access to funds which abide by Stanwood-Camano Booster guidelines.
- Prevent duplicated effort, calendar conflicts, and disputes between schools over who may raise and claim funds.
- Safeguard the Organization's charitable status and reputation through sound financial controls and clear rules.

1.2. Relationship to District Policy

The Organization is an independent nonprofit and is *not* a part of the school district. Because it operates in support of district music programs and works with students and staff, this Framework is designed to comply with the following Stanwood–Camano School District Board Policies. Where any provision here conflicts with district policy or state law, district policy and law control.

District Policy	Relevance to the Organization
4120 — School Support Organizations	Governs recognition of booster/support groups; the Organization should obtain and maintain district recognition under this policy.
3530 — Fundraising Activities Involving Students	Sets conditions on student participation in fundraising; all fundraisers must conform.
3510 — Associated Student Bodies (ASB)	Booster funds must be kept separate from each school's ASB account; the two may not be commingled.
1610 / 5251 — Conflicts of Interest	Informs the personal and vendor conflict standard in §11.
4260 — Use of School Facilities	Applies whenever the Organization uses school buildings or grounds for events.

2. Quick Reference

Read this page first. It is the plain-language version of the rules that matter most day to day. The full detail, and the tie-breakers, live in the sections referenced in brackets.

MONEY THAT IS YOURS — no competition, low friction

- Your **Individual School Share allocations are yours** to spend on your program. [§7]
- Funds ***your school*** raises stay with your school: **80% — after the 15% general share and the 5% emergency share**. [§6]
- Grants you win go **100% to your school** — no general share or emergency share is taken. [§6.2]
- Money matched by funding sources is allocated **100% to your school**.

MONEY YOU COMPETE FOR — the Need pool only

- The Need pool is built only from multi-school and district-wide fundraisers, and awarded district-wide at the Board's discretion. Submit a Request for Funds; the Board decides by the Fairness Rule. [§9]
- The 15% General Fund (overhead) and 5% Emergency Fund are not distributed to schools and are not competed for.

BEFORE YOU FUNDRAISE

- Submit a **Request for Fundraiser** first and get it on the district-wide calendar. [§8]
- Once approved, that fundraiser's proceeds are **yours**. No other school may claim them. [§11.1]
- Run an event without approval and the Board may direct where the money goes.

BEFORE YOU SPEND

- Up to **$250**: Treasurer + one officer. **$250–$2,000**: Board majority. Over **$2,000**: Board vote at a meeting. [§9.2]
- True emergency? You may commit up to **$500** now and file the RFF after — within **5 days**. Misuse can cost your school the privilege. [§9.5]
- Keep receipts — **no receipt, no reimbursement.**

THE GOLDEN RULES

- One school's fundraiser proceeds belong to **that school**. Never claim another school's money. [§11]
- Never mix booster money with ASB money. [§10]
- Disclose any personal or vendor conflict and step back from the decision. [§11.3]
- Advocate hard for your school — but the **formula and the process** decide, not volume.

3. Definitions

Term	Meaning
Board	The central Board of Directors of the Organization, as described in §4.
School Liaison	A designated, non-voting representative for a single school who brings that school's needs and fundraising plans to the Board.
Program	A distinct music offering at a school (e.g., band, choir, orchestra, general music). A single school may contain multiple Programs.
General Fund	15% of every fundraiser's proceeds, held centrally to cover the Organization's operating overhead. Board-controlled; not distributed to individual schools.
Individual School Fund	The money a single school controls: for its own fundraisers, the full 80% (Base + Enrollment + Need); plus any grants and restricted gifts. Spent through the Request for Funds process (§9)
Emergency Fund	A board-held district reserve, funded by a 5% share of fundraisers (capped at $20,000), used as an overdraft backstop to cover a school's urgent cost overruns only when that school's own funds are exhausted — not a school's to spend at will.
Need Pool	The Need shares (30% of the 80%, §7) from multi-school and district-wide fundraisers, held centrally and awarded competitively at the Board's discretion through the Request for Funds process (§9). A single-school fundraiser's Need stays in that school's Individual School Fund.
Request for Fundraiser (RFR)	The application a school submits to obtain approval and a calendar reservation for a fundraising activity before promoting it (§8).
Request for Funds (RFF)	The standardized form used to spend funds — routine from a school's own money, or competitive from the Need pool (§9).
Fiscal Year	The Organization's accounting year, running **July 1st** through **June 30th**.
Conflict of Interest	A situation where a Board member's or Liaison's personal, family, or financial interest could improperly influence — or appear to influence — an Organization decision. The conflicted person discloses it and recuses from the decision (§11).
Suspending	A Board action, by majority vote, that temporarily withdraws a school's emergency (and, where warranted, other delegated) spending authority after misuse, until the Board restores it (§9.5).
Base / Enrollment	The two portions of the 80% that go directly to the raising school(s): **Base,** a flat per-program floor; **Enrollment,** by student participation (§7).

4. Organizational Structure and Governance

The Organization uses a small central Board supported by one non-voting Liaison from each participating school. A small Board can decide quickly, and every school still has a direct voice through its Liaison.

4.1. The Board of Directors

The Board is the sole decision-making body and holds all voting authority. Recommended composition:

Officer	Core Responsibilities	Votes?
President	Leads the Board, sets agendas, represents the Organization to the district, and sees that the Framework is followed.	Yes
Vice President	Owns the district-wide fundraising calendar and de-conflicts fundraiser requests; acts for the President when absent.	Yes
Treasurer	Custodian of all funds; maintains books, runs allocations, splits fundraiser proceeds, files taxes, reports (Section 10).	Yes
Secretary	Keeps minutes and records; logs RFRs, RFFs, and COI disclosures.	Yes
Members-at-Large (up to [3])	Provide balance across school levels and geography so elementary, middle, and high schools are all represented.	Yes

4.2. Terms, elections, and quorum

- Officers serve **one-year** terms, elected by the voting membership at the annual meeting. Stagger Member-at-Large terms for continuity.
- Can serve no more than two consecutive terms in the same office with a total of no more than five cumulative years. They may be re-elected to office after two years of not holding a position on the board.
- A quorum is **a majority of seated Board members**; ordinary decisions pass by simple majority. Allocation decisions and amendments require **a two-thirds vote**.
- No two officers holding financial-control roles (i.e. President & Treasurer) should be members of the same household.

4.3. School Liaisons

Each participating school designates one School Liaison, who is the main point of contact between the school and the Board. Liaisons attend Board meetings and speak for their school but do not vote — this keeps the Board small enough to act while giving every school a say.

- Single point of contact between the school's music staff, its parent volunteers, and the Board.
- Submits the school's Requests for Fundraiser and Requests for Funds; reports results back to the school.
- Certifies the enrollment and participation figures the allocation formula depends on (§7).
- Raises scheduling conflicts early so the district-wide calendar stays clean.
- School liaison must be approved by that school's music teacher.
- School liaison must have a student enrolled (past or present) in that school.
- All parents are welcome to participate but only school liaisons will be heard as the representative of that school.

4.4. Decision Rights at a Glance

Decision	Proposes	Decides
Annual budget review	Treasurer + Liaisons	Board vote
Request for Fundraiser (calendar + claim)	School Liaison	VP / Board
Spend from own school funds	Liaison / Music Program Director	Treasurer + one officer
Need-pool Request for Funds	Program / Liaison	Board vote
Emergency use up to $500	Liaison / Music Program Director	Commit now; post-auth RFF + Board review
Suspend a school's emergency spending authority	Any Board member	Board majority vote
Amendment to this Framework	Any Board member	Two-thirds Board vote

5. Participating Schools

The Organization supports music programs across Stanwood–Camano School District No. 401. This section identifies the schools currently participating, how a school joins or leaves, and how each school is represented.

5.1. Actively Participating Schools

A school is *actively participating* when it has a music program and a seated Liaison (§4.2). Each active school holds one Liaison seat and shares in the allocation formula (§7). The schools currently active are:

Level	Schools
Elementary	Cedarhome · Elger Bay · Stanwood · Twin City · Utsalady
Middle	Port Susan Middle · Stanwood Middle
High	Stanwood High · Lincoln Hill High
Additional programs	Saratoga School · Lincoln Academy

The current roster — each school's Liaison, with contact details — is maintained in **Appendix E** and confirmed at the start of every school year.

5.2. Adding and Dropping Schools

Adding a school. Any school in the District with a music program may join. The Board seats a new school by majority vote once the school has (1) an active music program, (2) a Liaison approved under §4.2, and (3) current district recognition (Policy 4120). A newly seated school begins receiving **Base and Enrollment** allocations at the start of the next Fiscal Year, so mid-year additions do not disturb splits already in progress; its Liaison may attend and speak immediately.

Dropping a school. A school may leave at its own request, or the Board may treat a school as *inactive* if it has had no music program or no seated Liaison for a full Fiscal Year. Any change is decided by the Board, recorded in the minutes, and reflected in the roster (Appendix E).

> **What happens to a departing school's money.** A departing school's Individual School Fund balance is held for **one Fiscal Year** in case the school returns. If it has not resumed participation by then, the Board directs the remaining balance to district-wide music purposes by vote. Grants and restricted gifts follow their original terms; the General Fund and Emergency Fund are unaffected.

5.3. The Liaison Seat and Parent Participation

One seat per school. Each actively participating school holds exactly **one Liaison seat** — the school's single, official voice to the Board. The Liaison is non-voting but carries the school's needs, submits its Requests for Fundraiser and Requests for Funds, and certifies the participation counts the allocation formula depends on. (§4.2 sets the Liaison's qualifications and duties.)

Parents are welcome — the Liaison speaks for the school. Every parent is encouraged to volunteer, attend meetings, and bring ideas forward. To keep the Board small enough to act while giving each school a clear voice, only the seated Liaison is recognized as the school's representative in Board decisions; parents raise input through their school's Liaison.

Vacancies. If a Liaison seat is vacant, the school's music teacher (or the Board) may name an interim contact so the school keeps its voice. A school with no seated Liaison for a full Fiscal Year may be treated as inactive under §5.2.

6. Fund Structure

The Organization uses a hybrid model with three buckets. Most of the funds a school touches is money it controls directly. Every fundraiser's proceeds are divided the same way. The 80% follows the school(s) that raised it (divided by §7); the 15% and 5% are held centrally by the Board.

6.1. The Three Buckets

Bucket	Fed by	Controlled by
Individual School Fund - 80%	The 80% belongs to the school(s) that raised it, divided by §7. Base + Enrollment always goes to the raising school(s). Need goes to the school too on a single-school event; on a shared or district-wide event, Need is awarded at discretion of the board.	The School Music Program
General Fund - 15%	Covers the Organization's operating overhead — insurance, registrations and filings, bank and payment-processing fees, software, supplies, and administration. Unrestricted gifts are Board-directed.	Board
Emergency Fund - 5%	A district-wide overdraft backstop for a school's urgent cost overruns when its own funds are exhausted. Capped at $20,000; once capped, the 5% reverts to the General Fund.	Board

> **Setting the split.** The **80 / 15 / 5** split is the single most important set of numbers in this Framework: 80% follows the school(s) that raised it (divided by §7), 15% funds Organization overhead, 5% is the emergency backstop. Change these only by Board vote, effective at the start of a Fiscal Year — never mid-year.

6.2. Grants

A grant is money the Organization applies for from an outside funder — a foundation, business, civic group, or public program — on behalf of a school or Program.

Board approval before filing. Grants require Board approval before they are filed. Because a grant commits the Organization to the funder's terms, deadlines, and reporting, no application is submitted on the Organization's behalf until the Board has approved it. The requesting Liaison submits a **Grant Request (Appendix F)** with the funder, purpose, amount, the named school or Program, deadline, and any match or reporting obligations.

Where the money goes. A grant applied for on behalf of a specific school or Program goes **100% to that school's Individual School Fund**. No 80 / 15 / 5 split is taken, and no other school has any claim to it. Only a grant genuinely written for the Organization as a whole is Board-directed.

Tracking, restrictions, and reporting. Once a grant is awarded, the Treasurer records it to the named school's Individual School Fund and tracks it separately. The requesting Liaison and the Treasurer together see that the funder's restrictions, spending timeline, and any reporting or follow-up are met. Grant applications and award letters are retained per §12.

> **Grants take no split.** The 80 / 15 / 5 split (§6.1) does not apply to grants — 100% goes to the named school's Individual School Fund.

6.3. Restricted and Unrestricted Gifts

A gift is a donation the Organization receives without applying for it — unlike a grant, which is applied for and carries the funder's terms (§6.2). How a gift is handled depends on whether the donor placed a restriction on it.

Type	What it is	Where it goes
Restricted gift	The donor names a specific school, Program, or purpose.	100% to the named school's Individual School Fund (or held for the stated purpose). No 80 / 15 / 5 split is taken — treated like a grant.
Unrestricted gift	Given with no strings attached.	Board-directed — typically to the General Fund, or wherever the Board votes it best serves the mission.

- **Get it in writing.** Record any restriction (school, Program, or purpose) in writing, and the Treasurer tracks the gift so restricted funds are never spent on anything else.
- **Honor it or return it.** If a restriction can no longer be met — the Program has ended, or the use is ineligible (§9.1) — the Board goes back to the donor to redirect the gift, or declines or returns it. Restricted gifts are never quietly repurposed.
- **Acknowledge every gift.** The Treasurer sends a written acknowledgement so donors can substantiate a charitable deduction; confirm the current IRS receipt requirements for the gift amount.
- **In-kind gifts.** Donated goods (instruments, equipment, supplies) are recorded at fair value; if restricted to a school, they are added to that school's Individual School Fund records.

> **Gift vs. grant.** A gift arrives with no application or reporting; a grant is applied for and carries the funder's deadlines and reporting (§6.2). Both, when tied to a school, go 100% to that school's Individual School Fund.

7. School Funding Allocation Model — Dividing the 80% School Share

Every fundraiser's proceeds are first split 80 / 15 / 5 — 80% to the school or schools that raised it, 15% to the General Fund (overhead), and 5% to the Emergency Fund. This section governs only the 80% school share, dividing it three ways. The three parts are shares of that 80% and always sum to it.

§7 divides the 80% only. The 15% General Fund and 5% Emergency Fund are taken first and never enter this formula.

7.1. The Formula

80% School Share = Base + Enrollment + Need

Part	How it works	Share of the 80%
Base	A flat, equal amount to every participating program — a guaranteed floor so no program is left without support. On a shared fundraiser, Base is split equally among the participating programs.	**30%**
Enrollment	Divided by the number of students who actively participate. On a shared or district-wide event, this splits the proceeds among participating schools in proportion to the students each turns out, as certified by each Liaison.	**40%**
Need	On a **single-school** fundraiser, the Need portion goes into that school's Individual School Fund with the rest — it is the school's money, spent through the RFF process (§9). On a **multi-school or district-wide** fundraiser, this portion is awarded at the Board's discretion (§9) by the Fairness Rule (§9.4).	**30%**

Single-school example. A **$1,000** fundraiser your school runs alone → **$800 to your Individual School Fund** (Base $240 + Enrollment $320 + Need $240). The whole 80% is yours; the Need third is simply spent through the RFF process.

Multi-school example. A **$1,000** joint fundraiser (Stanwood High turns out 20 students, Port Susan Middle 10) → $800 school share. Base $240 splits equally ($120 each); Enrollment $320 splits 2:1 ($213 / $107); and the Need $240 goes to the shared **Need pool**. Result: Stanwood High → **$333**, Port Susan → **$227** to their Individual School Funds, $240 to the Need pool.

7.2. How and When It Is Applied

- **Base and Enrollment** are applied when a fundraiser's proceeds are recorded, and posted to the raising school(s)' Individual School Fund.
- **Need** follows the fundraiser: on a single-school event it goes to that school's Individual School Fund (spent via the RFF process); on a multi-school or district-wide event it goes to the shared Need pool, awarded on a rolling basis through §9.
- Liaisons certify each program's participation count for every fundraiser; those counts drive the Enrollment split.

Equity guardrail. Base exists to keep small and elementary programs viable, and the Need pool exists for shared and hardship needs. Before finalizing awards, the Board confirms the smallest programs are equitably supported.

8. Request for Fundraiser (RFR)

Before any school's music program promotes or runs a fundraiser, it submits a Request for Fundraiser. This reserves the activity, keeps the district-wide calendar clean, and — critically — establishes the requesting school's claim to the proceeds.

8.1. Why It Matters

- Stops two schools from chasing the same donors, venue, or weekend.
- Establishes attribution: once approved, the proceeds are the requesting school's — **80%** to its School Share, **15%** to the general fund, 5% to the emergency fund. No other school may claim them.

8.2. What Requires a Request

- Any organized fundraising activity: events, product sales, donation drives, sponsorship/business solicitations, and online campaigns.
- All fundraisers must comply with District Policy 3530 (Fundraising Activities Involving Students); events on school grounds also fall under Policy 4260 (Use of School Facilities).

8.3. Steps

1) Liaison submits the RFR form (Appendix A) with date, type, target amount, and any donors or sponsors to be approached.
2) Vice President checks the district-wide calendar and donor list for conflicts.
3) VP approves under delegated authority, or refers contested requests to the Board; the date and claim are recorded.
4) Approved fundraiser is added to the calendar and attributed to the school.
5) After the event, the school reports gross proceeds; the Treasurer applies the 80/15/5 split and records balances.

8.4. Coordination Rules

- District-wide fundraisers that benefit the pool receive priority scheduling windows set by the Board.
- Two schools wanting the same major donor or sponsor coordinate through the VP; where appropriate, the Organization makes a single joint approach rather than competing approaches.

> **Approval is your claim**
>
> An approved Request for Fundraiser is what guarantees the proceeds are yours. If a school runs an unapproved fundraiser (or one that collides with another school's approved event) the Board may direct where the resulting funds go. When in doubt, file the RFR early.

9. Request for Funds (RFF)

A Request for Funds is how money is spent. There are two very different paths, and knowing which one you are on prevents most disputes.

Path	Source	Competitive?	Approval
Low-friction	Independent School Fund	No	Treasurer + one officer (up to threshold)
Competitive	The shared Need pool	Yes	Board vote, by priority

> **Defusing the contention.** Each school keeps the **Base and Enrollment** portions of its 80%, and keeps the **Need** portion too on its *own* fundraisers. The only shared, competitive money is the **Need pool** built from **multi-school and district-wide** events, awarded through the RFF process. Keep it for real, shared, equity, or hardship needs.

9.1. Eligible and Ineligible Uses

- Eligible: instruments and repair, sheet music, uniforms/attire, festival and travel costs, clinician fees, equity/fee assistance for students, and other direct program support.
- Ineligible: anything prohibited by district policy, personal benefit to any individual, or expenses that belong to the district's own budget.
- The Stanwood-Camano Booster is a support system for additional funding. Funding from other non-profits (PTA/PTO/Boosters) is also a source for funds.

9.2. Approval Thresholds

Amount	Approval required	Turnaround
Up to **$250**	Treasurer + one other officer	**5 business days**
$250 – $2,000	Majority Board approval (may be by email)	**Next meeting or 10 days**
Over **$2,000**	Board vote at a convened meeting	**By next scheduled meeting**

9.3. Steps

1) Submit the RFF form (Appendix B) to the Secretary with quotes/estimates and the fund source marked.
2) Secretary logs it and routes it to the approver(s) for the relevant path and threshold.
3) Approver(s) check eligibility, budget availability, and conflicts (§11).
4) Decision recorded in the minutes; requester notified with any conditions.
5) Treasurer disburses against receipts; no reimbursement without documentation.

9.4. Fairness Rule for the Need Pool

> When Need-pool demand exceeds supply, the Board prioritizes by (1) student-safety and instrument-viability needs, (2) equity/access requests, (3) breadth of students served, and (4) programs that have received the least in recent cycles — *not* by which school has the loudest advocate.

9.5. Emergency Use of Funds / Approval

Occasionally a school faces a genuine, time-sensitive need that cannot wait for normal approval — a broken instrument before a performance, an urgent travel cost, a safety issue. A School Liaison or director may commit emergency funds up to **$500** without prior approval, subject to the safeguards below.

How it works

- Spend only what is necessary, up to the **$500** emergency limit, and keep all receipts.
- Submit a Request for Funds (Appendix B) marked “Emergency” within **5 business days** as post-authorization — the RFF is still required, just filed after the fact.
- The Treasurer records the expense against the school's Designated Fund (or the Emergency pool if the Board so directs).
- The Board reviews every emergency use at its next meeting to confirm the need was genuine, the amount reasonable, and the documentation complete.
- If possible contact (text, email, phone call) treasurer before spending of funds.

> **Abuse of emergency funds — the Board can pull the privilege**
>
> Emergency authority depends on trust. If the Board finds the emergency provision has been misused — spending that was not truly urgent, missing documentation, splitting purchases to stay under the limit, or repeated after-the-fact requests that could have been planned — the Board may, **by majority vote**, suspend or withdraw a school's emergency (and, where warranted, other delegated) spending authority for a defined period. The school then returns to standard pre-approval for all requests until authority is restored. Any suspension and its reason are recorded in the minutes and communicated to the school's Liaison.

10. Financial Controls and Accountability

Controls protect volunteers from suspicion and protect the Organization's charitable status. These are the minimum standards.

10.1. Core Controls

- Separation **of duties:** the person who records transactions is not the sole person who authorizes or handles cash.
- Dual **authorization:** disbursements over **$250** require two officer approvals; checks over **$2,000** require two signatures.
- Two-**person cash counts:** event cash is counted and signed off by two unrelated people before deposit.
- Separate **accounts:** Organization funds are held in the Organization's own bank account and are *never* commingled with any school ASB account (District Policy 3510).
- Per-**school ledgers:** the Treasurer tracks each school's balances separately, so attribution is always clear.
- Monthly **reconciliation:** the Treasurer reconciles every account and reports balances to the Board.

10.2. Reporting and Review

- Treasurer presents a financial report at every Board meeting, including General Fund, Need-pool, and per-school balances.
- An annual financial review is performed by an independent reviewer and shared with members.
- Required filings (IRS Forms, Washington charitable registration) are filed on time by the Treasurer.

> **501(c)(3) safeguard**
>
> No part of the Organization's net earnings may benefit any private individual. All funds must serve the charitable purpose — supporting district music programs. Because a violation can jeopardize tax-exempt status, the Board holds to these controls without exception.

11. Conflict of Interest

The most likely conflict in a district-wide booster is between schools competing for the same dollars. This section sets the rule that prevents it first, then covers personal and vendor conflicts.

11.1. The Core Rule — Funds Follow the School That Raised Them

- Every approved fundraiser's proceeds are attributed to the school that ran it. **No other school may claim, contest, or divert those funds.**
- A school's School Share belongs to that school alone.
- Grants belong 100% to the school named in the application (§6.2).
- The *only* genuinely shared, contestable money is the Need pool — awarded solely through the RFF process by Board vote, never by one school laying claim to another's proceeds.

11.2. When Two Schools Want the Same Thing

- Competing interest in the same donor, sponsor, date, or venue is resolved through the Request for Fundraiser process (§8) on a first-approved basis; the VP de-conflicts.

- A school may not approach a donor or run an event another school has already been approved for without that school's agreement and Board sign-off.
- A school may not lay claim to, or request from the Need pool, funds that are properly another school's designated proceeds.

11.3. Personal and Vendor Conflicts

- A financial interest in a vendor or contractor the Organization might pay.
- A family relationship to someone who would benefit from a decision (e.g., steering an award to one's own child's program outside the formula and RFF process).
- Serving simultaneously as district staff and as a decision-maker on funds flowing to one's own school or Program (District Policies 1610 / 5251).
- Any gift, payment, or advantage offered in connection with Organization business.

11.4. Disclosure and Recusal

- Every Board member and Liaison signs an annual COI disclosure (Appendix C) and updates it when circumstances change.
- At the start of any decision, members disclose any conflict on that specific matter — including an interest in another school's funds.
- A conflicted member leaves the discussion and does not participate; the recusal is recorded in the minutes.
- The remaining disinterested members determine whether the action is fair and in the Organization's interest before proceeding.

> **Bright line**
>
> Advocating for your own school is expected and healthy. Claiming another school's fundraiser proceeds, approaching a donor already reserved to another school, or steering a Need-pool award outside the fairness rule **is a conflict**. When in doubt, disclose and step back — it costs nothing and protects everyone.

12. Records, Transparency, and Retention

Transparency is how a district-wide organization earns the trust of every school community. Records are kept and shared as follows.

Record	Kept by	Retention
Meeting minutes & decisions	Secretary	Permanent
Financial statements & bank records	Treasurer	7 years
Tax filings & exemption letter	Treasurer	Permanent
RFR & RFF forms, allocation worksheets	Secretary / Treasurer	7 years
Grant applications & award letters	Treasurer	7 years
COI disclosures	Secretary	7 years

- An annual summary of funds raised and allocated per school is shared with all Liaisons and members.
- Allocation formulas, thresholds, and this Framework are available to any participating family on request.

13. Coordination and Dispute Resolution

13.1. Coordination

- The Vice President maintains the district-wide fundraising calendar; all fundraisers are scheduled through the Request for Fundraiser process (§8).
- District-wide events are planned collaboratively so no single school is disadvantaged.

13.2. Resolving Disagreements

- Raise the issue with the relevant officer (usually the VP or Treasurer) informally first.
- If unresolved, submit it in writing to the President for the next Board agenda.
- The Board hears all affected Liaisons and decides by majority vote; the decision and rationale are minuted.
- Disputes over which school owns particular proceeds are decided under the core rule in §11.1. Allocation-formula disputes are addressed at the annual review, not by ad-hoc mid-year changes.

14. Adoption and Amendment

This Framework takes effect on adoption by the Board and supersedes prior fundraising and allocation practices. It is reviewed at least annually. Amendments may be proposed by any Board member and require a **two-thirds** vote. Material changes to the fund split (§6) or allocation weights (§7) take effect only at the start of the next Fiscal Year.

_____ **President** Date:	_____ **Secretary** Date:

Request for Fundraiser (RFR)

Appendix A · Submit before promoting or running any fundraiser. Approval reserves the activity and your claim to the proceeds.

Filling it out: File early so the VP can de-conflict dates and donors · choose *Restricted purpose* only for a specific goal like a trip · list every donor/sponsor you'll approach · the student count feeds the Enrollment allocation.

Date submitted	
School / Program	
Liaison (name / email)	
Fundraiser type	☐ Event ☐ Product sale ☐ Sponsorship ☐ Online ☐ Other: _____
Proposed date(s)	
Venue / platform	
Estimated gross proceeds	$
Estimated expenses / net	$
Number of students participating	
Beneficiary fund	☐ General program ☐ School-designated ☐ Restricted purpose: _____
Donors / sponsors to approach	
Conflicts with another school's event or donor?	☐ No ☐ Yes — explain: _____
Compliance check	☐ Policy 3530 ☐ Policy 4260 (on school grounds) ☐ WA raffle rules (if a raffle)
Notes / additional details	

Board use

Approver(s): _____ Date: _____ **Approved:** ☐ Yes ☐ No ☐ With changes

Calendar date confirmed: _____ Proceeds attributed to: _____

What happens next: ① Submit to the VP · ② VP checks the calendar & donor list · ③ Approved & dated, or referred to the Board · ④ You're clear to promote · ⑤ After the event, report gross proceeds and the Treasurer records the split.

Request for Funds (RFF)

Appendix B · Submit to spend from your Individual School Fund, or to request from the shared Need pool.

Filling it out: Attach quotes or estimates · mark whether it's your own-fund spending (low-friction) or a Need-pool request (competitive) · for an emergency, file within 5 business days after committing (§9.5). *Approval: up to $250 Treasurer + one officer · $250–$2,000 Board majority · over $2,000 Board vote (§9.2).*

Date of request	
School / Program	
Submitted by (name / role)	
Amount requested	$
Fund source	☐ Individual School Fund (your own money) ☐ Need pool (competitive request)
Emergency post-authorization?	☐ No ☐ Yes — date funds were committed: _____
Purpose (attach quotes / estimates)	
Students / programs benefiting	
Eligible use (§9.1)	☐ Instruments / repair ☐ Sheet music ☐ Uniforms ☐ Festival / travel ☐ Clinician ☐ Fee assistance ☐ Other
Conflict of interest?	☐ No ☐ Yes — explain: _____
Notes / additional details	

Board use

Approver(s): _____ Date: _____ Decision: ☐ Approved ☐ Denied ☐ Conditional

Amount approved: $_____

What happens next: ① Submit to the Secretary with quotes · ② Routed to the approver(s) for your path and threshold · ③ Checked for eligibility, budget, and conflicts (§11) · ④ Decision recorded in the minutes; you're notified · ⑤ Treasurer disburses against receipts — no receipt, no reimbursement.

Annual Conflict of Interest Disclosure

Appendix C · Completed and signed by every Board member and School Liaison each year, and whenever circumstances change.

Filling it out: Disclose anything that could even look like a conflict — vendor or financial interests, district employment, or an interest in another school's funds. Disclosing costs nothing and protects everyone (§11).

Name	
Role	☐ Board member ☐ School Liaison — school: _____
Financial interest in any actual or potential vendor (you or a family member)?	☐ No ☐ Yes — explain: _____
Employed by the school district?	☐ No ☐ Yes — which school / role: _____
Interest in any school's funds other than your own?	☐ No ☐ Yes — explain: _____
Any relationship that could influence your decisions (describe)	

Signature

Signature: _____ Date: _____

What happens next: ① Sign and return to the Secretary · ② Filed with the Organization's records (§11.4, §12) · ③ On any matter where you have a conflict, disclose it and step back from that decision · ④ Update this form whenever your circumstances change.

Grant Request

Appendix D · Submit before applying for any grant. The Board must approve the application before it is filed (§6.2).

Filling it out: File this *before* you apply — the Board must approve any grant before it's submitted · list the funder's deadline and any match or reporting the grant requires · a grant awarded for your school goes 100% to your Individual School Fund.

Date submitted	
School / Program	
Requesting Liaison (name / email)	
Funder / grant program	
Purpose (what the grant would fund)	
Amount requested	$
Application deadline	
Match required?	☐ No ☐ Yes — amount / source: _____
Reporting / follow-up the grant requires	
Restrictions on how funds may be used	
Who will write and submit the application	
Conflict of interest?	☐ No ☐ Yes — explain: _____
Notes / additional details	

Board use

Approved to file: ☐ Yes ☐ No ☐ With conditions Approver / date: _____ Minute ref: _____
If awarded — Amount: $_____ Recorded to: _____ (Individual School Fund)
Award date: _____

What happens next: ① File this before you apply · ② Board (or its designated officer) approves the application to be filed · ③ You submit the grant application · ④ If awarded, the Treasurer records 100% to your school's Individual School Fund and tracks it · ⑤ You and the Treasurer meet the funder's restrictions, deadlines, and reporting.

Appendix E — School Liaison Contact List

Confirm contact and staffing details at the start of every school year. Each participating school holds exactly one Liaison seat (§5.3). Add or remove schools by Board vote (§5.2).

School	Liaison (name)	Contact (email / phone)
Cedarhome Elementary		
Elger Bay Elementary		
Stanwood Elementary		
Twin City Elementary		
Utsalady Elementary		
Port Susan Middle School		
Stanwood Middle School		
Stanwood High School		
Lincoln Hill High School		
Saratoga School		
Lincoln Academy		