



YORK CATHOLIC DISTRICT SCHOOL BOARD POLICY REVIEW COMMITTEE AGENDA

Catholic Education Centre, Board Room
Tuesday, April 8, 2025 6:30 P.M.

Prayer

Heavenly Father, as we gather for this meeting, unite our hearts and minds in common purpose. Grant us the wisdom to work together effectively and the humility to value each person's perspective. Guide our discussions and decisions, that they may honor You and serve our shared goals.

Land Acknowledgement

We are gathered on the ancestral lands and waters of all Indigenous Peoples, who have left their footprints on Mother Earth before us. We respectfully acknowledge those who have walked on it, those who walk on it now, and future generations who have yet to walk upon it. We pray to the Creator for strength and wisdom that all may continue to serve as stewards of the Earth.

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Feb. 2015

Feb. 2020

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15. ADJOURNMENT

MINUTES
POLICY REVIEW COMMITTEE

8. DELEGATIONS

N/A

9. STAFF PRESENTATION(S)

N/A

10. ACTION ITEMS:

a) Policy 106 Delegations to the Board

J. Sarna presented this policy and procedure which were revised to include suggested language that enhances fairness and effectiveness in delegation processes. Revisions incorporate new language and practices that are in line with other Boards procedures. The PRC Committee made recommendations to make the language and directions more clear, consistent, and concise; delegations will have a 5 minute window within which to present; signage, placards and images on clothing will not be permitted during all meetings. The delegation application form should indicate that the person is a resident of York Region and that accommodations would be made available.

MOTION: Grella/Iafrate

CARRIED

b) Policy 413 Attendance Support Program

J. Sarna presented this policy and procedure which were revised to reflect updates to Stage 1 of the Attendance Support Program and to clarify the role of the ATF Committee. The revised policy and procedure was reviewed and approved by the Human Resources Committee.

MOTION: Grella/Wigston

CARRIED

c) Policy 425 Workplace Harassment and Procedure

J. Sarna presented this policy which came forward at the February 5th PRC meeting with revisions to align with the Occupational Health & Safety Act. The policy is in keeping with the legal opinion which was provided to the YCDSB and is mentioned above.

MOTION: DiMeo/Alexander

CARRIED

11. DISCUSSION ITEM: N/A

12. INFORMATION ITEM: N/A

FUTURE MEETING DATE(S):

April 8, 2025; June 3, 2025

ADJOURNMENT:

THAT the Policy Review Committee meeting adjourned 7:57 p.m.

MOTION: DiMeo/Grella

CARRIED

YORK CATHOLIC DISTRICT SCHOOL BOARD

REPORT TO: Policy Review Committee
FROM: Administration
DATE: April 8, 2025
RE: **Policy 205 Student Government**

This report is presented to Trustees to highlight the rationale for the revisions to Policy 205 *Student Government*.

BACKGROUND:

This policy is being brought forward as part of its scheduled review, as it has not been updated since 2013. The revisions aim to enhance the transparency and inclusivity of the Student Government process in response to feedback gathered through extensive student consultation. Initially presented to Trustees at the June 4, 2024, PRC meeting, the policy was shared with all YSCPC students for consultation at the Trustees' request, with results presented at the December 2, 2024, PRC meeting. Following that meeting, Trustees requested broader consultation, leading to further engagement with all secondary students. The attached results reflect the perspectives gathered from this process.

To address key concerns raised, a short-term committee of Principal Leads has been established to develop an internal guideline outlining member selection, campaign oversight, and election processes. Many students expressed uncertainty about how Student Government operates, which can lead to disengagement. By providing clearer guidelines, the internal document will help create a more inclusive and transparent process, ensuring all students feel informed and empowered to participate.

RECOMMENDATION:

That the Policy Review Committee approve the updates to Policy 205 *Student Government*.

ATTACHMENTS

- (1) Revised Policy 205 *Student Government*.
 - (2) Policy 205 *Consultation Results*.
-

Prepared By: Alexandra Burnell-Gentile, Policy Advisor
Endorsed By: Jennifer Sarna, Associate Director



YORK CATHOLIC DISTRICT SCHOOL BOARD

BOARD POLICY	
<i>Policy Section</i> Students	<i>Policy Number</i> 205
<i>Former Policy #</i> 205	<i>Page</i> 1 of 8
<i>Original Approved Date</i> June 21, 2005	<i>Subsequent Approval Dates</i> November 26, 2013

POLICY TITLE: STUDENT GOVERNMENT

SECTION A

1. PURPOSE

The York Catholic District School Board values ~~the gifts that our students bring to our Catholic Learning Communities. We value~~ collaboration, dialogue and respect **as well as the gifts that our students bring to our Catholic Learning Communities.** ~~and w~~**We** are committed to providing meaningful student leadership opportunities, guided by Jesus' ~~inspiration~~ **example**, throughout the Board. **Senior Administration, Principals, and teachers are committed to supporting and nurturing student leadership, empowering young leaders to make positive impacts within their schools and beyond.**

2. POLICY STATEMENT **OBJECTIVE**

It is the policy of the York Catholic District School Board that our youth be empowered to become "change agents **of positive change**" through student voice and student leadership at both the Elementary and Secondary levels.

3. PARAMETERS

GENERAL

~~3.1 All funds generated by the Student Government shall be counted by two or more persons, the proper fund-counter form completed and signed and immediately brought to the school office for deposit into the school bank account.~~

~~3.2 Accurate accounting shall be maintained by School Administration to comply with the requirement of accountability for the Principal, school community and Student Government. Accurate records of daily transactions and regular reporting are to be kept in the prescribed uniform format and subject to internal and external audit.~~

3.1 Student Government shall operate in alignment with the York Catholic District Board Multi-Year Strategic Plan and the school's improvement plan.

- 3.2 Student Government at both the Elementary and Secondary levels shall adhere to the following general principles to ensure effective operation and representation:
- 3.2.1 The Student Government selection process shall be transparent and inclusive.
 - 3.2.2 All students shall have the opportunity to participate and contribute to the Student Government.
 - 3.2.3 Student Government candidates must demonstrate qualities such as leadership, integrity, responsibility, and respect for Catholic values and virtues.
 - 3.2.4 Members of Student Government shall demonstrate a commitment to serving the best interests of the student body and promoting the values of inclusivity, collaboration, and service within the school community.
 - 3.2.5 The Student Government shall collaborate with school Administration, teachers, and other student organizations to foster a positive school culture and bring forward relevant issues affecting students.
 - 3.2.6 The Student Government shall maintain open lines of communication with students and school Administration for the purpose of soliciting feedback, suggestions, and ideas for improvement.

SECONDARY

- 3.3 Every Secondary School in the York Catholic District School Board shall have an active Student Government accountable to the student body and the school Administration.
- 3.4 All Secondary Schools shall be members and active participants in the York Secondary Catholic Presidents Council (YSCPC).
- 3.5 The mandate of Student Government within its defined jurisdiction and in accordance with the York Secondary Catholic Presidents' Council YSCPC Constitution shall be to:
- 3.5.1 represent the student body
 - 3.5.2 promote opportunities for social justice activities
 - 3.5.3 enhance communication, sense of unity and Catholic leadership among the Secondary Schools
 - 3.5.4 be accountable for its activities
 - 3.5.5 coordinate activities for the student community
 - 3.5.6 organize and administer councils
 - 3.5.7 promote interdependence of councils
 - 3.5.8 represent members of all councils
 - 3.5.9 liaise with Catholic School Council, staff, school Administration and the YSCPC
 - 3.5.10 promote opportunities for leadership development
 - 3.5.11 promote a positive, safe and welcoming environment.

- 3.6 Each Secondary School shall define the process for determining the membership and format of the Student Government: **in accordance with the general principles listed under Parameter 3.2.**
- 3.6.1 **Each school shall document this process and ensure it is communicated to all students.**
- 3.7 Councils and their membership shall be defined at the school level.
- 3.8 Each Secondary School shall have a member of school Administration whose responsibilities will include an active role in Student Government.
- 3.9 Each Student Government shall have representation from a teacher staff member(s) to act as a staff advisor.
- 3.10 Each Secondary School shall determine the various councils that comprise the Student Government organization. ~~Some examples of councils that have typically comprised Student Government are:~~
- ~~Arts~~
 - ~~Athletics~~
 - ~~Chaplaincy (Luke 4:18)~~
 - ~~Drug and Alcohol Awareness~~
 - ~~Desire for Change~~
 - ~~Environmental~~
 - ~~Equity and Inclusivity~~
 - ~~Grade 9 Council~~
 - ~~Intramural~~
 - ~~Leadership Development for Grade 8 students~~
 - ~~Social Justice~~
 - ~~Spirit~~
 - ~~Student Council~~
- 3.11 Reporting procedures within the school community shall include the provision for Student Government reporting during Staff meetings and Catholic School Council meetings.
- 3.12 ~~Inservices shall be provided and funded through the Board and endorsed by the YSCPC for:~~
- ~~Student Government council members~~
 - ~~Teacher staff advisor(s)~~
 - ~~Administrative liaison(s)~~
- 3.13 ~~Inservicing shall be provided for such areas as goal setting, roles/responsibilities, conflict resolution, group dynamics and organizational structures.~~
- 3.14 **The York Catholic District School Board shall offer board-level professional development opportunities which may involve members of Student Government and other leaders.**
- 3.14.1 **Members of the YSCPC and Student Trustees may play a role in coordinating these events, ensuring they meet the needs of Student Government members and contribute to their professional growth and development.**

- 3.15 Student Government ~~shall~~ **may** be funded through an allocation from the Student Activity Fee. This may be through a per-pupil allocation or a set designation of funds.
- 3.16 The Student Government **may engage in fundraising activities in compliance with the following financial guidelines:**
- 3.16.1 It is expected that funds generated during a school year shall be expended by June 30th. Any monies remaining from Student Government activities shall be provided to the incoming council and are not to be used as an offset of the Student Activity Fee.
 - 3.16.2 **Accurate accounting shall be maintained by School Administration to comply with the requirement of accountability for the Principal, school community and Student Government.**
 - 3.16.3 **Accurate records of daily transactions and regular reporting are to be kept in the prescribed uniform format and subject to internal and external audit.**
 - 3.16.4 **When funds are generated by the Student Government, they shall be counted by two or more persons, supervised by school staff. The proper fund-counter form shall then be completed and signed and immediately brought to the school office for deposit into the school bank account.**

ELEMENTARY

- 3.17 Elementary schools in the York Catholic District School Board may have an active Student Government accountable to the student body and the school Administration.
- 3.18 ~~If Elementary Schools~~ **may** choose to create a Student Government **in which** its mandate shall be to **work with their staff advisor to:**
- 3.18.1 grow and learn as a Catholic School community
 - 3.18.2 ~~represent the student body~~
 - 3.18.3 promote opportunities for social justice activities
 - 3.18.4 bridge communication between the students, school administration and Catholic School Council
 - 3.18.5 ~~be accountable for its activities~~
 - 3.18.6 ~~coordinate activities for the student community~~
 - 3.18.7 promote a positive, safe and welcoming environment
 - 3.18.8 ensure that student opinions and concerns are heard
 - 3.18.9 promote opportunities for leadership development
- 3.19 If Elementary Schools choose to create a Student Government the school shall define the process for determining the membership and format of the Student Government, **in accordance with the general principles listed under Parameter 3.2.**
- 3.19.1 **Each school shall document this process and ensure it is communicated to all students.**
- 3.20 Each Student Government shall have representation from a teacher staff member(s) to act as staff advisor(s).
- 3.21 If Elementary Schools choose to create a Student Government the Administration in consultation with staff, shall determine ~~the various~~ **which** committees ~~that comprise the Student Government, some of which may include, but are not limited to:~~

~~Social Justice — Responsible for planning and organizing committees, events and/or activities that support and are congruent with the tenets of our Faith, such as Luke 4:18, St. Vincent de Paul, Rose of Sharon, etc.~~

~~Spirit – Responsible for planning, organizing, marketing and advertising school social and spirit events such as dances, spirit days, play dates, school plays, etc.~~

~~Technology – Responsible for helping with the technology in the school, as well as technology used during liturgies, masses, presentations, etc.~~

~~Environmental – Responsible for the organization and development of all Environmental activities in the school, such as recycling programs, planting of trees and shrubs, promotion of litter less lunch days, beautifying school grounds.~~

~~Athletic – Responsible for the organization and development of Athletic events in the school, such as tournaments, intramural sports.~~

~~Peer Mentoring – Responsible for working with younger students, assisting during recess, lunch time, etc., both in the school and on the playground.~~

4. RESPONSIBILITIES

4.1 Director of Education

- 4.1.1 To oversee compliance with the Student Government Policy.
- 4.1.2 To recognize the importance of student voice throughout the Board.

4.2 ~~Senior Administration: Superintendent of Elementary Schools~~

- 4.2.1 ~~To support the implementation and compliance with policies and related guidelines and procedures.~~

4.3 Senior Administration: Superintendent of Secondary Schools **Education: School Leadership**

- 4.3.1 To support the implementation and compliance with policies and related guidelines and procedures.
- 4.3.2 To act as a de facto member of the YSCPC.
- 4.3.3 To encourage and support Student Government activities within all York Catholic District Secondary schools.
- 4.3.4 To identify policy matters which require, or would benefit from, consultation with student representatives.

4.4 Principals

- 4.4.1 To be responsible for ensuring the existence and proper functioning of Student Government.
- 4.4.2 **To define and document the process for determining the membership and format of the Student Government and to ensure it is communicated to all students.**
- 4.4.3 **To ensure that members of the Student Government review the Constitution annually.**
- 4.4.4 To serve an active role in Student Government.
- 4.4.5 To be responsible for all Student Government activities and specifically for the appropriate processing of funds.
- 4.4.6 To ensure that Student Government events aim to be inclusive of all students.
- 4.4.7 To consult regularly with Student Government representatives on matters relating to specific issues and policies that affects the general student body within their school.
- 4.4.8 At the Secondary level to act as a liaison and resource for the YSCPC.

4.5 Staff Advisors (Secondary)

- 4.5.1 ~~To support and encourage open and honest dialogue during all YSCPC related functions / activities.~~
- 4.5.2 ~~To facilitate the Open Forum led by the Student Trustees, including reducing the number of Staff Advisors present during discussions upon request.~~

4.6 Staff Advisors (Elementary/Secondary)

- 4.6.1 To support, ~~and~~ encourage, **and monitor** open and honest dialogue during all Student Government related functions / activities.

4.7 Teachers

- 4.7.1 To assess the progress of members of the Student Government to ensure that they continue to succeed academically.
- 4.7.2 To work collaboratively with Administration, the staff advisors and student leaders to find new ways to actively engage students toward increased student success.
- 4.7.3 To support Student Government events and endeavours.

4.8 The York Secondary Catholic Presidents Council

- 4.8.1 To enhance communication and foster cooperation between students, Student Governments, and ~~secondary~~ Student Trustees in the Board.
- 4.8.2 To be inclusive of all secondary schools in the Board.
- 4.8.3 To provide a forum for secondary Student Government members to meet and voice their concerns and opinions to the Student Trustees.
- 4.8.4 To give reasonable notice to Student Governments of meeting dates, ~~s~~Student ~~t~~Trustee elections and YSCPC executive elections.
- 4.8.5 **To read and review the Constitution annually, ensuring a thorough understanding of its provisions.**
- 4.8.6 **To organize and oversee the annual Leadership Awards.**

4.9 Secondary Student Trustees

- 4.9.1 **To perform the duties of "Student Trustee" in accordance with Ontario Regulation 7/07 and YCDSB Policy 107 Student Trustees.**
- 4.9.2 **To abide by all Board policies and procedures when representing York Catholic District School Board in the role of Student Trustee.**
- 4.9.3 To give the student population a meaningful voice in Board deliberation and ~~acting~~ **act** as a conduit for the flow of information and ideas between Trustees, Staff, and the student body.
- 4.9.4 To make themselves accessible to student councils within the Board to listen to their concerns.
- 4.9.5 To attend all meetings of the York Secondary Catholic Presidents' Council.
- 4.9.6 To consult with student councils on matters being considered by the Board.
- 4.9.7 To maintain open lines of communication at all times between themselves and secondary students to discuss issues and ideas.

4.10 Secondary Student Council Members/Representatives

- 4.10.1 To serve as the main contact for consultation on matters related to the student body.
- 4.10.2 To work proactively with the school administration, when appropriate, to resolve issues related to the interests of the student body.
- 4.10.3 To work to improve school spirit in the learning environment.
- 4.10.4 To create a forum for student-led clubs and councils to meet and share information regarding student-related matters.

- 4.10.5 To represent the student body on the school council and actively voice student concerns on issues.
- 4.10.6 To keep the students in their schools informed about their role as a representative body and about the activities of the York Secondary Catholic Presidents' Council.
- 4.10.7 To inform and engage the student body in leadership opportunities available to them within the Board.
- 4.10.8 To ensure student council members/representatives continue to succeed academically.

4.11 Students

- 4.11.1 To strive to support the health and well-being and faith formation of the student community.
- 4.11.2 To be aware of the student council group activities within their school.
- 4.11.3 To bring to the attention of their student leaders any issues or suggestions that affect the student community.
- 4.11.4 To participate respectfully and ethically in the student leadership process.

5. DEFINITIONS

5.1 YSCPC Constitution and Executive Membership

The YSCPC eConstitution is a document that defines the mission statement, objectives, membership, roles, responsibilities, duties and procedures to guide the operation and collaborative decision-making of the York Secondary Catholic Presidents Council. All members of the YSCPC shall be secondary students enrolled in the York Catholic District School Board.

Membership of the YSCPC Executive consists of one:

- President
- 1st Vice President
- 2nd Vice President
- Director of Community Relations
- Director of Communication
- Secretary and Treasurer

5.2 ~~Membership in York Secondary Catholic Presidents Council (YSCPC)~~

~~Membership in the YSCPC consists of one President, 1st Vice President, 2nd Vice President, Director of Community Relations, Director of Communication, Secretary and Treasurer whose responsibilities and duties as Executive Members are outlined within the YSCPC Constitution. All members of the YSCPC shall be secondary students enrolled in the York Catholic District School Board.~~

5.3 Student Government

At both the Elementary and Secondary levels, Student Governments are the voice representing the student body in our Catholic Schools.

All Catholic Secondary School Student Governments are connected through a central organization known as The York Secondary Catholic Presidents Council (YSCPC) that meets on a monthly basis.

5.4 Staff Advisors on the YSCPC

Staff Advisors on the YSCPC shall consist of two or more Secondary School Administrators, and one Superintendent of Education: School Leadership Secondary Schools in a de facto role and a Board consultant as deemed appropriate.

5.5 Student Councils

A democratically-elected student run body that actively represents student voice and works to improve school spirit and the school community.

6. CROSS REFERENCES

YCDSB [Policy 107 Student Trustees](#)

YCDSB [Policy 603A School Fundraising Policy](#)

YCDSB [Policy 603B Fundraising for External Charitable Purposes](#)

YCDSB [Policy 606 Catholic School Councils](#)

YCDSB [Policy 803 School Generated Funds](#)

YCDSB [Procedure 803 School Generated Funds](#)

York Secondary Catholic Presidents' Council Constitution

Approval by Board	<u>June 21, 2005</u> Date
Effective Date	<u>June 22, 2005</u> Date
Revision Date	<u>November 26, 2013</u> Date
Review Date	<u>November 2018</u> Date

Policy 205 Student Government

Consultation Summary
February 2025

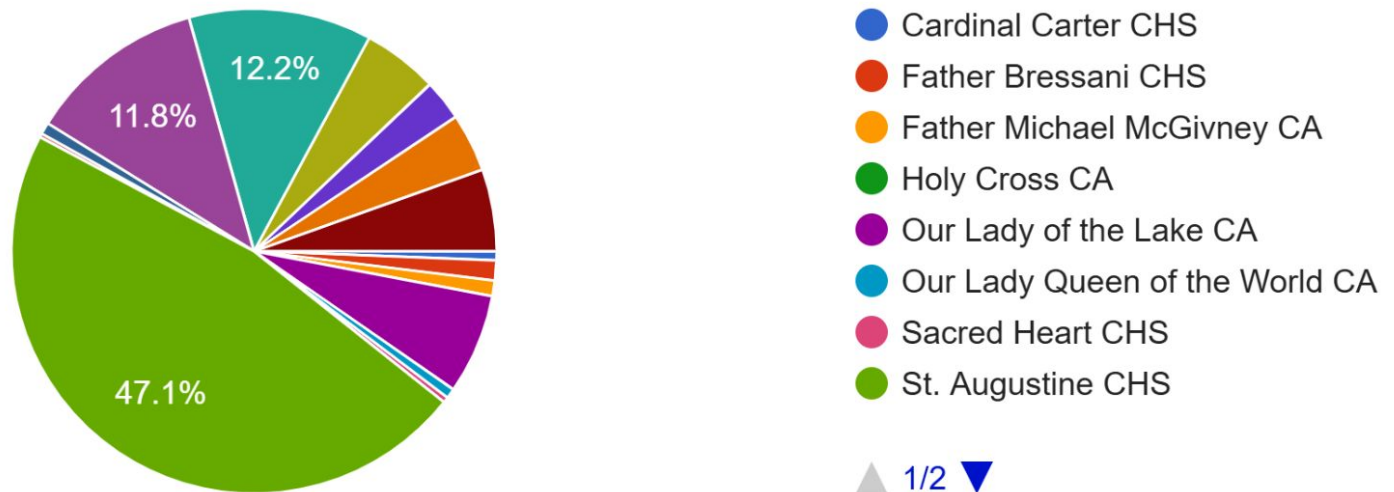




Population Consulted

School Name

1,647 responses



- Survey sent to ALL secondary students
- 1,647 responses total
- Outliers: St. Augustine CHS: 776 responses, St. Brother André CHS: 4 responses, Sacred Heart CHS: 6 responses



Selection Process

How are Student Government members chosen at your school?

1,637 responses



- A majority (44%) of students responded “I’m not sure”
 - This may highlight a potential issue with transparency & communication regarding the selection process
- 31% of students responded “By a student vote”
- 19% of students responded “A combination of student vote and staff input”
- 4% of students responded “By teacher/administration selection”



Transparency and Inclusivity in the Student Government Selection Process

The draft policy states that the Student Government selection process should be transparent and inclusive. Do you feel that the current selection process at your school meets this standard?

1,631 responses



- The majority (37%) of students responded “Yes, definitely”
- 33% of students responded “I’m not sure”
 - This aligns with the previous finding that many students don’t know how Student Government members are chosen
- 23% of students responded “Somewhat”
- 6% of students responded “No, not really”



Student Feedback on Transparency and Inclusivity in the Student Government Selection Process

Question: Please explain your perspective to the question above. If you feel the selection process is not fully transparent or inclusive, what improvements would you suggest?

- **Popularity Contest vs. Merit:**
 - A dominant theme is that student government elections are perceived as "popularity contests" rather than based on qualifications or ideas. Many respondents believe that "cool" or popular students are elected regardless of their abilities.
- **Concerns About Transparency and Inclusivity:**
 - Students expressed concerns about the lack of transparency in the selection process, including unclear criteria, unpublished voting results, and bias towards students with connections, leading to feelings of exclusion.
- **Increased Staff Involvement:**
 - Many students advocate for greater staff involvement in the selection process, suggesting teacher reviews, candidate selection, or joint staff-student decision-making to mitigate bias and ensure qualified representation.



Equal Opportunity in Student Government Participation

The draft policy states that all students shall have the opportunity to participate and contribute to Student Government. Do you believe that all students have an equal opportunity to participate in Student Government at your school?

1,623 responses



- The majority (58%) of students responded “Yes, all students have an equal opportunity”
- 26% of students responded “I’m not sure”
 - This may indicate a lack of clarity or understanding about how Student Government works and who has access
- 14% of students responded “No, some students have more opportunities than others”



Student Feedback on Equal Opportunity in Student Government Participation

Question: Please explain your perspective to the question above. If you said "No," what barriers do you think prevent some students from participating? What changes do you think would make it easier for more students to get involved?

- **Equal Opportunity vs. Equal Outcome:**
 - Many students acknowledge that everyone has the opportunity to apply or run for Student Government.
 - However, they question whether everyone has an equal chance of success.
 - Again, a dominant concern is that popularity and social standing significantly influence election outcomes.
- **Bias and Favouritism:**
 - Perceived bias from teachers and peers, along with existing connections, give some students an unfair advantage in the selection process.
- **Time and Resource Constraints:**
 - Busy schedules, extracurricular activities, and limited resources pose barriers to participation for some students.
- **Lack of Awareness and Communication:**
 - Many students are unaware of Student Government activities and opportunities, highlighting a need for improved communication.



Qualities of Student Government Candidates

The draft policy states that Student Government candidates must demonstrate qualities such as leadership, integrity, responsibility, and respect for Catholic values and virtues. Do you agree that Student Government members should embody these qualities?

1,623 responses



- A majority of students (67%) responded "Yes, definitely"
 - This indicates that most students see these traits as essential for effective representation and governance
- 18% of students responded "I don't know"
- 13% of students responded "Somewhat"
- 2% of students responded "No, not really"



Student Feedback on Qualities of Student Government Candidates

Question: Please explain your perspective to the question above. What qualities do you think are most important for Student Government members to have?

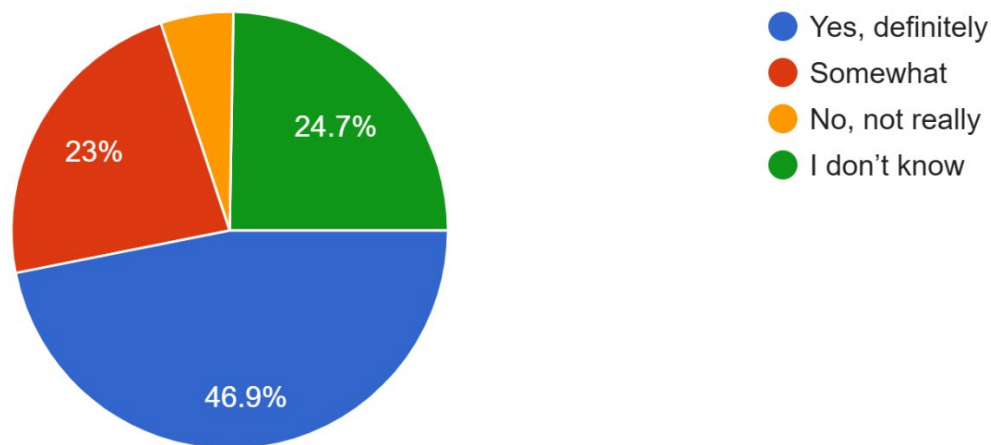
- Overall, students agree that the qualities mentioned in the draft policy (leadership, integrity, responsibility, and respect for Catholic values and virtues) are crucial for Student Government members.
- Other frequently mentioned qualities include:
 - Open-mindedness.
 - Inclusivity.
 - Creativity.
 - Honesty.
 - Confidence.
 - Hardworking.
 - Good listening skills.
- Some students express concerns that the current selection process doesn't always prioritize these qualities.
- There are some students who feel that the catholic values aspect should not be a requirement.



Leadership Growth Opportunities

The draft policy promotes professional development opportunities for Student Government members. Do you feel that your school provides enough opportunities for leadership growth?

1,617 responses



- A majority (47%) of students responded “Yes, definitely”
- 25% of students responded “I don’t know”
 - May indicate lack of awareness about the opportunities available
- 23% of students responded “Somewhat” & 3% of students responded “No, not really”
 - Indicates room for improvement in this area



Student Feedback on Leadership Growth Opportunities

Question: Please explain your perspective to the question above. What types of additional leadership opportunities would you like to see offered?

- A significant portion of students believe their school offers ample leadership opportunities through clubs, councils, and activities.
- Limited Growth Opportunities:
 - A recurring theme is that growth opportunities within Student Government are limited, especially for younger students.
 - There is a perception that the same students always get the leadership roles.
- Communication and Awareness:
 - Many students are unaware of existing leadership opportunities.
 - They call for improved communication and promotion of these opportunities.
- Students want more leadership opportunities beyond Student Government, such as: more clubs and student-led initiatives, mentorship programs, leadership workshops and training, more chances to help organize school events, & more volunteering opportunities.

YORK CATHOLIC DISTRICT SCHOOL BOARD

REPORT TO: Policy Review Committee
FROM: Administration
DATE: April 8, 2025
RE: **Policy and Procedure 304 Research and Surveys**

This report is presented to Trustees to highlight the rationale for the revisions to Policy and Procedure 304 *Research and Surveys*.

BACKGROUND:

This policy was last presented to Trustees at the October 2, 2023, PRC meeting, where administration introduced an amalgamated version of Policies 304A *Research* and 304B *Internal School Surveys*. Since then, revisions have been made to the policy and procedure to clarify the approvals process, ensuring it is easier to understand and navigate for both internal and external applicants.

RECOMMENDATION:

That the Policy Review Committee approve the updates to Policy and Procedure 304 *Research and Surveys*.

ATTACHMENTS

- (1) Revised Policy 304 *Research and Surveys*.
 - (2) Revised Procedure 304 *Research and Surveys*.
-

Prepared By: Alexandra Burnell-Gentile, Policy Advisor
Endorsed By: Jennifer Sarna, Associate Director



YORK CATHOLIC DISTRICT SCHOOL BOARD

BOARD POLICY	
<i>Policy Section</i> Program/Curriculum	<i>Policy Number</i> 304
<i>Former Policy #</i> 503/304A/304B	<i>Page</i> 1 of 8
<i>Original Approved Date</i> May 5, 2009	<i>Subsequent Approval Dates</i> December 15, 2015

POLICY TITLE: RESEARCH AND SURVEYS

SECTION A

1. PURPOSE

The York Catholic District School Board (YCDSB) supports the use of research, surveys and innovation to enhance learning, decision-making and instructional practice in support of the Board's Mission, Vision, Strategic Commitments and Multi-Year Strategic Plan. The purpose of this policy is to provide parameters and guidelines for facilitating requests to conduct research and administering surveys that are outside of the realm of Board mandate and, in order to meet the specific needs of the school, and to ensure adherence to provincial legislation, federal guidelines, and Ministry directives.

2. POLICY STATEMENT OBJECTIVE

It is the policy of the York Catholic District School Board to permit internal and external individuals or groups to conduct research and surveys that will benefit student achievement and well-being, subject to approved parameters and procedure.

3. PARAMETERS

- 3.1 All individuals who are interested in conducting research and surveys within the York Catholic District School Board shall agree to abide by this policy and procedures.
- 3.2 Research and surveys conducted within the York Catholic District School Board shall ensure uphold respect for the Catholic faith and human dignity;. They must also conform to accepted standards for research and ethical practices, comply with applicable legislation governing the Freedom of Information and Protection of Privacy and Canada's Anti-Spam Legislation (CASL), and federal guidelines, while adhering to collective agreement obligations.
- 3.3 Requests to conduct research and surveys must shall receive prior approval before inviting participation in accordance with Appendix A : Research and Surveys Approval Process.
 - 3.3.1 Internal research and survey requests shall be reviewed and approved by the Principal.
 - 3.3.2 External research and survey requests shall be reviewed and approved by the Research Advisory Committee.

- ~~3.4 Quality assurance studies, performance reviews, or testing that is **are** within the realm of Ministry/Board mandate and normal educational requirements shall not be subject to this Board review process.~~
- 3.4 Participation by individual schools, staff, parents/guardians, and students in **surveys and** research projects shall be voluntary.
- 3.5 All individuals invited to participate in **surveys and** research shall be fully informed of the **purpose**, objectives, procedures, foreseeable risks, **and** potential benefits, **and intended use of the results**.
- 3.6 Privacy, anonymity and confidentiality of data/information identifying respondents, participants and/or schools shall be strictly maintained to the full extent provided by law. ~~unless a participant or a parent of a student under 18 years of age grants express permission.~~
- 3.7 Written parental permission is required for any **external** research **projects or surveys** involving students under 18 years of age. **Where appropriate, the external researcher must obtain both parental consent and student assent.**
- 3.8 **Consistent with the Education Act**, a Vulnerable Sector Screening – Police **Reference Check (VSS)** or an **Enhanced Police Information Check (E-PIC)** **executed within the preceding six months** is required prior to commencement if any **external** researcher has direct contact with students.
- ~~3.9 **External** researchers shall ensure that they are never alone with any student(s) and shall be supervised by a Board employee.~~
- ~~3.10 **Internal and external surveys for students, conducted either online or on paper, shall be completed under the supervision of a Board/School employee unless it is an online survey that is administered to secondary students with Principal approval.**~~
- 3.11 **All individuals requesting to conduct research or administer surveys** ~~researchers~~ shall indicate in their application the intended use(s) of results, including any resources or products that may be created as a result of the project. It is understood that:
- 3.11.1 Not-for-profit resources or products shall be made available to the York Catholic District School Board, at no cost, for internal use only; and,
- 3.11.2 For-profit resources or products become the joint property of the researcher and the York Catholic District School Board unless otherwise agreed to by the Director of Education.

4. RESPONSIBILITIES

- 4.1 **Director of Education**
- 4.1.1 To oversee compliance with the Research **and Surveys** policy and procedure.
- 4.2 **Research Officer**
- 4.2.1 **To serve as a liaison between schools and individuals or groups requesting to conduct research or administer surveys in the Board.**
- 4.2.2 **To provide guidance to Senior Administration on multi-school research and survey requests.**

4.3 Research Advisory Committee

- 4.3.1 To review all requests for Board and non-board initiated **all external** research projects **or survey requests** to be conducted in the York Catholic District School Board. with respect to:
 - ~~4.2.1.1 The tenets of the Catholic faith;~~
 - ~~4.2.1.2 Their relevance to the educational objectives, priorities and research needs of the Board;~~
 - ~~4.2.1.3 Ethical considerations and protection of privacy and information;~~
 - ~~4.2.1.4 The impact on individual school(s) and the system; and,~~
 - ~~4.2.1.5 The effect on instructional time and the extent of involvement required from staff and students.~~
- 4.3.2 To approve or deny requests to conduct research or administer surveys in school(s) or the Board.
- 4.3.3 To inform Supervisory Officers and Principals of approved research requests.
- 4.3.4 To protect schools, students and staff from research that may have an adverse effect on their rights and well-being.
- 4.3.5 To serve as a liaison between schools and researchers.
- 4.3.6 To adjudicate issues that may arise from an approved research or survey request.

4.4 Senior Administration

- 4.4.1 To review and approve multi-school research and survey requests.

4.5 Superintendents of Education

- 4.5.1 To provide Principals with guidance and recommendations for school participation in research **or surveys**, as required.

4.6 Principals

- 4.6.1 To ensure adherence to the Board Research **and Surveys** policy ~~and parameters~~ and procedure.
- 4.6.2 To determine their schools' involvement and participation in **external** research **and surveys** approved and recommended by the Research Advisory Committee.
- 4.6.3 To review **and** approve ~~and/or deny~~ internal research **and survey** requests **within the** at their school. ~~received from staff, students or the Catholic School Council.~~
- 4.6.4 To oversee the individual(s) requesting to conduct research or administer surveys in the school throughout the research/survey process.

4.7 Researchers **Individuals Requesting to Conduct Research or Administer Surveys**

- 4.7.1 To ensure that the research **and survey requests** ~~complies~~ **comply** with all ~~aspects of the Board Research~~ **and Surveys** policy, ~~parameters~~, and procedure.
- 4.7.2 To submit requests to conduct ~~external~~ **surveys** or research **within** the Board **in accordance with Appendix A : Research and Surveys Approval Process.** ~~to the Research Advisory Committee and to the Principal for internal research requests.~~
- 4.7.3 To inform and communicate details of the research or survey and obtain the necessary permissions prior to commencement.

- 4.7.4 ~~To fully cooperate to the fullest extent with Principal(s) and/or Board central staff throughout the process.~~
- 4.7.5 To **uphold** ~~adhere~~ ~~perform at all times with the highest level of~~ research ~~ethical~~s and professional standards and principles of research.
- 4.7.6 To respect instructional time and ensure that survey questions are not construed to be evaluative.

5. DEFINITIONS

5.1 **Anonymity**

The practice of collecting research and survey data without any identifying or personal information.

5.2 **Confidentiality**

The ethical obligation of researchers to secure collected data and prevent unauthorized disclosure throughout its lifecycle, in accordance with professional research standards.

5.3 **External Research/Survey Request**

Refers to a formal research or survey request from an external individual or group, such as a government agency, university, college, or research institution, that is subject to approval by the Research Advisory Committee.

~~Refers to research that is conducted to benefit students and the field of education by:~~

~~5.3.1 — A Ministry or government agency;~~

~~5.3.2 — An external institution or organization;~~

~~5.3.3 — A community agency;~~

~~5.3.4 — An external individual;~~

~~5.3.5 — A Board employee collaborating with a non-Board agency or educational institution;~~

~~5.3.6 — A Board employee conducting research outside of his or her **their** area of responsibility.~~

5.4 **Informed Consent**

The voluntary agreement of a participant to take part in a research project after being fully informed about the study's purpose, procedures, and their rights, including the right to withdraw at any time. For participants under 18, parental permission and student assent are required.

5.5 **Internal Research/Survey Request**

A formal request from an internal individual or group to conduct research or surveys within a school or across multiple schools.

5.5.1 Individual school requests require approval from the Principal.

5.5.2 Multi-school requests must be approved by the appropriate member of Senior Administration.

~~Refers to a staff, school or classroom project that is to be carried out by a Board employee, Catholic School Council, or student group or Board partner that meets specific staff, classroom, school and/or Board needs. Internal research excludes School Surveys that are administered by members of a school community to meet specific needs of the school under Policy and Procedures 304 B Internal School Surveys.~~

5.6 Research

Refers to an investigation undertaken to increase knowledge and understanding through the gathering of data and information in order to develop new educational materials, products and/or processes.

5.7 Research Advisory Committee

A committee established under the direction and oversight of the Superintendent of Education: Curriculum and Assessment. ~~consisting of the following individuals: The Research Advisory Committee operates within its Terms of Reference and serves as the YCDSB's research ethics board.~~

- ~~5.7.1 Superintendent of Curriculum and Assessment, or designate;~~
- ~~5.7.2 Superintendent of Education: Exceptional Learners, or designate;~~
- ~~5.7.3 Superintendent of Education: School Leadership;~~
- ~~5.7.4 York Catholic Elementary Principals'/Vice Principals' Association (1~~
- ~~5.7.5 Representative);~~
- ~~5.7.6 York Catholic Secondary Principals'/Vice Principals' Association (1~~
- ~~5.7.7 Representative);~~
- ~~5.7.8 Ontario English Catholic Teachers' Association (OECTA) York Unit (2~~
- ~~5.7.9 Representatives);~~
- ~~5.7.10 York Catholic District School Board Research Officer;~~
- ~~5.7.11 Ad Hoc member(s) as required, for the purpose of reviewing a project that requires specific expertise not available among the Research Advisory Committee's regular members.~~

5.8 Survey

Refers to an investigation or consultation undertaken to increase knowledge and understanding by gathering information from individuals to understand attitudes, opinions, beliefs, or behaviours, on educational related topics.

6. CROSS REFERENCES

Legislation

[Anti-Racism Act, 2017](#)

[Canada's Anti-Spam Legislation \(CASL\)](#)

[Data Standards for the Identification and Monitoring of Systemic Racism](#)

[Education Act](#)

[Municipal Freedom of Information and Protection of Privacy Act](#)

[Ontario Human Rights Code](#)

[O. Reg. 521/01 Collection of Personal Information Education Act](#)

[Personal Health Information Protection Act \(PHIPA\)](#)

[Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans - TCPS 2 \(2022\)](#)

Policy

[YCDSB Policy 304A Research](#)

[YCDSB Policy 304B Internal School Surveys](#)

Related Forms

~~Admin 51~~ [Internal Research Approval Form](#)

~~Admin 52~~ [External Research Application Form](#)

~~Admin 53~~ [External Research Approval Form](#)

~~Admin 54~~ [YCDSB Internal School Survey Approval Form](#)

[Admin 51: Internal Research and Surveys Application Form](#)

[Admin 52: External Research and Surveys Application Form](#)

[Admin 55: Use of Personal Information for Research Purposes Form](#)

Approval by Board	<u>December 15, 2015</u> <i>Date</i>
Effective Date	<u>December 16, 2015</u> <i>Date</i>
Revision Dates	<u>December 15, 2015</u> <i>Date</i>
Review Date	<u>December 2020</u> <i>Date</i>

POLICY TITLE: RESEARCH

SECTION B: GUIDELINES & PROCEDURES FOR RESEARCH

~~The Board's procedures, an addendum to this policy, apply to internal and external individuals or agencies wishing to conduct research involving schools, students, staff or parents in the York Catholic District School~~

~~Board. Individuals who are interested in conducting research within the York Catholic District School Board~~

~~should contact the Board's [Research Officer](#) for additional information.~~

~~The procedures to this policy outline pertinent information related to the following components of the research application process:~~

1. ~~Criteria for Submitting a Request to Conduct Research~~

- ~~1.1 Internal Research Requests~~
- ~~1.2 External Research Requests~~

2. ~~Criteria for Approval of Research~~

- ~~2.1 Benefits for Student Achievement, **Equity** and Well Being~~
- ~~2.2 Moral, Ethical and Religious Guidelines~~
- ~~2.3 Legal Issues and Ethical Guidelines Protection of Individuals and Schools~~
- ~~2.4 Feedback and Communication~~

3. ~~Research Advisory Committee~~

- ~~3.1 Prioritization of Research Requests~~
- ~~3.2 Approval Process~~

4. ~~Research Application Process Overview~~

5. ~~Research Application and Approval Forms~~

- ~~5.1 Internal Research Approval Form (Admin 51)~~
- ~~5.2 External Research Application Form (Admin 52)~~
- ~~5.3 External Approval Form (Admin 53)~~
- ~~5.4 Use of Personal Information for Research Purposes Form (Admin 55)~~

RESEARCH & SURVEYS APPROVAL PROCESS

Request Originator	Examples of Requesters	Approval Required*	Required Forms
Internal	<u>Individual School:</u> <ul style="list-style-type: none"> ● School-Based Staff ● Catholic School Councils ● Student Councils ● Student project involving a research/survey component ● Student Teachers, or Student ECE's, completing an assignment for a course 	Approval required by Principal.	Admin 51: Internal Research and Surveys Application Form
	<u>Multi-School:</u> <ul style="list-style-type: none"> ● CEC Staff ● Student Trustees ● YSCPC ● YCPIC 	Approval required by member of Senior Administration in consultation with the Research Officer (if required).	
External	<ul style="list-style-type: none"> ● Ministry ● Government Agencies ● Universities, Colleges, Research Institutions ● Academic Accreditation (e.g Master's Thesis, Doctoral Dissertation, AQ, PQP, SOQP) ● Non-Profit Organizations ● For-Profit Organizations ● Community Agencies ● External Individuals 	Approval required by Research Advisory Committee.	Admin 52: External Research and Surveys Application Form Admin 55 (if required): Use of Personal Information for Research Purposes Form

*Please note: York Unit OECTA has exclusive jurisdiction in surveying its members. All Board surveys provided to York Unit OECTA teachers must be approved by the York Unit OECTA President or designate (*OECTA Collective Agreement Article 5*).



YORK CATHOLIC DISTRICT SCHOOL BOARD

PROCEDURE: RESEARCH **AND SURVEYS**

Addendum to Policy 304 ~~A~~: Research **and Surveys**

Effective: ~~December 2015~~ **XX**

POLICY TITLE: RESEARCH AND SURVEYS

PROCEDURES FOR SUBMISSION AND CRITERIA FOR APPROVAL OF RESEARCH AND SURVEYS

PURPOSE

These procedures apply to internal and external individuals and/or groups wishing to conduct research and surveys involving schools, students, staff or parents in the York Catholic District School Board. Individuals and/or groups who are interested in submitting a research proposal or conducting surveys within the York Catholic District School Board should ~~must review YCDSB Policy and Procedure 304 – Research and Surveys. or contact the Research Officer (research@ycdsbk12.ca) for additional information. An overview of the Board's research application approval process is outlined in Appendix "A" on pages 4 and 5 of this document.~~

1. CRITERIA FOR SUBMITTING A REQUEST TO CONDUCT RESEARCH AND SURVEYS

1.1 Internal Research and Survey Requests

Individual School Requests

- 1.1.1 Principals shall review and approve or deny internal individual school research and survey requests to be conducted in schools.
- 1.1.2 Individual school request applicants Staff, Catholic School Councils and Student Councils wishing to conduct research or administer a survey Project related to school, board or Ministry initiatives in the school and/or Board shall complete the Internal Research and Surveys Application Approval Form (Appendix B, Admin 51) and receive prior written approval from the Principal before commencing.
- 1.1.3 Students completing teacher-assigned and approved coursework or class projects involving that include a research or survey component do not require the completion of an Internal Research or Survey Approval Form.; however, they are expected to be reviewed by a School Administrator and receive approval from the Principal in advance of starting the research. must also complete the Internal Research and Surveys Application Form (Admin 51) and receive prior written approval from the Principal or designate before commencing.

Multi-School Requests

- 1.1.4 A member of the Senior Administration shall review and approve multi-school research and survey requests.
- 1.1.5 Multi-school request applicants shall complete the Internal Research and Surveys Application Form (Admin 51) and receive prior written approval from a member of the Senior Administration before commencing.
- 4.1.4 The person who approves the research project request The Principal is responsible for the overseeing supervising the internal researcher individual(s) conducting research or administering surveys in the Board or school(s) throughout the process.
- 4.1.5 Internal researchers Individual(s) conducting research or administering surveys shall submit a written summary of the findings to the Principal(s) of participating school(s).

1.2 External Research and Survey Requests

- 1.2.1 All research requests shall be forwarded to the Research Officer for review by the York Catholic District School Board Research Advisory Committee (refer to Section 3).
- 1.2.1 All external ~~investigators~~ individuals or groups wishing to conduct research or surveys within any of the educational settings of in the Board shall complete the External Research and Surveys Application and Approval Forms (Appendix B, Admin 52 & Admin 53) and receive written approval from the Research Advisory Committee. ~~prior to requesting the permission of Principals.~~
- 1.2.2 While all external proposals shall be considered, those from undergraduates and college students shall be assessed as a low priority.
- 1.2.3 Market research requests shall be considered only if there is a direct educational application or relevance to the Board's Strategic Commitments and/or the Student Achievement Plan ~~Board Plan to Improve Student Achievement and Well-Being~~. The Board may, at its discretion, impose a monetary fee for market research requests.

2. CRITERIA FOR APPROVAL OF RESEARCH AND SURVEYS

2.1 Benefits for Student Achievement and Well-Being

- 2.1.1 The research or survey shall be worthwhile and have a high degree of educational relevance.
- 2.1.2 Priority shall be given to research or surveys that support improvements in student engagement, achievement and well-being and/or inform the decision-making process.
- 2.1.3 The research or survey should demonstrate direct benefits to the school/Board, including the provision of feedback, learning opportunities, materials, and/or summary data.
- 2.1.4 The ~~research~~ process should be a meaningful experience for participants, considering the effect on instructional time and the extent of involvement required from staff and students.

2.2 Moral, Ethical and Religious Guidelines

- 2.2.1 Respect for all individuals and groups shall be ensured in all research and survey activities. Materials or scripts shall ~~not reinforce religious, racist, sexist, homophobic or other stereotypes.~~ uphold the Board's commitment to human rights and equity and benefit student achievement and well-being.
- 2.2.2 Care shall be taken to avoid contentious or personal topics that may be considered by students, staff and parents to be an invasion of privacy.
- 2.2.3 An appropriate protocol for responding to sensitive issues that may arise during the research shall be outlined in the original application.
- 2.2.4 ~~The researcher~~ Individual(s) conducting research or administering surveys shall agree to disclose all features of the research that might influence an individual's willingness to participate.

2.3 Legal Issues and Ethical Guidelines - Protection of Individuals and Schools

- 2.3.1 ~~Researchers~~ Individual(s) conducting research or administering surveys are responsible for respecting the safety, dignity and welfare of all participants and meeting all ethical requirements for research as defined by the *Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans*.

- 2.3.2 Confidentiality of participating students, staff and parents shall be assured. Conditions outlined in the *Education Act*, and the *Municipal Freedom of Information and Protection of Privacy Act*, and the *Personal Health Information Protection Act (PHIPA)* regarding the access and privacy provision of personal information shall be adhered to. Personal information shall only be obtained for the specific purposes for which it is gathered as authorized in both Acts by legislation.
- 2.3.3 Participants shall be informed upon request as to who will have access to the information, how the information will be used, where it will be stored, and who to contact for additional information about the data collected.
- 2.3.4 Appropriate safeguards shall be implemented to ensure complete anonymity of individuals and schools. Research investigators, Individual(s) conducting research or administering surveys under any circumstances, shall not identify individuals, schools or the Board in any presentation of results without prior written permission from the Director of Education.
- 2.3.5 Researchers Individual(s) conducting research or administering surveys shall respect the freedom of an individual to decline to participate in the research or survey or to discontinue participation at any stage of the process.
- 2.3.6 Approval shall not be granted for research and surveys that require students to report any of the following:
 - 2.3.6.1 Illegal activities without Parents/Guardians/Caregivers being informed of the specific questions that will be asked;
 - 2.3.6.2 Life-threatening behaviour or level of depression without detailing to students and their Parents/Guardians/Caregivers the specific supports that are available for those students who self-identify;
 - 2.3.6.3 Behaviour of others; and,
 - 2.3.6.4 Information on the student's background (e.g., ethnic or racial identifiers) without a relevant link to the research. Information on the student's physical or mental health, gender or sexual identity, race, or other personal characteristics, without a direct link to the research.
- 2.3.7 All participants shall be clearly, fairly and fully informed of the research purpose, objectives, procedures, foreseeable risks, and potential benefits and intended use of results.
- 2.3.8 Principals shall ensure that a Board/School employee supervises external individual(s) conducting research or administering surveys in the school. and that they are never alone with any student(s)
- 2.3.9 Research or survey questions shall not be construed as evaluative in nature.
- 2.3.10 Research and surveys conducted within the Board must not offer inducements, rewards, or incentives to participants in exchange for their participation.

2.4 Feedback and Communication

- 2.4.1 ~~Researchers~~ Individuals requesting approval to conduct research or administer surveys shall ensure that they comply with and obtain express consent, comply with applicable provincial legislation, federal guidelines under Canada's Anti-Spam Legislation (CASL) and abide by collective agreement obligations.
- 2.4.1 Individuals conducting research or administering surveys shall provide feedback and shall provide the approver with a brief written summary.
- 2.4.2 ~~External researchers shall provide feedback to participating school(s) through workshops, written materials or other means~~ Internal researchers:

- 2.4.2 **Individuals conducting external research or administering surveys** Researchers shall arrange for debriefing of participants, as appropriate, and the sharing of findings with participating school(s).
- ~~2.4.3 Individuals conducting internal research or surveys in an individual school are not required to give full reports to participants, school staff or parents; however, they shall provide a brief written summary to the Principal(s).~~
- 2.4.3 ~~Research reports shall contain aggregate data only.~~ **Individuals conducting research or administering surveys** Researchers shall not reveal individual data to participants, school staff or parents. Research reports shall contain aggregate data only.
- 2.4.4 **Individuals conducting research or administering surveys** Researchers shall continue to ensure that the anonymity of students, teachers and schools is preserved in subsequent publications or forums. ~~of any kind.~~
- 2.4.5 **Individual(s) conducting research or administering surveys** Researchers shall ensure that any media release referencing York Catholic District School Board data ~~receives prior approval from and is released jointly with~~ **is prepared in collaboration with** the Board's Communications Department.

3. RESEARCH ADVISORY COMMITTEE OF THE YORK CATHOLIC DISTRICT SCHOOL BOARD

3.1 Prioritization of Research and Survey Requests

- 3.1.1 Requests for research **and survey** shall be presented and reviewed at regular Research Advisory Committee meetings. ~~or by email.~~
- 3.1.2 The Research Advisory Committee shall approve requests not more than ~~three (3)~~ **five (5)** times throughout the school year during the months of ~~September, October, November, January, February, and April.~~ ~~April.~~
- 3.1.3 Proposals that receive conditional approval may receive final disposition from the Research Advisory Committee outside of the regularly scheduled meeting dates.
- 3.1.4 Priority status shall be assigned to projects that are consistent with system initiatives.
- 3.1.5 Ministry mandates and newly funded initiatives may require revisions to the timelines of some research projects or surveys that were previously approved.

4. RESEARCH AND SURVEY APPROVAL PROCESS

4.1 Internal Research and Survey Requests

- ~~4.1.1~~ The Principal shall inform the Administrator of the Internal School Survey ~~individual(s) requesting approval to conduct research or administer surveys~~ in writing the disposition of the survey request (i.e., permission granted, conditional approval or request denied) by completing and forwarding the ~~Internal Research Approval Form (Appendix B, Admin 51) or the Internal School Survey Approval Form (Appendix B, Admin 54).~~
- ~~4.1.2~~ With the approval of the Principal, members of the school community shall be invited by the Administrator of the Internal School Survey ~~individual(s) conducting the research or survey~~ to participate in the voluntary survey.

4.2 External Research and Survey Requests

- ~~4.2.1~~ Completed information packages, ~~including the External Research Application Form (Appendix B, Admin 52),~~ shall be provided ~~electronically~~ to members of ~~the Research Officer for review by~~ the Research Advisory Committee for review.
- ~~4.2.2~~ The Research Officer shall inform researchers in writing regarding the disposition of their proposal (i.e., permission granted, conditional approval or request denied).
- ~~4.2.3~~ With the permission of the appropriate Supervisory Officer, Principal(s) of the involved school(s) shall be invited to participate in the approved research project or survey. A copy of the completed Research Approval Form (Appendix B, Admin 53) shall be forwarded to the Principal(s) for final approval and signature.
- ~~4.2.4~~ Upon Principal agreement, the researcher shall be given approval to contact the school in order to make the necessary arrangements to commence the research ~~or administer the survey.~~

RESEARCH & SURVEYS APPROVAL PROCESS

Request Originator	Examples of Requesters	Approval Required*	Required Forms
Internal	<u>Individual School:</u> <ul style="list-style-type: none"> ● School-Based Staff ● Catholic School Councils ● Student Councils ● Student project involving a research/survey component ● Student Teachers, or Student ECE's, completing an assignment for a course 	Approval required by Principal.	Admin 51: Internal Research and Surveys Application Form
	<u>Multi-School:</u> <ul style="list-style-type: none"> ● CEC Staff ● Student Trustees ● YSCPC ● YCPIC 	Approval required by member of Senior Administration in consultation with the Research Officer (if required).	
External	<ul style="list-style-type: none"> ● Ministry ● Government Agencies ● Universities, Colleges, Research Institutions ● Academic Accreditation (e.g Master's Thesis, Doctoral Dissertation, AQ, PQP, SOQP) ● Non-Profit Organizations ● For-Profit Organizations ● Community Agencies ● External Individuals 	Approval required by Research Advisory Committee.	Admin 52: External Research and Surveys Application Form Admin 55 (if required): Use of Personal Information for Research Purposes Form

*Please note: York Unit OECTA has exclusive jurisdiction in surveying its members. All Board surveys provided to York Unit OECTA teachers must be approved by the York Unit OECTA President or designate (*OECTA Collective Agreement Article 5*).

YORK CATHOLIC DISTRICT SCHOOL BOARD

REPORT TO: Policy Review Committee
FROM: Administration
DATE: April 8, 2025
RE: **Policy 603A School Fundraising**

This report is presented to Trustees to highlight the rationale for the revisions to Policy 603A *School Fundraising*.

BACKGROUND:

This policy was revised as part of its scheduled review, as it was last updated on June 21, 2016. The policy has been revised to strengthen controls for fundraising activities and ensure compliance with financial best practices. Additionally, the policy has been sent to Principals for consultation, and their recommendations have been considered and incorporated as appropriate.

Major Parameters Revised:

- Fundraising plans (Admin 86) are approved by School Superintendent by October 31 each year.
- Pre-approval from School Finance is required for fundraisers that requires tax receipts.
- Lotteries and games of chance are not permitted as fundraising methods.
- For recognition/acknowledgement, follow Policy 801 Use of Board and School Funds for Recognition or Acknowledgement Purposes, and refer to Policy 808 Travel, Meals & Expense Reimbursement for meal-related recognitions.
- A School Fundraising Summary (Admin 86A) with details on initiatives, net proceeds, and disbursement be submitted to School Superintendent and School Finance by June 30th.

RECOMMENDATION:

That the Policy Review Committee approve the updates to Policy 603A *School Fundraising*.

ATTACHMENTS

(1) Revised Policy 603A *School Fundraising*.

Prepared By: Alexandra Burnell-Gentile, Policy Advisor
Endorsed By: Jennifer Sarna, Associate Director



YORK CATHOLIC DISTRICT SCHOOL BOARD

BOARD POLICY	
<i>Policy Section</i> Community	<i>Policy Number</i> 603A
<i>Former Policy #</i> 212	<i>Page</i> 1 of 8
<i>Original Approved Date</i> April 1970	<i>Subsequent Approval Dates</i> September 1990 May 2003 September 2012 May 27, 2014 June 21, 2016

POLICY TITLE: SCHOOL FUNDRAISING

1. PURPOSE

The York Catholic District School Board recognizes the importance of school fundraising to enhance the means by which educational goals are achieved. The purpose of this policy is to provide support and procedural guidelines to schools when planning and implementing fundraising activities. Throughout the planning and implementation of fundraising activities, school organizers will be sensitive to any financial impact on members of the school community.

2. ~~POLICY STATEMENT~~ OBJECTIVE

All fundraising goals shall be aligned with the Board's Mission and Values as well as the Board-level and school level improvement plans. Fundraising is intended to complement, not replace public funding for education.

3. PARAMETERS

- 3.1 The Principal, in consultation with the Catholic School Council and school staff, shall develop an annual fundraising plan, Admin Form 86, that is submitted to the School Superintendent for approval **by October 31st of each year.**
- 3.2 Recognizing that all fundraising activities in a community come from the same source, Principals and Catholic School Councils will keep in mind the financial implications on the community when approving all major fundraisers.
 - 3.2.1 There shall be no more than two major fundraisers per year. A major fundraiser involves the majority of the student body and is expected to raise at least an average of \$10 per student.
 - 3.2.2 Major fundraisers may be organized by staff or the Catholic School Council, but the Principal is ultimately responsible.
 - 3.2.3 Hot lunch and milk programs provide a service to the school community that also generate a profit whose proceeds are subject to this policy. These initiatives do not count as major fundraisers.

- 3.2.4 Minor fundraisers organized by classrooms (i.e. grade 8 trip subsidy), student groups or clubs (i.e. Arts Council), or other miscellaneous school functions (drama productions) are permitted but must be limited in scope with purpose/proceeds clearly identified in all literature/programs.
- 3.2.5 A fundraiser organized in partnership with a community or parish group may occur not more than once annually and will abide by the parameters of this policy and will focus on strengthening the relationship between home, school and Parish. (See Parameter 3.23.1 for banking requirements.)
- 3.3 All fundraising proceeds shall have an approved designated purpose and be utilized as intended, unless further approval is obtained. This purpose is to be communicated to the school community as part of the fundraising drive.
- 3.4 Any funds and assets generated through fundraising activities organized by the school or assisted by the Catholic School Council are the property of the Board.
- 3.5 In the event of a school consolidation/closure:
 - 3.5.1 Any residual fundraising monies shall be proportionately distributed, based on student enrolment, to the affected schools; and,
 - 3.5.2 All school assets purchased through fundraising or GSB, shall be distributed equitably based on a needs assessment completed by Board staff, including affected school Principals and the Area Superintendent.
 - 3.5.2.1 First, to the affected schools; and,
 - 3.5.2.2 Second, to other area schools.
- 3.6 Participation in fundraising activities is strictly voluntary for staff and students. The personal information of staff, students or other individuals will not be shared for the purpose of fundraising without prior consent.
- 3.7 A fundraising activity must not result in any staff or volunteer benefiting materially or financially from the activity. Those involved in organizing a fundraiser must be transparent regarding their personal participation in the activity.
- 3.8 The safety of students must be a primary consideration in all fundraising activities. No student shall be asked to do door-to-door canvassing including sales at local malls, plazas, or similar public locations.
- 3.9 None of the above activities shall encroach unduly on the school day, or adversely affect good public relations in a community or school.
- 3.10 Activities that involve the preparation and sale of food and beverages on school premises must comply with the YCDSB Healthy Schools Policies.
- 3.11 One of the school's major fundraisers may be the solicitation of donations to the school through the Board's Registered Charity Program. The Catholic School Council must be fully supportive of such an initiative. The Board's Registered Charity forms and guidelines are to be followed for donations that are eligible for a tax receipt. **Pre-approval from School Finance must be obtained at least one week prior to the start of any fundraiser that requires tax receipts.**
 - 3.11.1 The collection of approved donations to the school can be made at the same time as the collection of the voluntary secondary Student Activity Fee. It must be clearly delineated from the Student Activity Fee on the

form and clearly marked Voluntary Contribution to Catholic School Council Fundraising.

- 3.11.2 In order to be eligible for an income tax receipt, the donation must be voluntary without any legal obligation or expectation of benefit to the donor. Advertising is considered a benefit to the donor. As per Canada Revenue Agency advertising includes the display of business logos and/or business cards; therefore no income tax receipt will be issued if a business logo or business card is displayed on the donor's behalf (i.e. yearbook, website, newsletters, uniforms, etc).
- 3.11.3 Donation amounts or amount categories with personal names shall not be displayed or communicated. However, acknowledging the donor name without specifying the amount is appropriate.
- 3.11.4 With regards to donations from businesses, donation amount classifications (i.e. gold, silver, bronze) may be displayed along with the business names. No income tax receipt will be issued if a business logo or business card is displayed on the donor's behalf (i.e. yearbook, website, newsletters, uniforms, etc.) as this is considered advertising.

~~3.12 If the fundraising event is a lottery/raffle/bingo it will require a license as regulated by the Alcohol and Gaming Commission of Ontario (AGCO) and any other applicable regulations. Information and application forms are available through local municipality offices. The school will be required to maintain a separate bank account and proper records in accordance with the license application. License applications must be organized and sustained by the individual school as required and these financial records are subject to the Board and School's standard financial reporting requirements and audit. It is the School Principal's responsibility to ensure that all current regulations are followed and appropriate records are maintained.~~ Lotteries and games of chance in any form, are strictly prohibited on all YCDSB premises. This restriction aligns with legal guidelines governing fundraising activities within the Board. Schools must ensure that all fundraising initiatives comply with this policy by only using fundraising methods that do not involve lotteries or games of chance.

- 3.13 Once a major fundraiser is complete, the results must be communicated between the School Administrator and Catholic School Council with a detailed accounting of the gross and net proceeds as well as a budget for the spending of the funds in a timely manner. Once the budget has been finalized, the above information will be shared with the school community via school newsletter and school web site.
- 3.14 Fundraising proceeds will be used for school purposes and are to complement, not replace, public funding for education. Fundraising proceeds are intended for the purchases of supplementary materials, equipment or services not funded through the allocated budget of a school board. Purchases are not to be for items that are considered core curriculum.
- 3.15 As part of their school level planning, schools may decide to develop a multi-year fundraising plan geared towards achieving a major initiative (i.e. school shade project, yard naturalization, outdoor classroom). These funds should be set aside in a Special Project Reserve sub-ledger in order to track them separately.

- 3.16 Proceeds may be used to subsidize students who cannot afford extra-curricular activities.
- 3.17 Extra-curricular activities and events may be subsidized with fundraising proceeds.
- 3.18 Proceeds may be used for school yard and sports facilities improvement projects through the School Enhancement Request Form (Admin 56/56A) and process. These improvements may not result in a significant increase in school or board operating or capital costs and future maintenance and repairs.
- 3.19 Improvements to school facilities (painting, gymnasium upgrades, etc), through the completion of the School Enhancement Request Form (Admin 56/56A) and process may be supported by fundraising proceeds. These improvements may not result in an increase in the student capacity of a school or a significant increase in school or board operating or capital costs and future maintenance and repairs shall be considered.
- 3.20 Fundraising proceeds may not be utilized for categories of facility renewal, maintenance or upgrades, which are approved to be funded by Ministry of Education grants.
- 3.21 Fundraising proceeds may not be utilized for goods or services from employees where such purchases would contravene the *Education Act* or *Policy 423 Conflict of Interest Policy for Employees*.
- 3.22 Fundraising proceeds may not be utilized for political activities, administrative expenses (that are not directly associated with the fundraising activity) or staff training or professional development including support for teacher attendance at professional development activities.
- 3.23 Fundraising proceeds may be used to purchase recognition/acknowledgments for school community members. ~~The value of any single recognition/ acknowledgement shall not exceed one hundred dollars (\$100.00).~~ Refer to *Policy 801 Use of Board and School Funds for Recognition or Acknowledgement Purposes* (maximum of \$100) and if the recognition/acknowledgement is in the form of meals refer to *Policy 808 Travel, Meals & Expense Reimbursement for meal allowances*.
- 3.24 Liability and Insurance
- 3.24.1 Staff and Principal-authorized volunteers shall be protected against claims arising from the handling and management of fundraising activities through the Board's liability insurance coverage, subject to the terms and conditions of the policy.
- 3.24.2 The Board shall be protected against claims arising from the handling of proceeds raised from fundraising activities, through its crime insurance coverage, subject to the terms and conditions of the policy.
- 3.24.3 Staff and Principal-authorized volunteers shall utilize risk management practices that promote safety, accountability and due diligence in the handling and management of fundraising activities and the proceeds raised from fundraising activities in an effort to minimize related risks and exposure to liability.

3.25 Financial Procedures

3.25.1 BANKING

- 3.25.1.1 The proceeds of fundraising activities shall be deposited into the appropriate school level bank account.
- 3.25.1.2 If fundraising is approved through the Board's Registered Charity Program these funds are held in trust in YCDSB's registered charity bank account.
- 3.25.1.3 If funds are raised in partnership with a community or parish group (ref. 3.2.5) the proceeds may be deposited initially to the community partner account and then the schools' portion allocated to the school bank account.
- 3.25.2 Accurate accounting shall be maintained by school administration and the treasurer of the Council to comply with the requirement of accountability for both to the Principal and the school community.
- 3.25.3 Accurate records of daily transactions and regular reporting through the school level bank accounts using appropriate subledgers to track funds for each designated purpose are to be kept in the prescribed uniform format and subject to internal and external audit.
- 3.25.4 Aside from funds set aside in a Special Project Reserve sub-ledger, fundraising proceeds should be spent during the school year in which they are raised.
 - 3.25.4.1 As a guideline, no more than 10% of a school's net fundraising proceeds should be carried forward to the following school year.
 - 3.25.4.2 Notwithstanding the above, it would be prudent to carry forward a small amount annually (suggested amount \$1,000) to cover any school start up costs a Catholic School Council may incur.
- 3.25.5 The Principal will complete an Admin 86A School Fundraising Summary including each major and minor fundraiser as well as net proceeds of any hot lunch, milk or snack programs. The form will be submitted to the office of the Superintendent of Education and the ~~Budget & Audit Services Department~~ School Finance Department by June 30th annually for reference. At the same time, the Principal will also post a summary of all the above initiatives, their net proceeds, and their disbursement on the school web site.

4 RESPONSIBILITIES

4.1 **Director of Education**

- 4.1.1 To oversee compliance with the School Fundraising Policy.

4.2 **Superintendent of Education, School Leadership**

- 4.2.1 To review, on an annual basis, the projected and actual fundraising events of each school.
- 4.2.2 To provide guidance to principals on what can be included in fundraising activities.
- 4.2.3 To act as a resource on any questions regarding interpretation of this policy.

4.3 Principal

- 4.3.1 To ensure that this policy is followed and that the fundraising has a designated purpose that is consistent with the school board's mission and values as well as the school improvement plan, and that the proceeds are used for their intended purposes. Activities will support student achievement and not detract from the learning environment.
- 4.3.2 To establish procedures in consultation with the Catholic School Council for approving expenditures and the allocation of all fundraising monies.
- 4.3.3 To complete all documentation as outlined in the School Generated Funds Administrative Procedures.
- 4.3.4 To ensure that staff and authorized volunteers are aware of this Policy and related School Generated Funds Administrative Procedures.
- 4.3.5 To supervise the record keeping of all fundraising revenues and expenditures that occur.
- 4.3.6 To review safety instructions with the students, **staff and volunteers**.
- 4.3.7 To be aware/manage the risk involved in the fundraising activity, i.e. supervision, safe location etc.
- 4.3.8 To ensure the school community is informed regarding participation and support of major fundraising events, and to give a financial overview of these activities as per this Policy.

4.4 **Budget and Audit Services School Finance Department**

- 4.4.1 To ensure adherence to all Administrative Procedures, Guidelines and Policies through training and internal audits.

4.5 Catholic School Council

- 4.5.1 To work with the Principal to: develop an annual major fundraising plan, to inform the school community regarding participation and support of major fundraising events, to prioritize the spending of fundraising proceeds based on school level goals and to give a financial overview of these activities.

4.6 Students/Parents

- 4.6.1 To have parental permission before approaching any potential supporter.
- 4.6.2 **To ensure direct online donations are made through the Board-approved platform for online payment or, in the case of charitable fundraisers, through CanadaHelps.org wherever possible.**
- 4.6.3 To keep all monies at home, for all major fundraisers, until the total amount has been collected. ~~Parents are encouraged to write a cheque, payable to the school for the full amount. In this way cash is not transported to school. Parents are responsible for any charges the school incurs because of individual NSF cheques.~~

5. DEFINITIONS

5.1 Board Registered Charity Program

The program has been established, as regulated by Canada Revenue Agency, for the advancement of religion and education in our schools. Through this program, the Board may provide income tax receipts for voluntary donations. Individual schools can apply to the Budget and Audit Services Department to have an applicable fundraising activity approved and processed through the Board's registered charity program. If a program or transaction is questionable, no income tax receipts will be issued; pre-approval is required in order to ensure

absolute compliance. Donations must be allocated for specific purposes in conjunction with the school's fundraising plan and the approved program is considered a major fundraising event.

5.2 Core Curriculum

Core curriculum materials are learning materials that are required for completion of a unit of study or a high school course credit. These include items that are funded through the allocated budget of a school board including, but not limited to: textbooks, classroom bibles, workbooks, cahiers, resource materials, science supplies, lab materials kits, safety goggles. Classroom supplies are items used in the classroom to facilitate effective learning.

5.3 Extracurricular Activities

Extracurricular special events or activities are extensions to the curriculum and not required for graduation. Examples include, but are not exclusive to: field trips, excursions, guest speakers, presentations, ceremonies, student awards and prizes, school team uniforms, sports competition expenses, and school clubs.

5.4 Facilities Renewal

Facilities renewal addresses the cost of repairing and renovating schools and are projects which would normally cost more than \$10,000 and convey a benefit over more than one year (i.e. extends the previously assessed useful life of the building structure and/or installed component/systems; decreases operating costs; increases building or system capacity and/or quality).

5.5 ~~Lottery License~~

~~Lotteries in Ontario are strictly governed by the Alcohol and Gaming Commission of Ontario (AGCO). If fundraising involves certain event types (i.e. bingo, raffle tickets, break open ticket lotteries, Monte Carlo events, etc) the school must adhere to AGCO regulations. Depending on the value of the prizes offered a A license may be is required through the municipality or the province. The most current AGCO information and forms are available through municipal offices.~~

5.6 School Enhancement Requests

Permission to Enhance/improve a school facility using fundraising proceeds is granted per the YCDSB Form Admin. 56 School Supplementary Request Form and process.

5.7 Supplementary Materials

Materials required beyond those required for core curriculum as determined by the Principal in consultation with the Superintendent of Education.

Supplements may include:

- items that are not required as part of the regular day school program;
- items or activities that are non-essential or extracurricular in nature;
- a voluntary upgrade or substitute of a more costly material to the materials provided for course purposes;
- specialized optional programming (International Baccalaureate, Advanced Athletics, Regional Arts, Laptop Learning and any other board recognized specialized program).

6. CROSS REFERENCES

Legislation

[Education Act](#)

[Municipal Freedom of Information Protection of Privacy Act](#)

YCDSB Policies

YCDSB Policy 201 [Healthy Schools](#)

YCDSB Policy 201A [Healthy Schools: Eating & Nutrition](#)

YCDSB Policy 201B [Healthy Schools: Physical Activity](#)

YCDSB Policy 312A [Textbooks, Program Enhancement Fees or Replacement of Materials
Elementary](#)

YCDSB Policy 312B [Textbooks, Program Enhancement Fees or Replacement of Materials
Secondary](#)

YCDSB Policy 423 [Conflict of Interest for Employees](#)

YCDSB Policy 603B [Fundraising for Charitable Purposes](#)

YCDSB Policy 608 [Volunteers in Schools](#)

YCDSB Policy 803 [School Generated Funds](#)

YCDSB Procedures/Forms

YCDSB Procedure 803 [School Generated Funds](#)

YCDSB Registered Charity Program Guidelines

YCDSB Independent Procedure [School Enhancement Request](#)

YCDSB Independent Procedure [School Enhancement Request \(Competitive Bid Projects
\\$10,000+\)](#)

YCDSB Form Admin. 86 Projected Fundraising for the School Year

YCDSB Form Admin. 86A School Fundraising Summary

Canada Revenue Agency [List of Charities](#)

Approval by Board	<u>June 21, 2016</u> Date
Effective Date	<u>June 22, 2016</u> Date
Revision Dates	<u>June 21, 2016</u> Date
Review Date	<u>June 2021</u> Date

YORK CATHOLIC DISTRICT SCHOOL BOARD

REPORT TO: Policy Review Committee
FROM: Administration
DATE: April 8, 2025
RE: **Policy 603B Fundraising for External Charitable Purposes**

This report is presented to Trustees to highlight the rationale for the revisions to Policy 603B *Fundraising for External Charitable Purposes*.

BACKGROUND:

This policy was revised as part of its scheduled review, as it was last updated on November 27, 2018. The policy has been revised to strengthen the controls for fundraising. Additionally, the policy has been sent to Principals for consultation, and their recommendations have been considered and incorporated as appropriate.

Major Parameters Revised:

- The Principal, on an annual basis by June 30th, will report to the Superintendent of Education with a summary of all charitable projects and post the report on the school website.
- When external charities provide an option of online collections, direct online donations to the charity are encouraged.

RECOMMENDATION:

That the Policy Review Committee approve the updates to Policy 603B *Fundraising for External Charitable Purposes*.

ATTACHMENTS

(1) Revised Policy 603B *Fundraising for External Charitable Purposes*.

Prepared By: Alexandra Burnell-Gentile, Policy Advisor
Endorsed By: Jennifer Sarna, Associate Director



YORK CATHOLIC DISTRICT SCHOOL BOARD

BOARD POLICY	
<i>Policy Section</i> Community	<i>Policy Number</i> 603B
<i>Former Policy #</i> 212	<i>Page</i> 1 of 4
<i>Original Approved Date</i> September 2012	<i>Subsequent Approval Dates</i> June 4, 2013 November 27, 2018

POLICY TITLE: FUNDRAISING FOR EXTERNAL CHARITABLE PURPOSES

1. PURPOSE

As Catholics we are called to 'love our neighbour'. The York Catholic District School Board is committed to supporting those in need, be they in our immediate community or on the other side of the globe. Charitable projects and fundraising for these purposes are encouraged in the classroom, in the school and Board-wide.

2. ~~POLICY STATEMENT~~ OBJECTIVE

All charitable projects and fundraising activities shall be for an approved organization and related to charitable, humanitarian, educational or service activities consistent with the tenets of Catholicism and the Board's mission and values. Activities will be developed and organized with the advice and assistance from the school community.

3. PARAMETERS

- 3.1 All charitable projects undertaken by a classroom, school club, student council, Catholic School Council, or by the school as a whole, shall be approved by the Principal ~~and consistent with the Board approved charities:~~ **and shall be consistent with Catholic values that affirm the dignity of the human person and model responsible stewardship.**
- 3.2 ~~All charitable fundraising proceeds shall have an approved designated purpose, be aligned with Catholic values that affirm the dignity of the human person and model responsible stewardship.~~
- 3.3 Activities to raise funds for support of charities shall only be organized if the charity is listed on the Canada Revenue Agency website. All exceptions to this practice (e.g. collection of funds for individual community charitable needs) must have written approval from the Superintendent of Education and must also be approved by the Director of Education if the expected amount to be raised is in excess of \$1,000. This is not applicable for gift-in-kind collections. The funds raised for external charities shall be recorded in a separate sub-ledger.
- 3.4 The Principal, on an annual basis ~~each~~ **by June 30th**, will report to the Superintendent of Education a summary of all charitable projects and post the report on the school website.

- 3.5 Recognizing that all fundraising activities in a community come from the same source, Principals will keep in mind the financial implications on the community when approving all major fundraisers.
- 3.5.1 There shall be no more than two major charitable fundraisers (one per term) in one year. A major fundraiser involves the majority of the student body and is expected to raise at least an average of \$10 per student.
- 3.5.2 Minor charitable fundraisers organized by classrooms or student groups should be spaced out and limited in scope so that the school is not constantly fundraising. Consideration should be given to having these charitable drives be non-monetary in nature or limited to 'loonie' and 'toonie' drives.
- 3.6 Participation in charitable projects and fundraising activities is strictly voluntary for staff and students. The personal information of staff, students or other individuals will not be shared for the purpose of fundraising without prior consent.
- 3.7 A fundraising activity must not result in any student, staff or volunteer benefiting materially or financially from the activity. All proceeds will go to the charity intended.
- 3.8 The safety of students must be a primary consideration in all fundraising activities. No student shall be asked to do door-to-door canvassing including sales at local malls, plazas, or similar public locations.
- 3.9 None of the above activities shall encroach unduly on the school day, or adversely affect good public relations in a community or school.
- 3.10 Liability and Insurance
- 3.10.1 Staff and Principal-authorized volunteers shall be protected against claims arising from the handling and management of fundraising activities through the Board's liability insurance coverage, subject to the terms and conditions of the policy.
- 3.10.2 The Board shall be protected against claims arising from the handling of proceeds raised from fundraising activities, through its crime insurance coverage, subject to the terms and conditions of the policy.
- 3.10.3 Staff and Principal-authorized volunteers shall utilize risk management practices that promote safety, accountability and due diligence in the handling and management of fundraising activities and the proceeds raised from fundraising activities in an effort to minimize related risks and exposure to liability.
- 3.11 Activities that involve the preparation and/or sale of food and beverages on school premises must comply with the YCDSB Healthy Schools Policies.
- 3.12 The proceeds of fundraising activities shall be deposited into the appropriate school level bank account unless the external charitable organization offers tax receipts to donors or has a method for directly collecting funds. If this is the case, the collections will not be deposited into the school's bank account, but directly provided to the charity in the prescribed format. **When external charities provide an option of online collections, this option should be selected.**
- 3.13 Accurate accounting shall be maintained by school administration and the treasurer of the Council to comply with the requirement of accountability for both

to the Principal and the school community.

- 3.14 Accurate records of daily transactions and regular reporting through the school level bank accounts are to be kept in the prescribed uniform format and subject to internal and external audit.

4. RESPONSIBILITIES

4.1 Director of Education

- 4.1.1 To oversee compliance with the Fundraising for External Charitable Purposes policy.

4.2 Superintendent of Education, School Leadership

- 4.2.1 To support the implementation and compliance with the policies and related guidelines and procedures.
- 4.2.2 To review and authorize by signature, on an annual basis, the projected fundraising events of each school.
- 4.2.3 To provide guidance to principals on what can be included in fundraising activities.
- 4.2.4 To act as a resource on any questions regarding interpretation of this policy.

4.3 Principal

- 4.3.1 To approve **all** charitable projects in accordance with this policy.
- 4.3.2 To ensure that staff and authorized volunteers are aware of this Policy and related School Generated Funds Administrative Procedures.
- 4.3.3 To ensure that the fundraising has a designated purpose that is consistent with the school board's mission and values, and that the proceeds are used for that purposes, as intended.
- 4.3.4 To complete all documentation as outlined in the School Generated Funds Administrative Procedures and to supervise the record keeping of all fundraising revenues and expenditures that occur.
- 4.3.5 To ensure the school community is informed regarding participation and support of major fund-raising events, and to give a financial overview of these activities as per this policy.
- 4.3.6 To review safety procedures with students.
- 4.3.7 To be aware/manage the risk involved in the fundraising activity, i.e. supervision, safe location etc.

4.4 ~~Budget and Audit Services~~ School Finance Department

- 4.4.1 To ensure adherence to all Administrative Procedures, Guidelines and Policies through training and internal audits.

4.5 Catholic School Council

- 4.5.1 For the activities that they are directly involved with, the Catholic School Council will communicate to the school community the participation and support of the event and provide a financial overview of the activities annually at the final Catholic School Council meeting of the current school year.

4.6 Students/Parent(s)/Guardian(s)

- 4.6.1 To have parental permission before approaching a friend or relative.
- 4.6.2 To be accompanied by a responsible guardian while approaching a friend or a relative.

- 4.6.3 To keep all monies at home until the total amount has been collected for all major charitable fundraisers. ~~Parents are encouraged to write a cheque, payable to the school for the full amount. In this way cash is not transported to school. Parents are responsible for any charges the school incurs because of individual NSF cheques.~~ Wherever possible, direct online donations to the charity are encouraged.

5. DEFINITIONS

5.1 Gifts in Kind

Also known as non-cash gifts, are gifts of property. For the purpose of this policy these would include items donated for charitable purposes.

5.2 Approved Charitable Organization

A charitable organization that is currently registered with Canada Revenue Agency or a specific cause as approved by the Superintendent of Education or Director (refer to parameter 3.3).

6. CROSS REFERENCES

Legislation

[Education Act](#)

[Municipal Freedom of Information Protection of Privacy Act](#)

YCDSB Policies

YCDSB Policy 201 [Healthy Schools](#)

YCDSB Policy 201A [Healthy Schools: Eating & Nutrition](#)

YCDSB Policy 201B [Healthy Schools: Physical Activity](#)

YCDSB Policy 423 [Conflict of Interest for Employees](#)

YCDSB Policy 603A [School Fundraising](#)

YCDSB Policy 608 [Volunteers in Schools](#)

YCDSB Policy 803 [School Generated Funds](#)

YCDSB Procedures/Forms

YCDSB Procedure 803 [School Generated Funds](#)

YCDSB Registered Charity Program Guidelines

~~YCDSB St. Tabitha's Gift, A Guideline for Charitable Supports~~

~~(Includes school template for submission of funds to charitable organization)~~

YCDSB Form Admin. 86 Projected Fundraising for the School Year

YCDSB Form Admin 86B Fundraising for External Charitable Purposes Summary

Canada Revenue Agency [List of Charities](#)

Approval by Board	<u>November 27, 2018</u> Date
Effective Date	<u>November 28, 2018</u> Date
Revision Date	<u>November 27, 2018</u> Date
Review Date	<u>November 2023</u> Date

YORK CATHOLIC DISTRICT SCHOOL BOARD

REPORT TO: Policy Review Committee
FROM: Administration
DATE: April 8, 2025
RE: **Policy and Procedure 803 School Generated Funds**

This report is presented to Trustees to highlight the rationale for the revisions to Policy and Procedure 803 *School Generated Funds*.

BACKGROUND:

This policy and procedure have been revised to strengthen the controls for School Generated Fund activities and have been updated for the adoption of the cashless online system. Additionally, sections within the procedure have been reorganized to enhance readability and priority. The policy and procedure have also been sent to Principals for consultation, and their recommendations have been considered and incorporated as appropriate.

Major Parameters Revised:

- School generated funds should have a designated purpose when they are being collected and the proceeds should be used for that purpose.
- Crowdsourcing through third party collections (e.g. GoFundMe) are prohibited due to inherent reputational risk to the school and lack of school control to ensure the funds are spent on the designated purpose.
- The use of Board approved platforms for online payment is recommended for the collection of school generated funds. Schools should not receive funds from accounts set up through individual staff or volunteers where the payments have been processed by a non-Board approved payment processor or online website.
- All funds collected must have an online payment option. Parents/Guardians will be provided with alternative methods of payment due to individual circumstances.
- The Principal Transition Financial Checklist should be completed by both the outgoing and incoming principals and a copy sent to the School Finance Department.
- The Principal Monthly Checklist should be completed fully by the Principal and a copy sent to the School Finance Department.
- Public relations expenditures have been removed from the Procedures. The Parent Engagement fund, is to be used to support programs, strategies and initiatives that involve parents or the school community. If additional funds are required, the principal should work with the Catholic School Council to apply for Parent Reaching Out (PRO) Grant funding.

RECOMMENDATION:

That the Policy Review Committee approve the updates to Policy and Procedure 803 *School Generated Funds*.

ATTACHMENTS

- (1) Revised Policy 803 *School Generated Funds*.
- (2) Revised Procedure 803 *School Generated Funds*.
- (3) Policy 603A, 603B, and 803 *Consultation Results*.

Prepared By: Alexandra Burnell-Gentile, Policy Advisor
Endorsed By: Jennifer Sarna, Associate Director



YORK CATHOLIC DISTRICT SCHOOL BOARD

BOARD POLICY	
<i>Policy Section</i> Finance	<i>Policy Number</i> 803
<i>Former Policy #</i>	<i>Page</i> 1 of 6
<i>Original Approved Date</i> June 4, 2013	<i>Subsequent Approval Dates</i> June 21, 2016 July 14, 2020 May 25, 2021

POLICY TITLE: SCHOOL GENERATED FUNDS

1. PURPOSE

The York Catholic District School Board recognizes the need to be transparent and accountable when determining the distribution of funds which are raised at the school level for the purpose of enhancing the means by which educational goals are achieved.

2. OBJECTIVE

School generated funds shall be used to enhance the learning environment in schools and shall be aligned with the Board's Vision and Strategic Plan.

3. PARAMETERS

- 3.1 Each school shall operate one external bank account for funds generated at the school level.
~~3.1.1 Exceptions to this include only those School Councils that have not yet moved their funds into the school bank account.~~
 - 3.1.2 School Councils that have their funds incorporated into the school bank account shall have those funds in separate sub-ledger(s).
- 3.2 The Principal and School Bursar or Sr. School Secretary will be the signatories on the school bank account. An alternate signatory is recommended (Vice Principal or Designate).
- 3.3 School generated funds include, but are not exclusive to, HST rebate, cafeteria commission, photographer commission, uniform commission, vending machine commission, PRO grants, etc. and must be processed through the individual school bank accounts and sub-ledgers. ~~This~~ A summary of this information is to be shared annually with the Catholic School Council.
- 3.4 School generated funds also include supplementary material fees, student activity fees, co-curricular fees, excursion/field trip fees and fundraising, all of which are covered with specific policies as noted in the Cross Reference section.

- 3.5 School generated funds shall be used for school purposes and are to complement, not replace, public funding for education. Funds shall be utilized for supplementary materials, equipment or services not funded through the allocated budget of a school board. Purchases are not to be for items that are considered core curriculum.
- 3.6 School generated funds should have a designated purpose when they are being collected and the proceeds should be used for that purpose.
- ~~3.7 School generated funds may be utilized to offset costs for students who cannot afford to fully participate in school activities.~~
- 3.8 Activities to raise funds for support of charities shall only be organized if the charity is listed on the Canada Revenue Agency website. All exceptions to this practice (e.g. collection of funds for individual community charitable needs) must have written approval from the Superintendent of Education and must also be approved by the Director of Education if the expected amount to be raised is in excess of \$1,000. This is not applicable for gift-in-kind collections. The funds raised for external charities shall be recorded in a separate sub-ledger.
- 3.9 Crowdsourcing through third party collections (e.g. GoFundMe) are prohibited due to inherent reputational risk to the school and lack of school control to ensure the funds are spent on the designated purpose.
- 3.10 Co-curricular activities/events and school nutrition programs may be subsidized with school generated funds.
- 3.11 School generated funds may be utilized to offset costs for students who cannot afford to fully participate in school activities.
- 3.12 School generated funds may be used for school yard and sports facilities improvement projects through the School Enhancement Request Form (Admin 56/56A) and process, within the limits outlined in Board procedures. These improvements may not result in a significant increase in school or board operating or capital costs and future maintenance and repairs.
- 3.13 Enhancements to school facilities (painting, gymnasium upgrades, etc.), through the completion and approval of the School Enhancement Request Form (Admin 56/56A) process and within the limits outlined in Board procedures, may be supported by school generated funds. These improvements may not result in an increase in the student capacity of a school or a significant increase in school or board operating or capital costs. Annual costs of future maintenance and repairs resulting from the work may be considered.
- 3.14 School generated funds may not be utilized for facility renewal, maintenance or upgrades that are to be fully funded through grants the School Board receives for renewal from the Ministry of Education.
- 3.15 School generated funds may not be utilized for goods or services from employees where such purchases would contravene the *Education Act* or *Policy 423 Conflict of Interest Policy for Employees*.

- 3.16 School generated funds may not be utilized for political activities or administrative expenses.
- 3.17 Funds generated at the school level shall be expended, where possible, within the school year. If, as part of their school level planning, schools decide to develop a multi-year plan geared towards achieving a major initiative (i.e. school shade project, yard naturalization, outdoor classroom) these funds should be set aside in a special reserve sub-ledger.
- 3.18 In exceptional circumstances (i.e. strike lockout, pandemic closure), where funds cannot be fully expended as planned, schools can carryforward their funds to be used in subsequent years with the Catholic School Council and Principal's approvals. Schools should use the funds for the purpose that it was raised (e.g. graduation ceremony).
- 3.19 In the event of a school consolidation/closure any residual school generated funds shall be proportionately distributed, based on student enrolment, to the affected schools.
- ~~3.20 School generated funds available in the reserve sub-ledger may be utilized towards public relation type expenditures as per the definition and maximum outlined in the current administrative procedures.~~
- 3.21 Liability and Insurance
- 3.21.1 The Board shall be protected against claims arising from the handling of school generated funds, through its crime insurance coverage, subject to the terms and conditions of the policy.
- 3.21.2 Staff and Principal-authorized volunteers shall utilize risk management practices that promote safety, accountability and due diligence in the handling and management of school generated funds in an effort to minimize related risks and exposure to liability.
- 3.22 The use of Board approved platforms for online payment is recommended for the collection of school generated funds. Schools should not receive funds from accounts set up through individual staff or volunteers where the payments have been processed by a non-Board approved payment processor or online website.
- 3.23 All funds collected must have an online payment option. Parents/Guardians will be provided with alternative methods of payment due to individual circumstances.
- 3.24 All funds generated at the school level shall be secured in the schools safe and shall be deposited into the appropriate school bank account on a regular basis, minimum weekly for secondary schools and bi-weekly for elementary schools, to prevent theft and loss of funds.
- 3.25 Accurate accounting shall be maintained by school administration to comply with the requirement of accountability for both the Principal and the school community. A summary of overall financial activity shall be provided to the Catholic School Council annually.
- 3.26 Accurate records and supporting documentation of daily transactions, including fees collection, deposits, reimbursements and payments, and regular reporting through the school level bank accounts are to be kept in the prescribed uniform format and subject to internal and external audit. The annual financial reports are

due to the Board by September 20th each year.

4. RESPONSIBILITIES

4.1 Director of Education

- 4.1.1 To oversee compliance with the School Generated Funds policy.
- 4.1.2 To determine progressive discipline action if policy breach is identified.

4.2 Superintendent of Education, School Leadership

- 4.2.1 To review, on an annual basis, the school bank account for each school.
- 4.2.2 To provide guidance to principals on what can be included as expenditures of school generated funds.
- 4.2.3 To act as a resource on any questions regarding interpretation of this policy.
- 4.2.4 To immediately report cases of non-compliance to the Director of Education.

4.3 Principal

- 4.3.1 To ensure that this policy is followed and that the school generated funds have a designated purpose that is consistent with the school Board's mission and values as well as the school improvement plan, and that the funds are used for their intended purposes. Activities will support student achievement and not detract from the learning environment.
- 4.3.2 To approve expenditures and the allocation of school generated funds.
- 4.3.3 To complete all documentation as outlined in the School Generated Funds Administrative Procedures.
- 4.3.4 To ensure that staff and authorized volunteers are aware of this Policy and related School Generated Funds Administrative Procedures.
- 4.3.5 To supervise the record keeping of all school generated revenues and expenditures that occur.
- 4.3.6 To ensure safe counting and storage of school generated funds, proper deposit procedures and appropriate reporting to the community.

4.4 Chief Financial Officer and Treasurer of the Board

- 4.4.1 To ensure adherence to all Administrative Procedures, Guidelines and Policies through yearly training and internal audits.

5. DEFINITIONS

5.1 Co-Curricular Activities

Co-Curricular special events or activities are extensions to the curriculum and not required for graduation. Examples include, but are not exclusive to: field trips, excursions, guest speakers, presentations, ceremonies, student awards and prizes, school team uniforms, sports competition expenses, and school clubs.

5.2 Core Curriculum

Core curriculum materials are learning materials that are required for completion of a unit of study or a high school course credit. These include items that are funded through the allocated budget of a school board including, but not limited to: textbooks, classroom bibles, workbooks, cahiers, resource materials, science supplies, lab materials kits, safety goggles. Classroom supplies are items used in the classroom to facilitate effective learning.

5.3 Facilities Renewal

Facilities renewal addresses the cost of repairing and renovating schools and are projects which would normally cost more than \$10,000 and convey a benefit over more than one year (i.e. extends the previously assessed useful life of the building structure and/or installed component/systems; decreases operating costs; increases building or system capacity and/or quality).

5.4 School Enhancement Requests

Permission to Enhance/improve a school facility using fundraising proceeds is granted per the YCDSB Form Admin. 56 School Supplementary Request Form and process as per the dollar limits outlined in the procedures.

5.5 Supplementary Materials

Materials required beyond those required for core curriculum as determined by the Ministry and the Principal in consultation with the Superintendent of Education, School Leadership.

Supplements may include:

- items that are not required as part of the regular day school program;
- items or activities that are non-essential or co-curricular in nature;
- a voluntary upgrade or substitute of a more costly material to the materials provided for course purposes;
- specialized optional programming (International Baccalaureate, Advanced Athletics, Regional Arts, ~~Laptop Learning~~ and any other board recognized specialized program);
- enhanced learning materials

6. CROSS REFERENCES

Legislation

[Education Act](#)

[Municipal Freedom of Information Protection of Privacy Act](#)

YCDSB Policies

YCDSB Policy 303 [School Organized and Continuing Education Excursions](#)

YCDSB Policy 312A [Textbooks, Program Enhancement Fees or Replacement of Materials Elementary](#)

YCDSB Policy 312B [Textbooks, Program Enhancement Fees or Replacement of Materials Secondary](#)

YCDSB Policy 423 [Conflict of Interest for Employees](#)

YCDSB Policy 606 [Catholic School Councils](#)

YCDSB Policy 608 [Volunteers in Schools](#)

YCDSB Policy 801 [Use of Board and School Funds for Recognition or Acknowledgement Purposes](#)

YCDSB Policy 808 [Travel, Meals and Expense Reimbursement](#)

YCDSB Procedures/Forms

YCDSB Procedure 803 [School Generated Funds](#)

YCDSB Registered Charity Program Guidelines

YCDSB Independent Procedure [School Enhancement Request](#)

YCDSB Independent Procedure [School Enhancement Request \(Competitive Bid Projects \\$10,000+\)](#)

YCDSB Form Admin. 86 Projected Fundraising for the School Year

YCDSB Form Admin. 86A School Fundraising Summary

YCDSB Form Admin. 86B Fundraising For External Charitable Purposes Summary
YCDSB Form Admin. 56 School ~~Supplementary~~ Enhancement Request Projects< \$10,000
YCDSB Form Admin. 56A School Enhancement Request Competitive Bid Requirement
Projects =/>>\$10,000
YCDSB Form Admin 106 Supplementary Course Materials and Activities Fees -Approval
Form for Elementary & Secondary

Canada Revenue Agency [List of Charities](#)

Approval by Board	May 25, 2021 <i>Date</i>
Effective Date	May 26, 2021 <i>Date</i>
Revision Date	May 25, 2021 <i>Date</i>
Review Date	May 2025 <i>Date</i>



YORK CATHOLIC DISTRICT SCHOOL BOARD

PROCEDURE

School Generated Funds

Addendum to Policy 803: School Generated Funds

Effective: **XX**

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1. INTRODUCTION

This document is intended to set out the definitions, guidelines, and procedures to be followed by York Catholic District School Board Schools ("Schools") in accordance with Policies:
YCDSB Policy 312A Textbooks, Program Enhancement Fees or Replacement of Materials-Elementary
YCDSB Policy 312B Textbooks, Program Enhancement Fees or Replacement of Materials-Secondary
YCDSB Policy 603A School Fundraising
YCDSB Policy 603B Fundraising for External Charitable Purposes
YCDSB Policy 801 Use of Board and School Funds for Recognition or Acknowledgement Purposes
YCDSB Policy 803 School Generated Funds
YCDSB Policy 808 Travel, Meals and Expense Reimbursement

2. ACCOUNTABILITY FRAMEWORK

- 2.1 Approvers are accountable for their decisions, which should be:
- Subject to good judgment and knowledge of the situation;
 - Exercised in appropriate circumstances; and
 - Comply with the principles and mandatory requirements set out in policy and the expense rules.
- 2.2 When a situation arises and discretion needs to be exercised, approvers should consider whether the request is:
- Able to stand up to scrutiny by the auditors and members of the public;
 - Properly explained and documented; and
 - Fair, equitable, reasonable and appropriate.
- 2.3 The Principal has the final approval for reimbursements from school generated funds following proper policies and administrative procedures as outlined. Consultation is available and conflicts would be resolved by the Superintendent of Education-School Leadership where required. Direct cross-referencing with the Purchasing Reference Guide and Approval Authority Schedule is mandatory.
- 2.4 Individuals who are seeking reimbursement from the school bank account shall not issue a cheque payable to themselves. Where a school has three or more school bank account signatories, reimbursement to a signatory, with the exception of reimbursement to the Principal, should be signed by the two other signatories who are not seeking reimbursement. In this case, the Principal is one of the two signatories. If a school has only two signatories, the reimbursement to a school bank account signatory must be done at the Board level using Admin 3, Expense Reimbursement (Non-Mileage) Form. Reimbursement to the Principal must be processed using Admin 3 form and approved by the Superintendent of Education.
- 2.5 In cases of contractual agreements of \$10,000 or more for a one-year period and for contractual agreements of any amount for more than a one-year period, the Principal must seek approval of the Superintendent of Education and Chief Financial Officer and Treasurer of the Board prior to the finalization of the contractual agreement. For procurement of \$10,000 or more, a minimum of three formal quotations must be obtained. For procurement requirements and contract signing authority, the Principal must ensure compliance with the Approval Authority Schedule.
- 2.6 The Superintendent of Education shall review **with the Principal** on an annual basis, the projected fundraising events of each school (Admin 86 ~~and Admin 86A and Admin 86B~~ form~~s~~) by October 31). **At the end of the school year (June 30th), the actual fundraising events should be reported on Admin 86A & 86B.** The completed forms should be maintained

in the Superintendent's department. **A copy of the Superintendent approved forms should be submitted to the School Finance Department.**

- 2.7 The Principal will ensure that staff completes the Enhanced/Supplementary Course Materials and Activities Fees Approval Form (Admin 106) when student fees are being proposed.

When authorizing the form, the Principal ensures that the proper fee amount is calculated (based on cost recovery) and that proper procedures are followed regarding the collection and deposit of funds.

- 2.8 The Principal will ensure there is communication to parents about a process to confidentially address financial hardship. Where the Principal (or designate) is satisfied that a financial hardship exists for a student or family, any student fee may be waived.
- 2.9 Consultation is recommended from the Board's insurance and risk management area for circumstances such as, but not limited to: extra-curricular activities, vehicle rentals, volunteer drivers, activity centre rentals, etc.
- 2.10 Income at the school level may meet the criteria for tax remittances depending on the circumstances surrounding the collection and the total taxable sales of the school. A branch designation assessment (<\$50,000 taxable sales) will be conducted during the internal audit process and may require that the school pay for any tax remittance requirements.
- 2.11 The Board has based these administrative procedures on the guidelines recommended by the Ontario Association of School Board Officials (Finance Committee). When clarification is necessary, OASBO detailed guidelines must be interpreted by the Board's **Accounting and Financial Services School Finance** Department **and should not be referred to directly by schools/volunteers.**
- 2.12 Food & Beverage Policy compliance letters for hot lunch or snack programs must be maintained on file for audit purposes.
- 2.13 Any funds and assets generated at the school level organized by the school or assisted by the Catholic School Council are the property of the Board.
- 2.14 In the event of a school consolidation/closure:
- 2.14.1 Any residual school generated funds shall be proportionately distributed, based on student enrolment, to the affected schools; and,
 - 2.14.2 Any assets purchased from the proceeds of fundraising events or activities by the school or assisted by the Catholic School Council shall be distributed equitably, based on a needs assessment completed by Board Staff:
 - 2.14.2.1 First, to the affected schools; and,
 - 2.14.2.2 Second, to other schools as identified by Board Staff.

3. ADMINISTRATIVE CONTROLS

3.1 BANK ACCOUNT AND RECORDS

- 3.1.1 Each school **may should** operate one external bank account for funds generated at a school. **~~with exceptions made to School Councils that have been approved to continue with a separate bank account.~~** Arrangements must be made so that the bank provides a month-end bank statement and copies of front and back of processed cheques. Cheque style SLF102 is compliant for printing with the Board's software for the school bank account. The Principal **should must** ensure that no staff members or members of the community are collecting and managing school funds in an unapproved separate bank account through an annual review

of the Policy 803 and Procedures with the school's staff members and members of the Catholic School Council at the beginning of the school year.

- 3.1.2 The Principal and School Bursar or Sr. School Secretary are the signatories on the bank account. It is recommended that a third party (Vice-Principal or designate) be set up as an alternative signature in the case of absences. Pre-signing of cheques is not acceptable; signature stamps are inappropriate to use when signing cheques. ~~Councils with separate bank accounts require three eligible signing officers whereby two always sign cheques (one always being the School Principal):~~
- 3.1.3 It is the responsibility of the School Principal to verify that all records are properly maintained and available for internal and/or external audit by fiscal year (September 1st to August 31st). School Bank account and Catholic School Council finance records must be maintained at the school for seven years (current year + 6 previous years).
- 3.1.4 When administrative staff, involved with school finances, relocates or terminates employment, the cheque signatories and the combination for the school safe need to be updated. The safe combination should be distributed to minimal staff members as determined by the Principal. When a Principal leaves a school, financial information should be shared with the incoming Principal to make him/her aware of the school's current financial balances and any forthcoming financial commitments. ~~A memo will be provided at the time of administration change with details of the school finances to be discussed.~~ The Principal Transition Financial Checklist should be completed by both the outgoing and incoming principals and a copy sent to the School Finance Department.
- 3.1.5 School Bank and Catholic School Council records and reports must be maintained on file based on fiscal year (September 1st to August 31st) as follows:
- School-Day Payment and Permission Forms maintained in electronic format. On an annual basis the prior year Payment and Permission Forms should be archived based on School Finance Department instructions.
 - Deposits: bank deposit slips with associated backup documentation attached (fund collector deposit forms with associated class list, including CSC deposit slips Admin 11), must be maintained in a binder in date order.
 - Direct Deposit Notices from Board: printouts from Accounting emailed to the school must be maintained in a separate section in the deposit binder in date order.
 - Cheques: original detailed receipts/invoices for expenses incurred must be maintained in a binder in school cheque number order, including CSC Cheque Requisitions (Admin 14/14A) and associated backup.
 - Electronic Payments to Board: printouts including Principal release reports must be maintained in a separate section in the cheque binder in date order.
 - ~~Deposits: bank deposit slips with associated backup documentation attached (fund collector deposit forms with associated class list, including CSC deposit slips Admin 11), must be maintained in a binder in date order.~~
 - ~~Direct Deposit Notices from Board: printouts from Accounting emailed to the school must be maintained in a separate section in the deposit binder in date order.~~
 - Transfers: transfer printouts and backup documentation including CSC Transfer Request Forms (Admin 15) and Principal's approval must be filed in a separate section of a binder in date order.
 - Reports: required monthly report printouts must be signed by the Principal and maintained in separate sections of a report binder in date order (Sub-ledger Summary, Imprest Release). Copies of regular and annual Catholic

- School Council Revenue & Expenditure Reports should be on file in a separate section in the report binder.
- Adjusting Entries: adjusting entry printouts are to be maintained in a separate section of a report binder in date order.
 - NSF: printouts and backup documentation pertaining to NSFs are to be maintained in a separate section of a report binder in date order.
 - Bank Reconciliation & bank statements processed cheques: monthly bank statements with a copy of the front and back of processed cheques are to be filed with the signed bank reconciliation printout in date order.
- 3.1.6 Monthly reports: Bank Reconciliation, Imprest Release, HST Report, Sub-ledger Summary and Sub-ledger Transfer reports must be printed by the Sr. School Secretary/Bursar and reviewed and signed by the School Principal on a monthly basis and maintained as indicated. By signing off on the monthly reports, the Principal acknowledges that a review has been completed and ~~he/she~~ **they** ~~certifies~~ **certify** that the information is correct. ~~Upon request by the Accounting and Financial Services Department, the signed monthly reports may be subjected to internal audit reviews.~~ The Principal Monthly Checklist should be completed fully by the Principal and a copy sent to the School Finance Department.
- 3.1.7 Upon request, the Sr. School Secretary/Bursar will provide
i) the **SAP** sub-ledger line item reports to the **Catholic** School Council for transactions pertaining to their funds and :
ii) **Cashless School Council transactions (student information redacted).**
- 3.1.8 Annual school bank account reports will be printed during the required year-end process on the system based on each year-end date of August 31st. The Revenue and Expenditure Report, Sub-ledger Summary Year End, copies of August bank statement and bank reconciliation are to be submitted to ~~the Accounting and Financial Services~~ **School Finance** Department before September 20th each year.
- 3.1.9 **Catholic** School Council is to submit their Annual Revenue vs Expenditure Report to ~~Accounting and Financial Services~~ **the School Finance** Department before September 20th each year. ~~Councils that maintain a separate bank account must send the Annual Revenue vs Expenditure Report, along with copies of the August bank statement and bank reconciliation.~~
- 3.1.10 It is the responsibility of the Sr. School Secretary/Bursar to maintain and categorize sub-ledger accounts in accordance with the sub-ledger account type definitions provided by the Board (refer to section 9). Separate sub-ledgers are required to track each type of collection and expenditure. Expenditures should correspond back to the sub-ledger containing the associated collections. A significant number of sub-ledgers are required in order to provide clear reporting (i.e. separate sub- ledger for each elementary excursion, separate sub-ledger for each field trip by secondary departments). Separate sub-ledgers are required to track Catholic School Council transactions separately from other school funds.
- 3.1.11 The school should provide the Board a detailed explanation for any sub-ledger balance carried forward from one fiscal year to the next (other than the reserve and imprest sub-ledgers) to ensure these balances have a purpose. Any sub- ledger with deficit balances at year-end should be investigated and dealt with appropriately.
- 3.1.12 The purpose of a reserve sub-ledger is to accumulate unspent, **undesignated** income and excess funds remaining in other sub-ledgers and to offset deficit balances in other sub- ledgers. Significant balances for student activities/resources should be investigated and dealt with appropriately (i.e.

refunds processed or excess funds applied to another activity involving the same students). Secondary Schools will require two reserve accounts; one for school reserve funds and one for student reserve funds to coincide with the student income/expenditures (refer to section 7). Student reserve funds ~~should be spent to benefit students directly. and student income may NOT be used to offset items listed as expenditures from school income.~~ Before year-end, compliant transfers are done from and to the appropriate reserve sub-ledgers to offset deficit balances or to clear balances remaining in specific sub-ledgers. Surplus funds remaining from Catholic School Council can either be distributed back to the Catholic School Council sub-ledger ~~or bank account~~ or left in the approved program sub-ledger until further direction is obtained from the Catholic School Council.

3.1.13 Transfers are required throughout the year in order to correct or balance specific sub-ledger transactions. On a monthly basis, the Principal shall sign off on the sub-ledger transfer report to approve all transfers. Before year-end, transfers are done in compliance with the school and student expenditures from/to the appropriate reserve sub-ledgers to offset deficit balances or to clear balances remaining in specific sub-ledgers. Catholic School Council funds solely maintained in the school bank account require that a “CSC transfer to School” (Admin 15) form be completed and authorized by Catholic School Council prior to movement of funds from the Catholic School Council sub-ledger into any other school sub-ledger.

3.1.14 Record-keeping and procedures for Catholic School Council funds maintained in the school bank account must follow the standard processes outlined by the Board (Appendix A). The procedures provide specific details regarding the process and roles for School Administration and Catholic School Council. ~~Councils that continue to maintain a separate bank account need to be compliant with the policies and procedures of the Board, including purchasing and record-keeping procedures outlined herein.~~

3.2 CASHLESS ONLINE PAYMENT (SCHOOL-DAY)

3.2.1 All funds collected must have an online payment option on the Board approved online payment platform. Parents/Guardians will be provided with alternative methods of payment due to individual circumstances.

3.2.2 Schools should not receive funds from accounts set up through individual staff or volunteers where the payments have been processed by a non-Board approved payment processor or online website.

3.3 CASH HANDLING (This moved to 3.4)

~~3.2.3 All funds collected at the school level (i.e. library book fair, enhancement fees, fundraising, hot lunch, etc.) must be counted on school premises in an appropriate area. With regards to volunteers, two or more persons are to be present during this process and with one volunteer initialling the collection list that they have counted the funds while the second volunteer is initialling the collection list that they have verified the funds counted. to initial on the collection list.~~

~~3.2.4 Funds collected must be safeguarded before submission to the office for the deposit process (locked cabinet or temporary storage in the school safe).~~

~~3.2.5 Fund collectors/counters will complete the Fund Collector Deposit Form (Admin 40) or Council Deposit Form (Admin 11), sign and submit the Form along with an associated class list and the funds to the school office for school bank account deposit processing.~~

- 3.2.6 — ~~Councils with funds in the school bank account, will insert the funds in the provided bank envelope or deposit bag with a copy of the Admin 11 attached on the outside of the envelope/bag. With regards to volunteers, two or more persons are to be present during this process and with one volunteer initialling the collection list that they have counted the funds while the second volunteer is initialling the collection list that they have verified the funds counted. The bag/envelope is sealed, delivered directly to the school office for storage in the school safe until the Sr. School Secretary/Bursar goes to the bank or the deposit is picked up.~~
- 3.2.7 — ~~Council funds are not re-counted by school staff; however, are delivered to the bank by the Sr. School Secretary/Bursar when bank deposit process occurs. Funds are not to be removed from the school by volunteers.~~
- 3.2.8 — ~~All funds (cash and cheques) received from the students or community must be deposited to the school bank account within the one week of receipt for secondary schools or within two weeks of receipt for elementary schools. School staff and volunteers are prohibited to spend cash that has been collected.~~

3.3 DEPOSITS

- 3.3.1 ~~For funds not collected through the online payment system, F~~ fund collectors will complete the Fund Collector Deposit Form (Admin 40), initial and submit with the funds to the school office for school bank account deposit processing along with an associated class list. Individuals collecting funds for ~~Catholic School~~ Council purposes will count/organize funds on school premises, complete and sign the ~~Catholic School~~ Council Deposit Form (Admin 11) and organize for deposit to the ~~Catholic School~~ Council sub- ledger account. These fund collector deposit forms must be kept intact as backup ~~to the deposits supporting the bank deposit amount taken to the bank made into the account for audit purposes and filed attached to the associated bank deposit slip.~~
- 3.3.2 It is recommended that the school office take a photocopy of all the completed deposit forms before placing the originals in the safe with the actual funds. These copies should be maintained separately as they will provide a means for corroborating the amount of funds not yet taken to the bank, which will be beneficial for insurance purposes should a theft occur.
- 3.3.3 ~~All fund collectors complete and authorize the appropriate fund counter/collector deposit forms (Admin 40 or Admin 11 for Council) and these are maintained by the school office as backup supporting the amount taken to the bank.~~
- 3.3.4 All funds ~~generated~~ collected at the school level shall be secured at the school's safe and shall be deposited into the appropriate school bank account on a regular basis, minimum weekly for secondary schools and bi-weekly for elementary schools, to prevent theft and loss of funds.
- 3.3.5 It is acknowledged and understood that monetary and/or gift-in-kind personal benefits are not allowed from Tour Operators. The only exception is for the travel, accommodation and meals included in the tour package for those individuals leading or chaperoning the program. In regards to cash for gratuities or other trip incidentals, the Tour Operator may need to make a cheque payable to the school for deposit into the school bank account. The school may issue these funds to the trip organizer (i.e. teacher in charge) who is then obliged to submit original detailed receipts to the school for expenses balancing to the amount provided. Reimbursement to the trip organizer should only be provided if receipts or a

reasonable alternative supporting documentation (e.g., transaction receipt from use of debit card or purchasing card statement) is made available to substantiate the expense.

- 3.3.6 Out of Classroom Activities Form (Admin 16) (or School-Day Attendance Lists) are to be collected ~~prior to the trip at the end of the school year from by the~~ administration in charge and maintained on file with school finance records for audit purposes. These will be utilized to compare the estimated collections with the actual deposits for excursions randomly selected for review.
- 3.3.7 Any funds collected from staff for social events, including staffroom vending machine commissions, may be maintained in the school bank account at the discretion of the Principal and spent on staff gatherings and should be recorded in a separate sub-ledger. The expenditures must not exceed the total funds collected; funds of this nature are not to be combined with other school funds. Staff social funds are not subject to audit.
- 3.3.8 The Library Book Fair deposit must balance to the official company worksheet completed by the Librarian that indicates the total sales minus electronic payments (credit card, debit, etc.). A copy of this worksheet is to be on file with the deposit as backup documentation along with the associated Admin ~~4440~~.
- 3.3.9 Electronic deposits ~~other than through Board Approved online payment system are only~~ permitted after pre-approval is received from the ~~Accounting and School Finance Services-Financial Services~~ Department ~~and Superintendent of Education for unique programs~~.

3.4 CASH HANDLING

- 3.4.1 All funds collected at the school level (i.e. library book fair, enhancement fees, fundraising, hot lunch, etc.) must be counted on school premises in an appropriate area. With regards to volunteers, two or more persons are to be present during this process ~~and with one volunteer initialling the collection list that they have counted the funds while the second volunteer is initialling the collection list that they have verified the funds counted. to initial on the collection list.~~
- 3.4.2 Funds collected must be safeguarded before submission to the office for the deposit process (locked cabinet or temporary storage in the school safe).
- 3.4.3 Fund collectors/counters will complete the Fund Collector Deposit Form (Admin 40) or ~~Catholic School~~ Council Deposit Form (Admin 11), sign and submit the Form along with an associated class list and the funds to the school office for school bank account deposit processing.
- 3.4.4 ~~Catholic School~~ Councils with funds in the school bank account, will insert the funds in the provided bank envelope or deposit bag with a copy of the Admin 11 attached on the outside of the envelope/bag. ~~With regards to volunteers, two or more persons are to be present during this process and with one volunteer initialling the collection list that they have counted the funds while the second volunteer is initialling the collection list that they have verified the funds counted.~~ The bag/envelope is sealed, delivered directly to the school office for storage in the school safe until the Sr. School Secretary/Bursar goes to the bank ~~or the deposit is picked up.~~
- 3.4.5 ~~Catholic School~~ Council funds are not re-counted by school staff; however, are delivered to the bank by the Sr. School Secretary/Bursar when ~~the~~ bank

deposit process occurs. Funds are not to be removed from the school by volunteers.

- 3.4.6 All funds (cash and cheques) received from the students or community must be deposited to the school bank account **within one week of receipt for secondary schools or within two weeks of receipt for elementary schools**. School staff and volunteers are prohibited to spend cash that has been collected.

3.5 **PAYMENTS/CHEQUES ISSUED**

- 3.5.1 All expenditures must be processed by cheque and backup documentation submitted (original detailed receipts/invoices - payments should not be made from company statements). In extenuating circumstances where the original documents are not available, an Admin 19B form (Exception Approval Form) must be on file for the missing or irregular documentation. This is to ensure that transactions are not paid in duplicate, are appropriate according to Board guidelines, and have an accurate audit trail.
- 3.5.2 **The principal should initial and date each invoice as “approved for payment” and confirm subledger coding prior to cheques being prepared as evidence of payment approval and correct subledger coding.**
- 3.5.3 Reimbursements to the General School Budget or central budgets are processed using the electronic payment transaction within SAP school banking. Input requires a reference to the purchase order/ or SAP document /or invoice #, vendor name, vendor# and a short description. The Principal is required to release the electronic payment on SAP before the transaction will be processed. Void EFT can only be done prior to **Accounting and Financial Services School Finance** processing.
- 3.5.4 It is inappropriate to fully pre-pay (with the exception for yearbook discounts) for an expense prior to receipt of goods or services.
- 3.5.5 If gift cards are purchased as prizes/honorariums/recognition purposes, the names of recipients must be shown on the receipt. Gift cards should not be purchased more than two weeks in advance of the event for which they are needed. The purchases should be made at the time required, not in advance without a specific purpose.
- 3.5.6 HST rebate is available for expenditures through the school bank account. The HST shown on the invoice/receipt is entered directly onto the cheque screen by the Sr. School Secretary/Bursar when the cheque is being issued. The HST rebate is calculated based on the information entered on the cheque screen. Regular reports to claim the rebate are generated and processed by the **Accounting and Financial Services-School Finance** Department. The rebates will be forwarded back to the school bank account by electronic funds transfer on a regular basis and deposited in the HST Rebate sub-ledger account. Funds are to be transferred to the Reserve sub-ledger account monthly. **Catholic School** Councils whose funds are solely maintained in the school bank account will also be eligible for HST rebates. The CSC HST Rebate will be deposited directly to an appropriate CSC sub-ledger account.
- 3.5.7 Individual Service Providers being paid \$500 or more from the school bank account will require an Admin 118 form to be completed through the school office and submitted to the Accounting **and Financial Services** Department within the specified period indicated on the form for T4A reporting purpose. **Policy 423**

Conflict of Interest ~~for Employees~~ policy should be reviewed prior to engagement of Individual Service Providers.

3.5.8 ~~Individual service providers who are employees of the Board must be paid through payroll to ensure appropriate mandatory deductions are applied. A reimbursement from school funds to the Board can be processed to offset the cost if appropriate.~~

3.5.9 Employees seeking reimbursement for use of personal vehicle for work purposes must submit ~~an Admin 3—Expense Reimbursement form~~ expenses through TRIP available through the Employee Portal. Schools are not to directly reimburse for gas fill-ups on personal vehicles.

3.5.10 The supporting documentation for the Library Book Fair cheque issued is to include the official company worksheet completed by the Librarian to ensure calculation of payment required is correct.

3.5.11 ~~Invoices requiring eElectronic payments are permitted after consultation and pre-approval is obtained from the Accounting and Financial Services should be approved and forwarded to the School Finance Department for processing. and the Superintendent of Education for unique programs.~~

3.6 APPROPRIATE USES FOR SCHOOL GENERATED FUNDS

3.6.1 ~~Extracurricular activities and events can be offset with school generated fund proceeds. Examples include: field trips, excursions, guest speakers, presentations, ceremonies, student awards and prizes, school team uniforms, sports competition expenses, and school clubs.~~

3.6.2 Certain types of purchases (e.g. computers, equipment, facility changes, etc.) are to be processed through Purchasing Services, Information Systems and/or the Plant Department in order to ensure compliance with all Board Policies including proper authorization and vendor selection prior to initiating the purchase.

3.6.3 School generated funds may be used to contribute towards school renovations or facility upgrades/changes that do not increase the student capacity of the school. School renovations or facility upgrades/changes instigated by the school must be authorized in advance by the Superintendent of Education and Plant Department utilizing a Work Order or the School Enhancement Request Forms (Admin 56/56A). These forms must be retained at the school for records and audit purposes. Breaches of this parameter will be subject to progressive discipline.

3.6.4 School generated funds can be used to subsidize the General School Budget ~~for items listed in Section 4.1 and 5.1 only in reference to appropriate finalized expenditures. Reference to~~ The SAP document number, purchase orders and/or invoices that are being subsidized must be ~~referenced referred to~~ as backup for school bank account records and submitted with the electronic payment to the ~~Accounting and Financial Services~~ School Finance Department.

3.6.5 School Generated Funds can be utilized for technology investments which complement programs. ~~The~~ Information Systems Department must be consulted in writing to ensure compatibility with Board equipment. The processing of a purchase order for purchases or direct consultation from the Purchasing Department is required. Communications with the Information Systems Department must be retained at the school for records and audit purposes.

~~3.6.6 Extracurricular activities and events can be offset with school generated funds proceeds. Examples include: field trips, excursions, guest speakers, presentations, ceremonies, student awards and prizes, school team uniforms, sports competition expenses, and school clubs.~~

~~3.6.7 School Generated Funds may not be utilized towards core curriculum materials as defined in Policy 312A&B Textbooks, Program Enhancement Fees or Replacement of Materials Elementary and Secondary.~~

4. ELEMENTARY CONTROLS

4.1 Elementary income must be spent on items that directly benefit the students, such as:

- Non-mandatory professional drama performances
- Supplemental library books/reference material
- Supplemental classroom/lab computers (student use)
- School events and extra-curricular activities, including school sporting events, clubs, concerts, etc.
- Field trips, excursions, supplemental educational programs
- Enhanced/supplementary classroom materials
- School beautification (peace gardens, hallway murals, etc.)

4.2 Elementary income must NOT be spent on the following:

- Core-curriculum materials (textbooks, workbooks, etc.)
- Computers or furniture/equipment for the office
- Staff meeting refreshments (please use GSB: Pcard or Imprest)
- Office supplies, business cards
- Gifts for staff members
- Equipment or supplies for the staff room
- Staff development/conferences

4.3 The following considerations may be made with separate sub-ledgers available in order to track these expenditures for audit purposes:

4.3.1 ~~Public Relations: Purchases that provide items or refreshments for parent/community meetings, and for promoting rewarding relationships with community partnerships, suppliers and volunteers in accordance with Policy #801. Annual maximum expenditure: \$1 per ADE student enrolment as at the Oct 31st of the current school year (minimum of \$300 per location). All receipts must be retained for records and audit purposes. Name of recipient must be written on the receipt and retained in the audit binder. For exclusions please refer to Policy 801.~~

4.3.2 Extra-curricular Funds: (Sports Teams, Clubs, Student Council, etc.) There shall be no collections in excess of projected expenditures. Refunds should be considered where large surpluses remain. Deficits for any category must be subsidized by reserve funds by processing transfers before year-end.

4.3.3 Enhancement/Supplementary Fees and Field Trips/Excursions: Voluntary fees, calculated at cost-recovery and pre-approved by the Principal (Admin. 16 or 106 forms), are to be communicated to students/parents as soon as possible. Refunds should be considered where large surpluses remain. Deficits for any category must be subsidized by reserve funds by processing

transfers before year-end.

- 4.3.4 Recognition or Acknowledgement purposes: For purchases in accordance with Policy 801 Use of Board and School Funds for Recognition or Acknowledgement Purposes. Examples include bereavement, honoraria, or recognition for an honour or accomplishment to a staff member or student(s). The value of any single individual recognition or acknowledgement shall not exceed one hundred dollars (\$100). Name of the recipient must be written on the receipt and retained in the audit binder. For exclusions please refer to Policy 801.
- 4.3.5 Catholic School Council and other contributions: These funds are allocated to the school for specific purposes and shall only be spent as intended. **Catholic School** Council funds maintained in the school bank account must adhere to the Board standards, procedures and forms recommended for this process.

5. SECONDARY CONTROLS

- 5.1 Secondary income must be spent on items that directly benefit the students, such as:
- Non-mandatory professional drama performances
 - Supplemental library books/reference material
 - Supplemental classroom/lab computers (student use)
 - School events and extra-curricular activities, including school sporting events, clubs, concerts, etc.
 - Field trips, excursions, supplemental educational programs
 - Enhanced/supplementary classroom materials
 - School beautification (peace gardens, hallway murals, etc.)
- 5.2 Secondary income must NOT be spent on the following:
- Core-curriculum materials (textbooks, workbooks, etc.)
 - Computers or furniture/equipment for the office
 - Staff meeting refreshments (please use GSB: Pcard or Imprest)
 - Office supplies, business cards
 - Gifts for staff members
 - Equipment or supplies for the staff room
 - Staff development/conferences
- 5.3 Income at the secondary school level is defined as “School” or “Student”.
- 5.3.1 School income is defined as income that arises from services provided to the school: Bank Interest, HST Rebate, Photographer’s Commission, Uniform Commission, Cafeteria Commission, Vending Machine Commission.
- 5.3.2 Student income is defined as income derived directly by or from the students: Student Activity Fees (SAF), Enhanced/supplementary Course Materials fees, Excursion funds, Extra-curricular funds (team sports, clubs, etc.), Student Councils funds, Fundraising, ~~Student parking fees.~~
- 5.4 Secondary “School” income may be spent in the following areas with separate sub- ledgers available in order to track these expenditures for audit purposes:
- ~~5.4.1 Public Relations: For purchases in accordance with Policy 801 Use of Board and School Funds for Recognition or Acknowledgement Purposes. Examples include items or events for school community~~

~~meetings, promote rewarding relationships with community partners, suppliers and volunteers in accordance with Policy 801. Annual maximum expenditure: \$6.00 per student average daily enrolment as at the October 31st of the current school year. All receipts must be retained for records and audit purposes. Name of recipient must be written on the receipt and retained in the audit binder. For exclusions please refer to Policy 801.~~

- 5.4.2 Staff Professional Development: Professional Development for staff (excluding Principal and Vice Principals) to attend in-services and conferences to enhance their profession (includes PA Day expenditures). Annual maximum expenditure: \$50 per the staff full-time equivalent as at Oct 31st of the current school year. ~~Excluded from the maximum: Special programs (i.e., International Baccalaureate) that require particular teacher training from other fees collected.~~
- 5.4.3 Special programs (e.g. International Baccalaureate) where funds are specifically collected for teacher training are exempt from the staff development limitations identified in above.
- 5.4.4 Staff Retreats/Faith Day: Purchases to involve staff in the religious aspects of school life (includes staff faith day expenditures). Annual maximum expenditure: \$30 per the staff full-time equivalent as at Oct 31st of the current school year.
- 5.4.5 ~~Purchase for~~ Recognition or Acknowledgement Purposes ~~for purchase should be~~ in accordance with Policy 801 Use of Board and School Funds for Recognition or Acknowledgement Purposes. Examples include bereavement, honoraria, or recognition for an honour or accomplishment to a staff member or student(s). The value of any single individual recognition or acknowledgement shall not exceed one hundred dollars (\$100). Name of the recipient must be written on the receipt and retained in the audit binder. For exclusions please refer to Policy 801.

5.5 Secondary 'Student' income must be spent on items that directly benefit the students.

5.5.1 Student Activity Fees (SAF): The current amount and intended allocation of the school's student activity fee shall be communicated to the school community. Sample format:

Student Leadership	\$20
Wellness and Inclusivity	\$20
Catholic School Council Contribution	\$10
Total	\$50
Enrolment of 1200 x SAF \$90 = \$108,000	
Yearbook	\$40 x 1200 = 48,000
Student Agenda	\$10 x 1200 = 12,000
Student Recognition	\$3 x 1200 = 3,600
Student Council	\$2 x 1200 = 2,400
Team Sports	\$20 x 1200 = 24,000
Theme/School Spirit	\$5 x 1200 = 6,000
Student Clubs	\$10 x 1200 = 12,000

5.5.2 Enhancement/Supplementary Fees and Field Trips/Excursions: Voluntary fees, calculated at recovery of cost only and pre-approved by the Principal (Admin 16 or 106 forms), are to be

communicated, where possible, to students/parents during the course selection process. Refunds should be considered where large surpluses remain. Deficits for any category must be subsidized by student or school reserve funds by processing transfers before year-end. The specific approvals for enhancement fee collections are finalized by individual School Principals with consultation from the Superintendents of Education when necessary.

- 5.5.3 Other Collections: When fees are collected from students for other items (i.e. photocopying, library fines, computer printing etc.), the charge shall be cost recovery only. The fees collected must be accounted for and deposited to the school bank account, with appropriate backup documentation, through the ~~Sr. School Secretary~~/Bursar; cheques are issued for expenditures.
- 5.5.4 Extra-curricular Funds: (Sports Teams, Clubs, Student Council, etc.) There shall be no collections in excess of projected expenditures. Refunds should be considered where large surpluses remain. Deficits for any category must be subsidized by student or school reserve funds by processing transfers before year-end.
- 5.5.5 Catholic School Council and other contributions: These funds are allocated to the school for specific purposes and shall only be spent as intended. ~~Catholic School~~ Council funds maintained in the school bank account must adhere to the Board standards, procedures and forms recommended for this process. If a Catholic School Council wishes to solicit a set amount per student in lieu of other fundraising, they can choose to have that amount included in the Student Activity Fee. It must be clearly delineated from the Student Activity Fee and clearly indicated as "Voluntary Contribution to Catholic School Council Fundraising".

6. FUNDRAISING ADMINISTRATIVE CONTROLS

- 6.1 Refer to all parameters and responsibilities in Policy 603A School Fundraising.
- 6.2 Authorization for a major fund raising activity ~~from a Superintendent~~ must be obtained before the event takes place (Projected Fundraising Admin 86). Fundraising money should only be spent on items that directly benefit the students for the purchase of enhanced/supplementary supplies, equipment or services that are not funded specifically through school/board budgets.
- 6.3 Participation in fundraising activities is voluntary for staff and students.
- 6.4 Proceeds from school and ~~Catholic School~~ Council fundraising activities shall be used equitably among the student body.
- 6.5 There shall be no more than two major fundraisers per school per year. A major fundraiser involves the majority of the student body and is expected to raise at least an average of \$10 per student. Hot lunch, snack and milk programs are subject to the policy and procedures, but do not count as major fundraisers.
- 6.6 It is understood that spontaneous unplanned minor fundraising projects may occur at given times during the school year (e.g. specific grade/divisional projects or events).

- 6.7 The Principal may allow minor fundraising events, including topics that relate to curriculum, within the school or a classroom providing it is understood that it is a voluntary effort, without any undue pressure on any student/parent/guardian to contribute or participate.
- 6.8 **Catholic School** Council fundraising proceeds can be used to purchase recognition/ acknowledgements for school community members; maximum \$100 for any single recognition gift. ~~Staff cannot be directly paid honorariums; gifts or gift cards are recommended in these cases. Recipient's name(s) must be written on the gift card receipts/invoices and must be retained for records and audit purposes.~~ Refer to Policy 801 Use of Board and School Funds for Recognition or Acknowledgement Purposes (maximum of \$100) and if the recognition/acknowledgement is in the form of meals refer to Policy 808 Travel, Meals & Expense Reimbursement for specific parameters.
- 6.9 Fundraising proceeds may not be utilized towards core-curriculum materials. These include, but are not limited to: textbooks, workbooks, cahiers, bibles, science supplies, lab material kits, safety goggles, and staff development costs.
- ~~6.10 Refer to all parameters, responsibilities and definitions in the School Fundraising policy #603A.~~
- 6.11 Fundraising proceeds should be spent during the school year in which they are raised. ~~Fundraising proceeds with a designated purpose must remain in the appropriate subledger to ensure that the funds are spent on the designated purpose.~~ A Special Project Reserve sub-ledger can be setup for long term fundraising goals and these amounts need to be specially noted on year-end financial reports. Otherwise, as a guideline, no more than 10% of a school's net fundraising proceeds should be carried forward to the following school year. For **Catholic School** Council, it is prudent to carry forward \$1,000 to cover any startup costs for the following year.
- 6.12 In exceptional circumstances (i.e. strike lockout, pandemic shutdown) where funds cannot be full expended as planned, schools can carry forward the fundraising proceeds to be used in subsequent years with the Catholic School Council and principal's approvals. Schools should use the funds for the purpose that it was raised (e.g. graduation ceremony).
- 6.13 The Principal will complete and submit the Admin 86A School Fundraising Summary for all planned fundraising initiatives and hot lunch, snack or milk programs to the Superintendent of Education by October 31.
- 6.14 Communication of fundraising activities and finances must be posted in newsletters and/or on the school website ~~annually regularly (i.e. December 31 and June 30).~~

7. FUNDRAISING FOR EXTERNAL CHARITABLE PURPOSES

- 7.1 ~~Refer to all parameters and responsibilities in Policy 603B Fundraising for External Charitable Purposes.~~
- 7.2 Contributions accepted through the schools that will be forwarded to external charitable organizations are to be organized through the school bank account (these are not processed through the Board's registered charity program).
- 7.3 There shall be no more than two major fundraisers for external charities per

school per year. A major fundraiser involves the majority of the student body and is expected to raise at least an average of \$10 per student.

- 7.4 Minor charitable fundraisers organized by classrooms or student groups should be spaced out and limited in scope so that the school is not constantly fundraising. Consideration should be given to having these charitable drives be non-monetary in nature or limited to 'loonie' or 'toonie' drives.
- 7.5 Collections for contributions are to be submitted to external charities that are registered through Canada Revenue Agency (CRA). A list of registered charities can be obtained through www.cra-arc.gc.ca/charities.
- 7.6 Activities to raise funds that do not support a CRA registered charity require approval from the Superintendent of Education ($\leq \$1,000$) or Director of Education ($> \$1,000$). Examples include raising funds for local families requiring support in tragic situations. An email or written authorization must be on file with the school banking records for audit purposes. This is not applicable for gift-in-kind (goods contributed) collections.
- ~~7.7 The school is encouraged to support Catholic charitable groups. Monies raised from other fundraising events may be allocated to a charitable group.~~
- 7.8 Collections that are made specifically for an external charity must be forwarded by cheque directly to the appropriate charity name prior to the end of the fiscal year (August 31st) of which the event occurs. In cases where funds are collected and sent to the Board to allow for one central payment, funds are to be remitted to the CEC within one week of the end of the fundraiser.
- ~~7.9 Refer to all parameters and responsibilities in Policy 603B Fundraising for External Charitable Purposes.~~
- 7.10 The Principal will complete and submit the Admin 86B Fundraising for External Charitable Purposes for all external charitable initiatives to the Superintendent of Education and the School Finance Department by ~~October 31~~ June 30th.

8. STUDENT FEES ADMINISTRATIVE CONTROLS

- 8.1 Principals shall pre-authorize all fee collections in the school pertaining supplementary materials/activities used in the classroom (Admin 106 – Enhanced Materials/Activities Fees Approval) and excursions/field trips (Admin 16 – Out of Classroom Activities Approval).
- 8.2 The Principal will provide leadership and guidance to the staff in determining the extent to which pupils should be asked to supplement supplies.
- 8.3 All student fees are voluntary and are collected in an amount equal to or less than the direct cost of goods or services being offered.
- 8.4 All fees collected shall only be spent for what they were intended.

- 8.5 Schools will not be permitted to charge a late fee when collecting any type of enhancement/supplementary or student activity fee.
- 8.6 Fees are not to be collected from students to cover core curriculum materials that are funded through the allocated budget of the Board. These include, but are not limited to: textbooks, workbooks, cahiers, bibles, science supplies, lab material kits, safety goggles, and staff development costs.
- 8.7 Fees to cover sports teams, extra-curricular clubs, excursions, retreats, field trips are permitted. ~~It is up to the individual Principal how approval is obtained to initiate a fee collection for extra-curricular activities.~~
- 8.8 Student Activity Fees are voluntary amounts collected from the student to supplement the school experience and can include costs for ~~yearbooks, student agendas, student recognition programs,~~ extracurricular activities, school spirit events, student clubs and teams.
- 8.9 Maximum Student Activity Fee: ~~\$100~~50 per school year per student.
- 8.10 Fees for Student Retreats must not be included directly in the Student Activity Fee, but may be collected at the same time. ~~Requesting a separate cheque from parents is encouraged so that the deposit can be posted directly into the proper retreat sub-ledger account.~~ Funds should be collected using the Board Approved Online Payment System.
- 8.11 Non-payment of the Student Activity Fee shall in no way delay or jeopardize a student's registration or course selection process.
- 8.12 Student Activity Fee refund amounts due to registration cancellation shall be dependent upon the date of cancellation and costs already incurred.
- 8.13 Students shall not be charged for parking fees.

9. ~~SECONDARY CONTROLS~~ (moved up to 5)

- ~~9.1 Income at the secondary school level is defined as "School" or "Student".~~
- ~~9.1.1 School income is defined as income that arises from services provided to the school: Bank Interest, HST Rebate, Photographer's Commission, Uniform Commission, Cafeteria Commission, Vending Machine Commission.~~
- ~~9.1.2 Student income is defined as income derived directly by or from the students: Student Activity Fees (SAF), Enhanced/supplementary Course Materials fees, Excursion funds, Extra-curricular funds (team sports, clubs, etc.), Student Councils funds, Fundraising, **Student parking fees.**~~
- ~~9.2 Secondary "School" income may be spent in the following areas with separate sub-ledgers available in order to track these expenditures for audit purposes:~~
- ~~9.2.1 Public Relations: For purchases in accordance with Policy 801 Use of Board and School Funds for Recognition or Acknowledgement Purposes. Examples include items or events for school community meetings, promote rewarding relationships with community~~

partners, suppliers and volunteers in accordance with Policy 801.
~~Annual maximum expenditure: \$6.00 per student average daily enrolment as at the October 31st of the current school year. All receipts must be retained for records and audit purposes. Name of recipient must be written on the receipt and retained in the audit binder. For exclusions please refer to Policy 801.~~

9.2.2 ~~Staff Professional Development: Professional Development for staff (excluding Principal and Vice Principals) to attend in services and conferences to enhance their profession (includes PA Day expenditures). Annual maximum expenditure: \$50 per the staff full time equivalent as at Oct 31st of the current school year. Excluded from the maximum: Special programs (i.e., International Baccalaureate) that require particular teacher training from other fees collected.~~

9.2.3 ~~Special programs (e.g. International Baccalaureate) where funds are specifically collected for teacher training are exempt from the staff development limitations identified in above~~

9.2.4 ~~Staff Retreats/Faith Day: Purchases to involve staff in the religious aspects of school life (includes staff faith day expenditures). Annual maximum expenditure: \$30 per the staff full time equivalent as at Oct 31st of the current school year.~~

9.2.5 ~~Purchase for Recognition or Acknowledgement Purposes for purchase should be in accordance with Policy 801 Use of Board and School Funds for Recognition or Acknowledgement Purposes. Examples include bereavement, honoraria, or recognition for an honour or accomplishment to a staff member or student(s). The value of any single individual recognition or acknowledgement shall not exceed one hundred dollars (\$100). Name of the recipient must be written on the receipt and retained in the audit binder. For exclusions please refer to Policy 801.~~

9.3 ~~Secondary 'Student' income must be spent on items that directly benefit the students.~~

9.3.1 ~~Student Activity Fees (SAF): The current amount and intended allocation of the school's student activity fee shall be communicated to the school community. Sample format:~~

Student Leadership	\$20
Wellness and Inclusivity	\$20
Catholic School Council Contribution	\$10
Total	\$50

~~Enrolment of 1200 x SAF \$90 = \$108,000~~

Yearbook	\$40	x	1200	=	48,000
Student Agenda	\$10	x	1200	=	12,000
Student Recognition	\$3	x	1200	=	3,600
Student Council	\$2	x	1200	=	2,400
Team Sports	\$20	x	1200	=	24,000
Theme/School Spirit	\$5	x	1200	=	6,000
Student Clubs	\$10	x	1200	=	12,000

9.3.2 ~~Enhancement/Supplementary Fees and Field Trips/Excursions: Voluntary fees, calculated at recovery of cost only and pre-approved by the Principal (Admin 16 or 106 forms), are to be communicated, where possible, to students/parents during the~~

course selection process. Refunds should be considered where large surpluses remain. Deficits for any category must be subsidized by student or school reserve funds by processing transfers before year-end. The specific approvals for enhancement fee collections are finalized by individual School Principals with consultation from the Superintendents of Education when necessary.

~~9.3.3 Other Collections: When fees are collected from students for other items (i.e. photocopying, library fines, computer printing etc.), the charge shall be cost recovery only. The fees collected must be accounted for and deposited to the school bank account, with appropriate backup documentation, through the Sr. School Secretary/Bursar; cheques are issued for expenditures.~~

~~9.3.4 Extra-curricular Funds: (Sports Teams, Clubs, Student Council, etc.) There shall be no collections in excess of projected expenditures. Refunds should be considered where large surpluses remain. Deficits for any category must be subsidized by student or school reserve funds by processing transfers before year-end.~~

~~9.3.5 Catholic School Council and other contributions: These funds are allocated to the school for specific purposes and shall only be spent as intended. Council funds maintained in the school bank account must adhere to the Board standards, procedures and forms recommended for this process. If a Catholic School Council wishes to solicit a set amount per student in lieu of other fundraising, they can choose to have that amount included in the Student Activity Fee. It must be clearly delineated from the Student Activity Fee and clearly indicated as "Voluntary Contribution to Catholic School Council Fundraising".~~

~~9.3.6 Special programs (e.g. International Baccalaureate) where funds are specifically collected for teacher training are exempt from the staff development limitations identified in 7.2.2~~

~~10. ELEMENTARY CONTROLS (moved up to 4)~~

~~8.1.2 Elementary income must be spent on items that directly benefit the students, such as:~~

- ~~● Non-mandatory professional drama performances~~
- ~~● Supplemental library books/reference material~~
- ~~● Supplemental classroom/lab computers (student use)~~
- ~~● School events and extra-curricular activities, including school sporting events, clubs, concerts, etc.~~
- ~~● Field trips, excursions, supplemental educational programs~~
- ~~● Enhanced/supplementary classroom materials~~
- ~~● School beautification (peace gardens, hallway murals, etc.)~~

~~8.2 Elementary income must NOT be spent on the following:~~

- ~~● Core curriculum materials (textbooks, workbooks, etc.)~~
- ~~● Computers or furniture/equipment for the office~~
- ~~● Staff meeting refreshments (please use GSB: Peard or Imprest)~~
- ~~● Office supplies, business cards~~
- ~~● Gifts for staff members~~

- Equipment or supplies for the staff room
- Staff development/conferences

8.3 The following considerations may be made with separate sub-ledgers available in order to track these expenditures for audit purposes:

~~8.3.1 Public Relations: Purchases that provide items or refreshments for parent/community meetings, and for promoting rewarding relationships with community partnerships, suppliers and volunteers in accordance with Policy #801. Annual maximum expenditure: \$1 per ADE student enrolment as at the Oct 31st of the current school year (minimum of \$300 per location). All receipts must be retained for records and audit purposes. Name of recipient must be written on the receipt and retained in the audit binder. For exclusions please refer to Policy 801.~~

8.3.2 Extra-curricular Funds: (Sports Teams, Clubs, Student Council, etc.) There shall be no collections in excess of projected expenditures.

Refunds should be considered where large surpluses remain. Deficits for any category must be subsidized by reserve funds by processing transfers before year-end

8.3.3 Enhancement/Supplementary Fees and Field Trips/Excursions: Voluntary fees, calculated at cost recovery and pre-approved by the Principal (Admin. 16 or 106 forms), are to be communicated to students/parents as soon as possible. Refunds should be considered where large surpluses remain. Deficits for any category must be subsidized by reserve funds by processing transfers before year-end.

8.3.4 Recognition or Acknowledgement purposes: For purchases in accordance with Policy 801 Use of Board and School Funds for Recognition or Acknowledgement Purposes. Examples include bereavement, honoraria, or recognition for an honour or accomplishment to a staff member or student(s). The value of any single individual recognition or acknowledgement shall not exceed one hundred dollars (\$100). Name of the recipient must be written on the receipt and retained in the audit binder. For exclusions please refer to Policy 801.

8.3.5 Catholic School Council and other contributions: These funds are allocated to the school for specific purposes and shall only be spent as intended. Council funds maintained in the school bank account must adhere to the Board standards, procedures and forms recommended for this process.

9. SUB-LEDGER ACCOUNT TYPE DEFINITIONS

SUB-LEDGER ACCOUNT TYPE	DEFINITION	SUB-LEDGER EXAMPLES
Banking	Bank Interest and Bank Account Service Charges/account fees, Cashless fees . Cost of cheques for bank account.	Bank Interest, Bank Service Charges, GIC , Cashless fees
Excursions/Field Trips	All revenue & expenditures for excursions and field trips. Expenses include transportation, admissions, accommodations & other directly related expenditures. Any surplus or deficit should be balanced to zero before year-end (August 31st) by transferring funds to or from the Reserve sub-ledger. Substantial over-collections must be investigated to determine if student refunds are required. Each excursion is to be recorded in a separate sub-ledger.	Individual Excursions (e.g. Toronto Zoo, ROM, etc.) Band Trip, Specific Secondary Subject Trips, Quebec Trip, Ottawa Trip
External Charities	Direct in/out transactions for external charities raised by students, staff or school community. Transactions are to be deposited to the sub-ledger, then a cheque issued directly to the charitable institution within the same school year (before August 31st).	Terry Fox Run, ShareLife, Heart & Stroke
Fundraising	Revenue & expenditures for products sold or activities that are intended to generate profits and be beneficial to the entire school rather than a specific club or department. At year-end (August 31st), transfers should be performed to place the remaining funds in the Student Reserve sub-ledger.	Library Book Fair, Spirit Day, Fundraisers not organized by School Council, non-Council Hot Lunch, milk or snack programs, Brd Reg Charity offsets
Other	Other financial activities that are not covered under the above categories/types and are not directly student-related activities.	HST Rebate, Cafeteria Commission, Photo Commission, Public Relations, Recognition, Recycling Rebate, Vending Machine Commission, Staff Social, General contribution to the school (no income tax receipt)
Catholic School Council	All revenue & expenditures generated by the Catholic School Council. Note: This does NOT include external charities as defined below .	Council operated activities: Hot Lunch, Milk Program, Council Fundraisers, Council BBQ
Sports Teams (Secondary Only)	Revenue & expenditures for student extra-curricular team sports. These should have their own source of revenue or are provided with a portion of the student activity fees. It is the Principal's responsibility to determine if surplus funds are to remain in the sub-ledger or are to be transferred to Student Reserve at year-end. A deficit balance is not allowed in this type of sub-ledger, therefore a transfer from reserve	Individual Team Sports, Team Sports Operate, Athletic Fee, Athletic Banquet

	funds should cover any deficits before year-end (August 31st). Substantial over-collections must be investigated to determine if student refunds are required.	
Student Activity Fees (Secondary Only)	Voluntary Revenue collected at registration for Student Activity Fees (SAF). No cheques for expenses are issued directly from a Student Activity Fee sub-ledger (with the exception of student refunds); transfers are performed to other sub-ledgers for spending as per school newsletter publication. Before year-end any balance remaining of SAFs need to be transferred to Student Reserve.	SAF 2019/20 2023-24, SAF 2020/21 2024-25, etc.
Student Council/Gov't	Revenue & expenditures generated by student committees operated at the school. Either their own source of revenue or allocation of SAF. Usually surplus funds are to remain in the sub-ledger at year-end. A deficit balance is not allowed in this type of sub-ledger, therefore reserve funds should offset any deficits. Note: this does not include external charities as defined below.	Student council, athletic council, yearbook committee, arts council
Student Res/Activities	All revenue & expenditures for student resources or activities such as: course enhancement fees for individual subjects, specific clubs, student resources that either have their own source of revenue or are provided with a portion of the student activity fees. It is the Principal's responsibility to determine if surplus funds are to remain in the sub-ledger or are to be transferred to Student Reserve at year-end. A deficit balance is not allowed in this type of sub-ledger, therefore a transfer from reserve funds should cover any deficits before year-end (August 31st). Substantial over-collections must be investigated to determine if student refunds are required.	Misc. Student Expenditures, Misc. School Expenditures, Dept. sub-ledgers for Course Enhancement Fees, Lost Textbooks, Liturgies, Student Parking , Student Handbooks/Agendas, Awards, Graduation, Prom, Fashion Show, Plays, Clubs, Elementary Sports, Newspaper, Locks, Author Presentations, Performances, Yearbook, School BBQ (non-Council)

10. CROSS REFERENCES

There are other policies, procedures and guidelines that have been established and are cross-referenced in the policies related to this administrative procedure.

Other Related Policies:

YCDSB Policy 423 [Conflict of Interest for Employees](#)

YCDSB Policy 606 [Catholic School Councils](#)

YCDSB Policy 801 [Use of Board and School Funds for Recognition or Acknowledgement](#)

YCDSB Policy 802 [Purchasing, Lease & Rental of Goods & Services](#)

Guidelines, Procedures and Forms:

Admin 3 Expense Reimbursements

Admin 11 CSC Deposit

Admin 14 CSC Cheque Request

Admin 14a CSC Cheque Request Blanket

Admin 15 CSC Transfer to School

Admin 16 et al – School Organized and Continuing Education Excursions, Approval & related forms

Admin 19B Exception Approval Form

Admin 40 School Fund Collector Deposit

Form Admin 56 School

Enhancement Request

Admin 71 Interschool Athletic Participation Form

Admin 72 Informed Consent/Permission Form For Sports Teams

Admin 77 Annual Sports Team Request Form

Admin 78 Athletic Fee

Admin 86 Projected Fundraising

Admin 86A School Fundraising Summary

Admin 86B Fundraising for External Charitable Purposes Summary

Admin 106 Supplementary Course Materials and Activities Fees Approval Form for Elementary & Secondary

Admin 118 Individual Service Providers paid through School Generated Funds

Purchasing Card Procedure

Purchasing Reference Guide

Registered Charity Guidelines and forms

Travel, Meals and Expense Reimbursement Guidelines

YCDSB Approval Authority Schedule

Catholic School Council Funds Posted in the School Bank Account

Catholic School Council (CSC) Procedures

~~The Council no longer maintains a separate bank account (exceptions to this include only those School Councils that have not yet moved their funds into the school bank account);~~ All Catholic School Council (the "Council") funds are maintained in the school's bank account for recording/reporting purposes. Separate sub-ledgers will be set up on the system to track Council transactions separately from other school funds. Council should ensure that the standard blank forms, as outlined below, should be copied onto green paper and a supply of the forms made accessible for Council members.

All documents that include personal information (student, parent name, items purchased) must remain on school premises.

1) Deposits:

Whenever possible, items will be posted on the Board approved software for online payment (School-Day).

Schools may not receive funds through accounts set up directly or indirectly through individual staff or volunteers where the payments have been processed by a non-Board approved payment processor or online website.

All fees must be available for payment online. Parents/Guardians will be provided alternative methods of payment (Cash/cheque) if online payment causes undue hardship.

CSC Treasurer/committee will maintain the collected Council funds on school property at all times. The funds will be counted, **verified** and organized for deposit on school premises by two or more approved Council volunteers **on a timely basis**. Council funds will **not** be re-counted by the Sr. School Secretary/Bursar.

- a. The school needs to provide the Council with a supply of:
 - i. Specific bank night wallet envelopes/bags OR
 - ii. Bank deposit bags and pre-numbered tags OR
 - iii. Board provided re-usable deposit bag and pre-numbered security seals
- b. The customized bank deposit slip (Admin 11) will be utilized by Council for deposits. Bank account information can be obtained from the Principal before photocopying extra blank copies to use.
- c. The Council Treasurer/committee shall stamp the cheques for deposit with the bank account # in **green** ink (see NSF segment) to identify CSC. All other particular bank procedures (coin rolling, etc.) for deposit must be followed.
- d. Council will complete the customized bank deposit slip (Admin 11) including the **reason** for deposit and have authorized by the approved committee counting the funds and the Treasurer or Chair (signatures as approved by Council). **One council member will sign the Admin 11 as having counted the funds while a second council member will verify the count and sign the Admin 11.**
- e. Either the bank envelope number or a selected pre-numbered security seal number will need to be input in the "wallet #" area on the Admin 11 form. Two or three copies of the Admin 11 will be required.
- f. Council will insert the counted/organized funds and the original copy of the Admin 11 in the deposit bag provided. The bag or envelope is to be sealed with the seal provided by the bank or the associated pre-numbered security seal that locks the deposit bag.
- g. Council will deliver the sealed deposit bag to the Sr. School Secretary/Bursar with the second copy of the completed Admin 11 form on the outside of the bag.
- h. The deposit bag will be stored in the school safe while being held at the school until

the deposit to the bank is complete.

- i. The Sr. School Secretary/Bursar will deliver the sealed deposit bag to the bank on the next trip to the bank (or hold for bank pickup). The Secretary/Bursar will input the bank deposit amount into SAP. The reason for the deposit should easily correspond with the Council sub-ledger name. If not, also indicate on the Admin 11 form the Council sub-ledger that deposit should be recorded into. The credit will then show in separate sub-ledgers dedicated to Council transactions.
- ~~j. A third copy of the Admin 11 may be maintained by the Council Treasurer if desired.~~
- k. Council should maintain all supporting documentation for deposits with school finance records, including but not limited to: Hot Lunch order forms, Milk order forms, fundraising pledge sheets or order forms, etc.

2) Cheques:

Any vendors that the Council is dealing with must make contact with regards to payments or any other matter directly with the CSC Treasurer or Council committee (not the Sr. School Secretary/Bursar).

- a. CSC Treasurer or committee member instigating a payment or requiring reimbursement from Council funds will complete a *CSC Cheque Requisition Form* (Admin. 14) in order for a cheque to be issued from CSC funds in the school bank account.
- b. CSC Treasurer or committee member will ensure that the appropriate original detailed invoice/receipt is attached as backup to the cheque requisition form. If the purchase is for an approved Council project, then the CSC meeting minutes or annual financial plan should also be available as backup.
- c. CSC Treasurer will ensure that this completed form is authorized by the School Principal, CSC Treasurer and/or CSC Chair.
- d. The original completed, signed form and backup is then submitted to the Sr. School Secretary/Bursar for cheque processing from a School Council sub-ledger.
- e. HST rebate will be processed as per Board guidelines.
- f. It is advisable for the Treasurer to give the Sr. School Secretary/Bursar a one-day week advance notice if a cheque is required urgently on a specific date.
- g. Specific procedures can be set out to ensure scheduled processing for repetitive payments, such as Hot Lunch days, are carried out. A copy of "blanket" cheque requisition form (Admin. 14a) could be used to indicate the hot lunch dates, while the amounts are filled in as required.
- h. After the cheque has been issued by the Sr. School Secretary/Bursar it will be placed in the Council mail slot for distribution by the Treasurer.

3) Transfers:

- a. School Councils that allocate lump-sum funds to the school to cover specific events/programs can now initiate a transfer between sub-ledgers. A transfer of funds will be required to move money from a School Council sub-ledger to cover some costs in another school sub-ledger within the school bank account.
- b. The CSC Treasurer must complete a *CSC Transfer Request Form* (Admin.15) and have the Principal, CSC Chair and/or Treasurer authorize. If the purchase is for an approved Council project, then the CSC meeting minutes or annual financial plan should also be available as backup.
- c. The Council needs to indicate if the Council needs to continue approving the expenditure from the transferred funds. If yes, then Council will continue to sign on the expenditures (Admin 14) and the sub-ledger to which the transfer is made will show under the School Council account type.
- d. The original completed, signed transfer form is then submitted to the Sr. School Secretary/Bursar for transfer processing.

4) NSF:

- a. The deposit of cheques into the school bank account for CSC activities may result in non-sufficient fund notices from the bank. Since the CSC Treasurer/committee will be stamping the cheques for deposit with the bank account # in *green* ink, this will identify the returned cheque as Council when the bank returns it.
- b. The returned cheque will go directly to the Sr. School Secretary/Bursar since ~~she is~~ **they are** the bank's main contact. The Sr. School Secretary/Bursar will identify the returned cheque as Council due to the green ink stamp. The Sr. School Secretary/Bursar will automatically enter the NSF into the system in the standard manner, debiting the cheque amount & bank fee to a School Council sub-ledger. Notification will then be sent to the Council Treasurer to follow-up with replacement funds.
- c. The CSC Treasurer will follow-up with the payee for reimbursement, including any fee charged by the bank and then deposit the replacement funds in the standard process as outlined in procedure # 1 above.

5) Reports:

- a. For verification purposes, the CSC Treasurer may maintain a photocopy of each submitted deposit, cheque requisition and transfer for Council records.
- b. The Treasurer is to request as needed from the Sr. School Secretary/Bursar the sub-ledger line item printouts indicating all transactions posted for the fiscal year to date.
- c. The Treasurer needs to provide at least one day's notice to the Sr. School Secretary/Bursar when requesting this report.
- d. The Treasurer is to reconcile the sub-ledger line item printouts received from the Sr. School Secretary/Bursar
- e. If there are any discrepancies in the sub-ledgers noticed by the Treasurer, the Treasurer should discuss and reconcile with the Sr. School Secretary/Bursar.
- f. The CSC Treasurer will create regular reports as required for Council meetings based on the sub-ledger printout (Revenue vs Expenditure and Plan/Budget vs Expenditure reports).
- g. The CSC Treasurer will create the Annual Revenue vs. Expenditures report and submit this to the Accounting and Financial Services Department before September 20th of the year following.

Catholic School Council Funds Posted in the School Bank Account
Sr. School Secretary/Bursar Procedures

An accurate recording of all School Council transactions will need to be maintained in separate sub-ledgers in the School Bank Account. These sub-ledgers must articulate only the Catholic School Council **authorized** transactions as indicated below and be set-up with “School Council” account types.

1) Deposits:

CSC Treasurer/committee will maintain the collected Council funds on school property at all times. The funds will be counted and organized for deposit on school premises by two or more approved Council volunteers. Council funds will **not** be re-counted by the Sr. School Secretary/Bursar.

- a. The school needs to provide the Council with a supply of:
 - i) Specific bank night wallet envelopes/bags OR
 - ii) Bank deposit bags and pre-numbered tags OR
 - iii) Board provided re-usable deposit bag and pre-numbered security seals
- b. The customized bank deposit slip (Admin 11) will be utilized by Council for deposits. Bank account information is obtained by Council from the Principal before photocopying extra blank copies to use.
- c. The fully prepared deposit and sealed bank envelope or bag, with a copy of the Admin 11 attached on the outside, will be delivered to the School Office by Council.
- d. The sealed envelope or bag is not to be opened by the Sr. School Secretary/Bursar for any purpose and is to be stored in the school safe until the next bank deposit delivery date (or pick-up by bank).
- e. The outside copy of the Admin 11 will be used by the Sr. School Secretary/Bursar to enter the total deposit amount into SAP with its own deposit document number to credit the appropriate CSC sub-ledger.
 - i) The information can be input as if it is one cheque for the full amount (do not itemize by denomination on the screen as this information is only needed by the bank).
 - ii) Do NOT combine the Council deposit entries with amounts being entered for other school bank account deposits.
 - iii) Input the **wallet#** information into the field “Night Deposit Wallet #”
- f. Take the Council prepared sealed deposit bag to the bank on the next trip to the bank with regular school deposits (or pickup by bank).
- g. The Admin 11 is filed in date order (SAP document# order) along with other school bank account deposit backup.
- h. Council supporting documentation (i.e. Hot lunch orders, Milk orders, fundraising pledge or order form, etc.) can be archived with the appropriate school year’s school banking records.

2) Cheques:

In order for a cheque to be issued from CSC funds (School Council sub-ledgers), a *CSC Cheque Requisition Form* (Admin. 14) must be **completed by Council**. The CSC Treasurer is to ensure that the signatures of the Principal and CSC Treasurer or Chair are on the form and the original detailed receipts/invoices and other details are attached **prior to** submission to the Sr. School Secretary/Bursar.

APPENDIX A

- a. If an invoice arrives at the school for payment, the Sr. School Secretary/Bursar can determine if the payment is from Council funds or School/GSB funds. If it is determined as Council, the invoice is placed directly into the Council mail slot for CSC processing.
- b. When the completed CSC Cheque Requisition Form & attachments are submitted to the office, the Sr. School Secretary/Bursar ensures that the proper backup receipts/invoices are attached and processes a cheque from SAP in the standard manner as outlined in the SAP School Banking guide.
- c. As with any school bank account cheque, the Sr. School Secretary/Bursar may need to tabulate the HST totals from the backup documentation for entry into the system in order to claim the appropriate HST rebate.
- d. The issued cheque stub (bottom) is attached to the cheque requisition form and backup and filed along with all other school bank account cheque backup in cheque# order.
- e. The issued cheque and middle stub are placed directly into the Council mail slot for the Council Treasurer to completely handle the distribution of the payment.

3) Transfers:

School Councils that allocate lump-sum funds to the school to cover specific events/programs can now initiate a transfer between sub-ledgers. A transfer of funds will be required to move money from a School Council sub-ledger to cover some costs in another school sub-ledger within the school bank account. The CSC Treasurer must complete a *CSC Transfer Request Form* (Admin. 15) and have the Principal, CSC Chair and/or Treasurer authorize. If the purchase is for an approved Council project, then the CSC meeting minutes or annual financial plan should also be available as backup.

- a. Upon receipt of the original, signed transfer form the Sr. School Secretary/Bursar processes a transfer in the standard manner as outlined in the SAP School Banking guide.
- b. The Council needs to indicate if the Council needs to continue approving the expenditure from the transferred funds. If yes, then Council will continue to sign on the expenditures (Admin 14) and the sub-ledger to which the transfer is made will show under the School Council account type.
- c. The transfer printout and signed form is filed along with all other school bank account transfers in a section dedicated for this purpose in the fiscal year school bank account reporting binder.

4) NSF:

- a. A returned cheque deposited for Council will go directly to the Sr. School Secretary/Bursar since ~~she is~~ **they are** the bank's main contact. The Sr. School Secretary/Bursar will identify the returned cheque as Council due to the green ink stamp used by Council at the time of deposit.
- b. The Sr. School Secretary/Bursar will automatically enter the NSF into the system in the standard manner, debiting the cheque amount & bank fee to a School Council sub-ledger.

- c. The printed notification form or other agreed documentation can then be placed in the CSC mail slot for the Council Treasurer to follow-up with replacement funds.
- d. The CSC Treasurer will follow-up with the payee for reimbursement, including any fee charged by the bank and deposit the replacement funds following the deposit procedure.

5) **Reports:**

- a. The Sr. School Secretary/Bursar will print the sub-ledger line item report(s) for Council sub-ledger(s) for the **entire fiscal year-to-date** on a regular basis and as requested by Council. (recommended to be done directly after monthly bank reconciliation process along with all other monthly reports). Since Council meetings do not always occur on a monthly basis, the Treasurer may ask the Sr. School Secretary/Bursar for this printout on an as needed basis.
- b. The Treasurer needs to provide at least one day's notice to the Sr. School Secretary/Bursar when requesting this report.
- c. It is the Treasurer's responsibility to reconcile the sub-ledger line item reports to the CSC records. If there are any discrepancies in the ledgers noticed by the Treasurer, the Treasurer and Sr. School Secretary/Bursar need to discuss and reconcile.
- d. Additional training can be provided to the Sr. School Secretary/Bursar if an electronic version (excel) of these reports is requested.

Secondary School Fee Guidelines

Student Activity Fee	Student Activity Fees are allowable under the Ministry of Education Fee Guidelines. This fee, while voluntary, is customary in YCDSB secondary schools and covers such things as yearbooks , student agenda books, student activities, athletics, etc. The costing of these services provided to students is based on full participation of the student body. With less than full participation, costs will increase. Some items, such as the yearbook, will not be available if not ordered at the time of the Student Activity Fee collection. The student activity fee is usually collected at the time of course selection for ease of tracking, though it is not related to registration or course selection.	
Catholic School Council Donations	Voluntary contributions can be requested to the Catholic School Council. These funds are distributed by the council to support and enhance school activities and equipment, above and beyond the funding provided by the Ministry of Education. If the school wishes to offer income tax receipts for donations of \$25.00 or more, the school must submit for approval an Admin 101 Request for Approval of Board Registered Charity Program <u>each school year</u> offered. Upon approval, these donation cheques would need to be payable to the YCDSB.	
Special Optional Programing	Special board programs that students choose to attend through a voluntary application process and that are over and above the regular diploma programme have fees: International Baccalaureate, Regional Arts Programs, High Performer Athlete Program, Laptop Program, Deca , etc.	
Lost or Damaged Materials	Students will may be charged the replacement or repair costs for lost or damaged textbooks or other learning materials or equipment, including library books.	
Financial Assistance	As is our long-standing practise, families experiencing financial difficulty are encouraged to communicate with the Principal in confidence to seek assistance with fees, as needed.	
Subject Enhancement Fees	Basic learning materials and activities are provided to each student in order to enable the achievement of the credit and to meet graduation requirements. The Ministry guidelines allows for fees to be charged for enhancements to the basic learning materials and activities. The Ministry does NOT allow for fees to be charged for textbooks or workbooks under any circumstances. All field trips or excursions are considered a voluntary enhancement; a basic in-school learning alternative will be provided for those not participating.	
	Drama	no course fees
	Arts - Music	basic music delivery is vocal; fees may apply for musical instruments
	Arts - Visual Art	basic materials provided; voluntary enhancement art kit is available for purchase
	Arts - Dance	no course fees; student must provide own shoes and dance wear
	Bus. - Accounting	no course fees
	Bus. - Entrepreneurship	no course fees
	Bus. - Marketing	no course fees
	Bus. - other	no course fees
	CWS - Civics	no course fees
	CWS - Economics	no course fees
	CWS - Family Studies	basic materials provided; voluntary enhanced materials are available for purchase
	CWS - Geography	no course fees
	CWS - History	no course fees
	CWS - Law	no course fees
	Cooperative Education	Transportation to placement is subsidized but not fully covered
	English	no course fees; voluntary enhanced materials are available for purchase (i.e. writing guide)
	E.S.L.	no course fees
	Mod. Lang: French, Italian, & Spanish	no course fees
	Math	students may want to purchase their own graphing calculators
	Physical Education	CPR program is provided in Gr. 9, optional test for certification has a fee; voluntary enhanced courses are available in the senior grades, with an fee for off-site activities
	Religion	no course fees
	Science	senior students may wish to purchase their own upgraded safety goggles

	Tech. Studies -	basic materials provided; voluntary enhanced materials are available for purchase
	Communication Tech.	basic materials provided; voluntary enhanced materials are available for purchase
	Design & Tech	basic materials provided; voluntary enhanced materials are available for purchase
	Green Industries	basic materials provided; voluntary enhanced materials are available for purchase
	Hairstyling & Aesthetics	basic materials provided; voluntary enhanced materials are available for purchase
	Hospitality & Tourism	no course fees; certification test fee
	Manufacturing Tech.	basic materials provided; voluntary enhanced materials are available for purchase
	Transportation Tech.	basic materials provided; voluntary enhanced materials are available for purchase
	Construction Tech	basic materials provided; voluntary enhanced materials are available for purchase

DRAFT

Policy 603A School Fundraising, 603B Fundraising for External Charitable Purposes, and 803 School Generated Funds

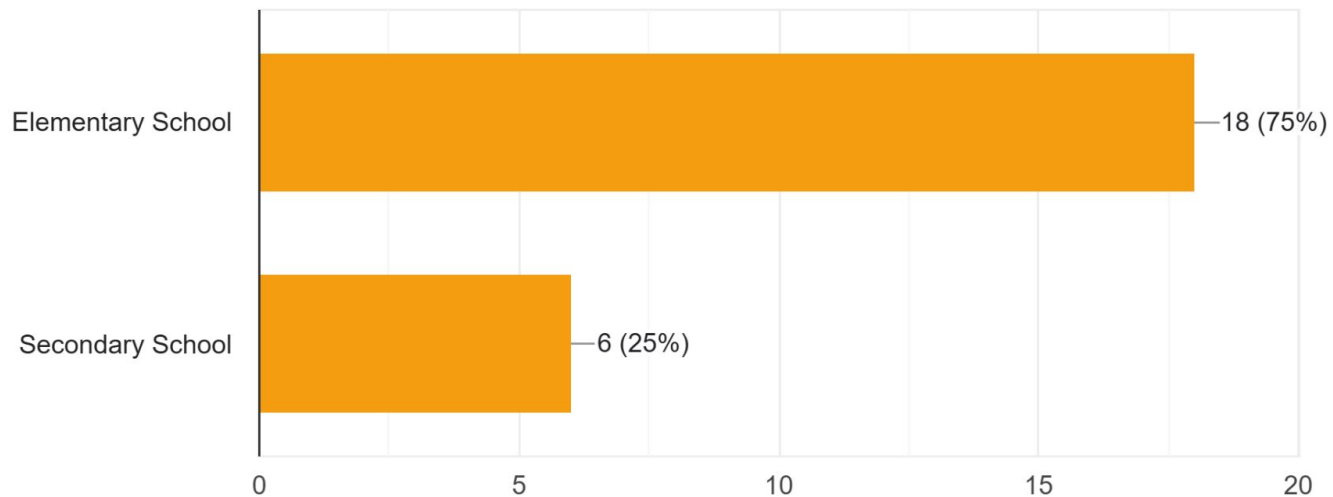
Consultation Summary March 2025



Population Consulted

School Type

24 responses



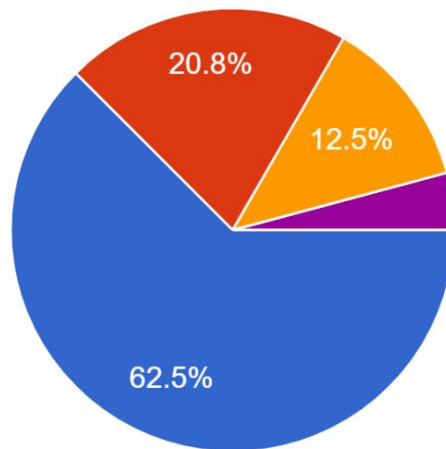
- Consultation form sent to all YCDSB Principals
- 24 responses total (18 elementary + 6 secondary)



Policy 603A & 603B Overall Effectiveness

How would you rate the overall effectiveness of Draft Policies 603A and 603B in supporting your school with planning and managing fundraising activities?

24 responses



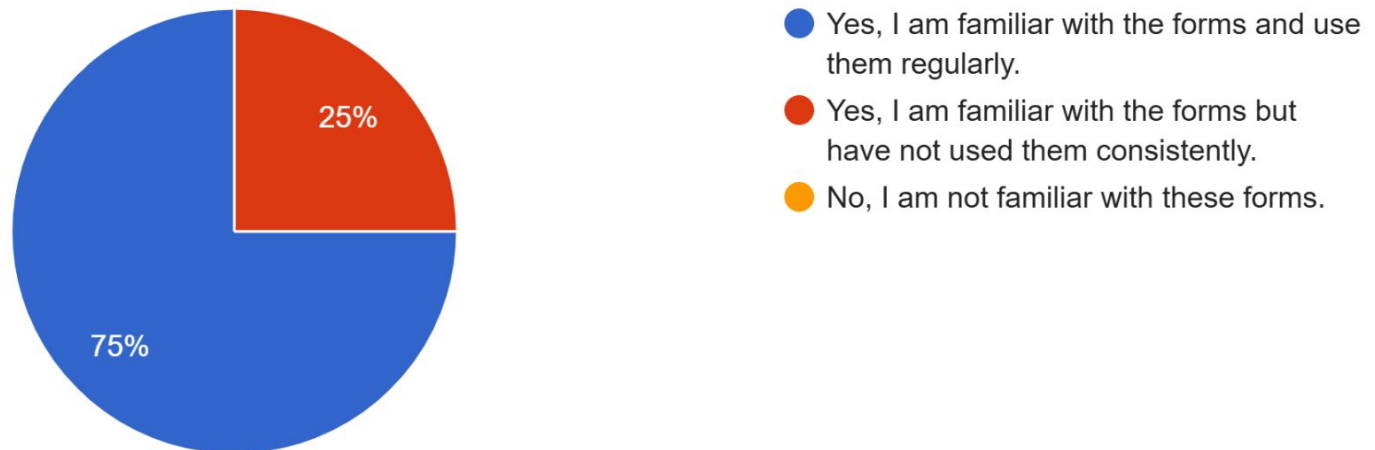
- Very effective – The policies give clear and useful guidance.
- Somewhat effective – The policies help to some extent, but they could be clearer.
- Not very effective – The policies create some challenges that make it hard to...
- Ineffective – The policies get in the way of fundraising and cause major problems.
- It is important that all schools are consistent with the raffle/game of chance policies.

- A majority (**15 schools**) responded that the policies are very effective
- **5 schools** responded that the policies are somewhat effective
- **3 schools** responded that the policies are not very effective
- 1 school had an additional comment regarding consistency of raffles/games of chance
- Generally, the policies are well-received, but there are areas where improvements can be made

Fundraising Forms

YCDSB Draft Policies 603A and 603B require the use of specific fundraising forms (Admin. 86, 86A, and 86B) for planning and tracking fundraising activities. Have they been part of your fundraising process?

24 responses



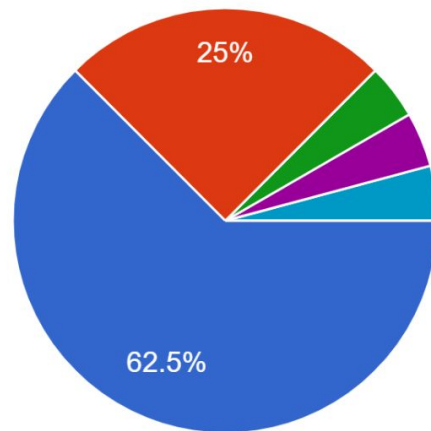
- A majority (**18 schools**) responded that they are familiar with the forms and use them regularly
- **6 schools** (4 of which are secondary) responded that they are familiar with the forms but have not used them consistently
- While Principals are familiar with these forms, there's a need to address the issue of inconsistent usage to ensure full compliance



Major Fundraisers

Draft Policies 603A and 603B limit major fundraisers to two per year (one per term). Do you find this limitation appropriate?

24 responses



- Yes, the limitation is appropriate
- No, more flexibility is needed
- Not sure
- A fundraiser is considered major if \$10 per student is raised - in a school of 200 students, that would be \$2000. Should...
- Generally this limitation would have been appropriate if we didn't have the...
- I am still uncertain if the policy is of two major fundraisers is only for CSC or fo...

- A majority (**15 schools**) responded that this limitation is appropriate
- **6 schools** (all of which are elementary) indicated that more flexibility is needed
- 3 schools indicated additional comments/questions regarding fundraising
- While most Principals find the two-fundraiser limit appropriate, a few elementary schools are requesting greater flexibility



Major Fundraisers Feedback (Part 1)

Question: Please elaborate on your perspective. If you believe the current limitation is effective, what benefits have you observed? If you believe more flexibility is needed, what changes would you propose to ensure fundraising remains equitable and manageable for families?

- **Financial Threshold:**

- Many principals find the \$10 per student threshold for a major fundraiser to be too restrictive, especially for smaller schools.
- Suggestions include raising the threshold to \$20 per student or using a fixed dollar amount (e.g., \$5,000).
- They also indicate the need to adjust for inflation and rising expenses.

- **Games of Chance Impact:**

- Changes to rules regarding games of chance have significantly impacted fundraising capabilities, making the two-fundraiser limit more problematic.

- **Administrator Discretion:**

- Many Principals advocate for greater administrator discretion in approving additional fundraisers, with Superintendent oversight.



Major Fundraisers Feedback (Part 2)

Question: Please elaborate on your perspective. If you believe the current limitation is effective, what benefits have you observed? If you believe more flexibility is needed, what changes would you propose to ensure fundraising remains equitable and manageable for families?

- **Fundraising Fatigue:**

- Principals are mindful of "donation/fundraising fatigue" among families and want to avoid overwhelming them with constant requests for donations.
- Principals are aware of the potential for fundraising to exacerbate equity issues and want to ensure that all families have equal access to school programs and resources.

- **Staff Workload:**

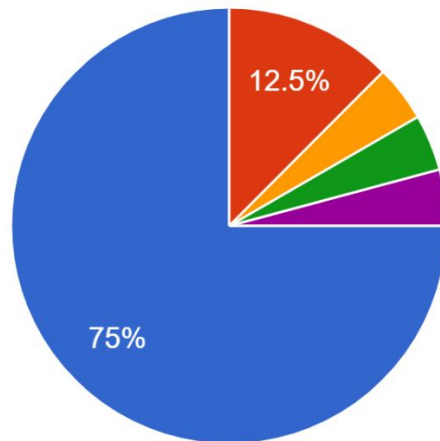
- Organizing major fundraisers is time-consuming and demanding, impacting staff workload and morale.
- Some would like a shared list of successful fundraising ideas.



Minor Fundraisers

Draft Policies 603A and 603B state that minor fundraisers (e.g., those led by classrooms, student clubs, or school councils) should be spaced out and ...in scope. Do you find this limitation appropriate?

24 responses



- Yes, the limitation is appropriate
- No, more flexibility is needed
- It should be more specific (e.g., specifying the number of allowed minor fundraisers)
- Not sure
- Yes, this is appropriate. It also makes sense to not drain your community. Having a guideline works because not everyone operates with common sense.

- A majority (**19 schools**) responded that they find this limitation appropriate
- 3 schools** indicated that more flexibility is needed
- 1 school** indicated that it should be more specific and **1 school** responded not sure
- Principals largely accept the limitations surrounding minor fundraisers



Minor Fundraisers Feedback

Question: Please explain your reasoning. Do you believe this approach helps maintain balance in fundraising efforts, or are there any challenges you face with this recommendation?

- **Balancing and Preventing Donor Fatigue:**
 - Principals generally agree with the need for limitations on minor fundraisers to prevent "donor fatigue" and maintain a reasonable financial burden on families. Spacing out these events is seen as crucial.
- **Need for Flexibility and Administrative Discretion:**
 - While supporting limitations, principals emphasize the importance of administrative discretion and flexibility to address unforeseen needs and school-specific circumstances.
- **Strategic and Intentional Fundraising:**
 - Principals advocate for minor fundraisers to be planned strategically, aligned with school improvement plans or charitable goals, and communicated clearly to families. They stress that these fundraisers should not be reactive or impulsive.



Fundraising Best Practices

Question: Based on your experience, what successful strategies or best practices in school fundraising would you recommend incorporating into Draft Policies 603A and 603B?

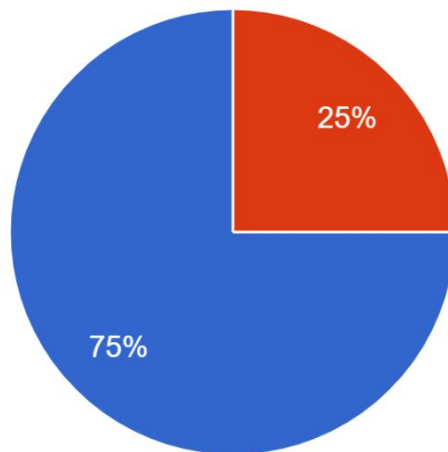
- **Strategic Planning and Collaboration:**
 - Emphasize early planning and collaboration between staff, student leadership, and the Catholic School Council (CSC) to determine fundraising priorities and avoid overlapping events.
 - Encourage the development of a comprehensive fundraising plan at the beginning of the school year, outlining goals and intended use of funds.
- **Diversification and Modernization of Fundraising Methods:**
 - Promote the use of online donation platforms like Canada Helps to facilitate cashless donations.
 - Consider one time donation models.



Policy & Procedure 803 Overall Effectiveness

How would you rate the overall effectiveness of Draft Policy and Procedure 803 (School Generated Funds) in providing guidance and support for the managing, and reporting of school-generated funds?

24 responses



- Very effective – The policy and procedure offer clear and helpful guidance.
- Somewhat effective – The policy and procedure help to some extent, but they could be clearer or easier to follow.
- Not very effective – The policy and procedure create challenges that mak...
- Ineffective – The policy and procedure make it harder to manage finances pr...

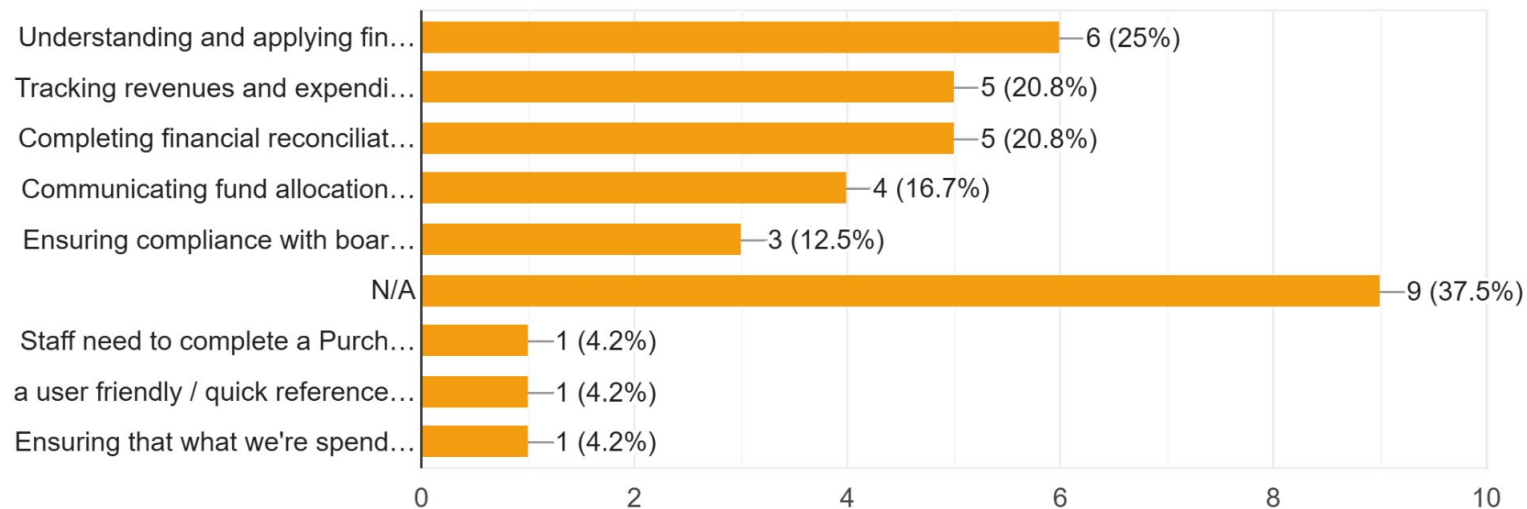
- A majority (**18 schools**) responded that the policies are very effective
- **6 schools** responded that the policies are somewhat effective
- Overall, Principals acknowledge that the policy and procedure are effective, but there may be an opportunity to enhance its clarity



School-Generated Funds Challenges

What aspects of managing school-generated funds present the greatest challenges for your school?
(Select all that apply)

24 responses



- A majority (9 schools) responded N/A
- 6 schools responded “Understanding and applying financial reporting requirements”
- 5 schools responded “Tracking revenues and expenditures accurately”
- 5 schools responded “Completing financial reconciliations and audits”
- 4 schools responded “Communicating fund allocation to the Catholic School Council and school community”
- 3 schools responded “Ensuring compliance with board policies and regulations”
- 3 schools indicated additional comments



School-Generated Funds Challenges Feedback (Part 1)

Question: Please explain your response. For the aspects you selected, please describe why these areas are challenging for your school. Are there specific barriers or resource limitations that contribute to these difficulties?

- **System and Procedural Complexity:**
 - The SAP system is perceived as user-unfriendly, making tracking information difficult.
 - Lack of clear direction on fund allocation, subledger management, and reporting forms creates confusion.
- **Communication and Collaboration Issues:**
 - Challenges arise when CSC members lack financial knowledge or disagree on fund allocation.
 - Staff resistance to providing detailed purchase information slows down the approval process.



School-Generated Funds Challenges Feedback (Part 2)

Question: Please explain your response. For the aspects you selected, please describe why these areas are challenging for your school. Are there specific barriers or resource limitations that contribute to these difficulties?

- **Resource and Personnel Limitations:**

- The time constraints of the Principal role, with safe schools and special education consuming much of the day, means that financial reviews are often pushed to the bottom of the priority list.
- Dependence on the head secretary, with variations in skill and availability, significantly impacts fund management.
- Lack of adequate training for supply secretaries leads to inconsistencies.
- Budget limitations restrict flexibility in meeting diverse school needs.

- **Clarity and Training Needs:**

- A need for more in-depth PD on reporting requirements, tracking, and fund transfers.

YORK CATHOLIC DISTRICT SCHOOL BOARD



BOARD POLICY	
<i>Policy Section</i> Students/Admissions	<i>Policy Number</i> 220
<i>Former Policy #</i>	<i>Page</i> 1 of 5
<i>Original Approved Date</i>	<i>Subsequent Approval Dates</i>
September 1, 2009	November 23, 2010 October 2, 2012 May 26, 2015 June 18, 2019 November 26, 2019 March 6, 2024

POLICY TITLE: GRADUATION EXERCISES IN ELEMENTARY AND SECONDARY SCHOOLS

SECTION A

1. PURPOSE

The York Catholic District School Board acknowledges that graduation exercises are an important recognition of a student's transition from elementary to secondary school, and upon leaving secondary school. Graduation exercises celebrate the human journey of each student. The student throughout his/her years in the Catholic school system has experienced an education that fosters learning as a lifelong spiritual and academic quest. This learning is defined not only in terms of knowledge and skills, but also in terms of values, attitudes, actions and faith experiences as these are core elements that distinguish us as an English Catholic school system.

2. OBJECTIVE

It is the policy of the York Catholic District School Board that Elementary and Secondary Graduations shall be acknowledged by appropriate exercises that celebrate our Faith, the Ontario Catholic Graduate Expectations, and recognize those partners who have contributed to this milestone in each student's life journey.

3. PARAMETERS

- 3.1 All Graduations shall reflect our distinctiveness as a Catholic school system.
- 3.2 All Graduation celebrations shall include a Mass with the graduates, their teachers, and where possible, their families.
- 3.3 All local Pastors shall be invited to participate in Elementary and Secondary school Graduations.
- 3.4 Graduation exercises shall respect:
 - 3.4.1 Protocols, as identified in the guidelines;
 - 3.4.2 The inclusion of a prayer or liturgical reflection;

- 3.4.3 Time constraints;
 - 3.4.4 Cost and financial stress on families to participate;
 - 3.4.5 Appropriate language and subject matter in speeches and addresses;
 - 3.4.6 That the event is for the students, therefore inclusion of guest speakers and presenters shall be kept to a minimum.
- 3.5 Schools may collect fees for graduation celebrations. Principals should take particular note to ensure that no family suffers undue hardship as a result of a graduation celebration.
 - 3.6 The format of the graduation celebration must be vetted annually with the community, through the Catholic School Council to ensure that costs are reasonable.
 - 3.7 The order of the graduation ceremony shall follow the greetings outline as indicated in the program guidelines.
 - 3.8 The *York Catholic District School Board Faith Leadership Award* shall be conferred by a School Trustee (if present) on one female and one male graduating secondary school student who has demonstrated a commitment to the Religious Education program of the school and to the Board's vision as a recognized leader in Catholic education committed to inclusion, excellence and innovation that develops socially responsible global citizens.
 - 3.9 Award presentations shall be carefully structured to ensure that:
 - 3.9.1 The student receiving the award most closely embodies the intent of the award; and,
 - 3.9.2 The purpose and application of the award is clearly understood by the community;
 - 3.10 The guest list for Graduation exercises should reflect a balance between the necessity of the guest's presence, their role at the event, and a respect for their personal time.
 - 3.11 Special guests shall be acknowledged but not necessarily invited to address the audience or make presentations.
 - 3.12 Secondary schools, shall hold Graduations in June of the graduating year and will inform their elementary feeder schools of the date as soon as possible, no later than December 31st of the prior year.
 - 3.13 Elementary schools shall make every effort to hold Graduations no sooner than the Wednesday prior to the last week of school, and ensure that the Graduation is not held on the same night as the Secondary school graduation.
 - 3.13.1 It is recommended that elementary school Graduations be held in the evening.
 - 3.14 The number of awards in an Elementary School Graduation is expected to be proportionate to the number of graduates.
 - 3.14.1 In circumstances in which more than half of the students are receiving an award, then all students are to be recognized.
 - 3.15 Each school shall adhere to the parameters and guidelines of this policy when designing its Graduation ceremony that will be reflective of the community in which it is located and respectful of the traditions that have been established.

4. RESPONSIBILITIES

4.1 Board of Trustees

- 4.1.1 To bring greetings to the Graduates and to the assembly on behalf of the York Catholic District School Board.
- 4.1.2 To participate in the Graduation celebrations as requested by the organizing body.

4.2 Director of Education

- 4.2.1 To oversee compliance with the Graduation Exercises in Elementary and Secondary Schools policy and related guidelines.

4.3 Superintendents of Education

- 4.3.1 To support the implementation of the Graduation Exercises in Elementary and Secondary Schools policy and related guidelines.
- 4.3.2 To gather, review and authorize the graduation ceremony program prior to publication.

4.4 Schools (Administration and Staff)

- 4.4.1 To provide leadership in organizing Graduation exercises that honour the Catholic education which the graduates have received and acknowledge the individual success of each graduating student.
- 4.4.2 To ensure that procedures and protocols outlined in the Graduation Exercises in Elementary and Secondary Schools policy and related guidelines are strictly adhered to.

5. CROSS REFERENCES

YCDSB Policy 218 [Code of Conduct](#)

YCDSB Document Graduation Liturgies

Approval by Board	<u>March 6, 2024</u> Date
Effective Date	<u>March 7, 2024</u> Date
Revision Dates	<u>March 6, 2024</u> Date
Review Date	<u>March 2028</u> Date

POLICY TITLE: GRADUATION EXERCISES IN ELEMENTARY AND SECONDARY SCHOOLS

SECTION B: GUIDELINES

It is the policy of the York Catholic District School Board that Elementary and Secondary Graduations shall be acknowledged by appropriate exercises that celebrate our Faith, the Ontario Catholic Graduate Expectations, and recognize those partners who have contributed to this milestone in each student's life journey.

The following guidelines are intended to support Policy 220 and provide a framework for Elementary and Secondary Graduation celebrations.

1. GENERAL

- 1.1 School traditions and community preferences need to be considered when planning the occasion; however, the complexity of the event must not place an undue burden on staff or families.
- 1.2 Graduation celebrations held off school property and/or after school hours shall be planned in consultation with administration, school staff and parents.
- 1.3 Staff members who **specifically supervise** a Graduation dinner and/or dance shall not incur the cost of the Graduation dinner and/or dance.
- 1.4 Valedictorian addresses shall be reviewed in advance by the Principal or designate to ensure appropriate language, content and style in order to respect the dignity of the occasion.
- 1.5 The following template shall be used for both Elementary and Secondary Graduation exercises. A form of printed program shall be prepared for families as a memento. A Graduation printed program shall include the following:
 - A page listing the names and titles of the School's Administration, the Chair of the Board, the Vice Chair of the Board, the local Trustee/s, the Director of Education, the Associate Director of Education and the school's Superintendent of Education: School Leadership (provided centrally on an annual basis)
 - The Board's Mission and Vision statements
 - A congratulatory message from the local Trustee/s (provided centrally on an annual basis)
 - A list of graduates
- 1.5.1 Graduation agendas, shall include in the following order:
 - Welcome
 - O Canada
 - Opening Prayer/Reflection (Pastor*, Chaplain or designate)
 - Land Acknowledgement
 - Introduction of Guests (Guests not presenting awards and VIPs only at this time)

- Greetings:
 - Chair of the Board/Local Trustee(s) (there shall only be one Trustee message delivered)
 - Director of Education (if present)
 - Superintendent of Education: School Leadership or designate
 - Catholic School Council Chair
 - Principal
 - Address to Graduates (Teacher/Guest Speaker) – (optional)
 - Conferral of Diplomas/ Certificates of Promotion
 - Elementary school students shall be presented with a standardized York Catholic District School Board Certificate of Promotion (Appendix 1).
 - Secondary school graduates shall be presented with an Ontario Secondary School Diploma (OSSD).
 - Students achieving Honour Roll status shall be recognized during the ceremony. The format of the recognition shall be at the Principal's discretion.
 - The school Principal shall confer all diplomas.
 - Others, such as Vice-Principal(s), Superintendent, Director or Trustee may be asked to accompany the Principal, with due consideration being given to limiting the number of persons on stage at any one time.
 - Awards – School and Community
 - All Trustees in attendance shall be asked to present an award;
 - Faith Leadership Awards shall be conferred by a School Trustee (if present);
 - The Trustee Micheal Carnovale Award is to be presented by a member of the Carnovale family (if able to attend) or a School Trustee (if present);
 - The Susan LaRosa "Learning for All" Award is to be presented by S. LaRosa (if able to attend) or the attending Superintendent of Education: School Leadership
 - Governor General's Award to be presented by Provincial or Federal Member of Parliament, if present or by the Director/ Superintendent;
 - Principal's award to be presented by Principal;
 - Curriculum awards to be presented by teachers;
 - No speeches/remarks by the presenter of the award beyond the description of the award; and,
 - Only where a person, organization or municipality has donated an award should they or their representative be invited to present the award and congratulate the student.
 - Valedictory Address (five to seven minutes' maximum)
 - Final Prayer/Blessing (Pastor* or Principal at the Elementary level; Pastor*, Chaplain or designate at the Secondary level)
 - Closing Remarks
- * If the Pastor of the local Parish is in attendance, he will be asked to lead **either** the Opening Prayer/Reflection **or** the Final Prayer/Blessing
 If more than one Pastor is in attendance, they will be asked to **share** in the lead of **either** the Opening Prayer/Reflection **or** the Final Prayer/Blessing

1.6 Procession/Recession – Secondary Schools

The order for the Graduates procession will be the Principal, followed by the Chair of the Board, Area Trustee/Trustees, Director of Education, Superintendent of Education, Vice-Principal, School Council Chair, Municipal dignitaries, i.e. Mayor, any other VIP's.



CERTIFICATE OF PROMOTION

The York Catholic District School Board congratulates

on the completion of the Catholic Elementary School Curriculum at

Date

Principal

Policy 220 Graduation Exercises in Elementary and Secondary Schools

Consultation Summary - Grade 8 Promotion
February 2025

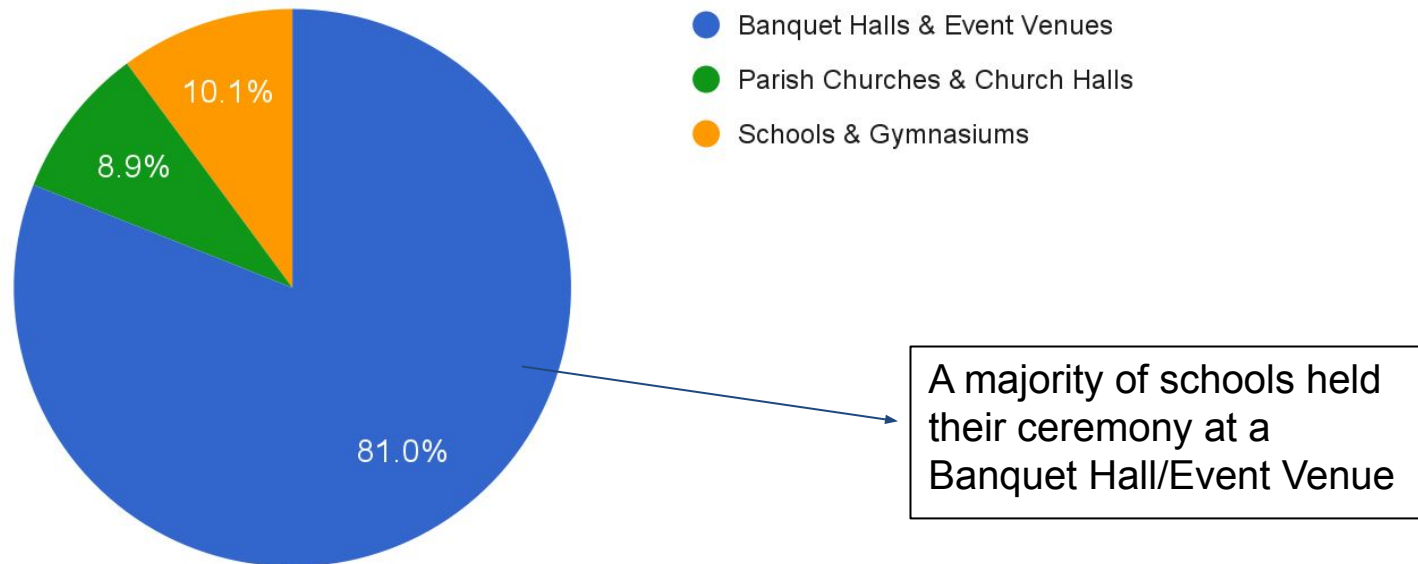
Population Consulted: All elementary schools that go up to grade 8
(79 elementary schools)





Ceremony Location

Where did your 2024 grade 8 promotion ceremony take place? (79 Responses)

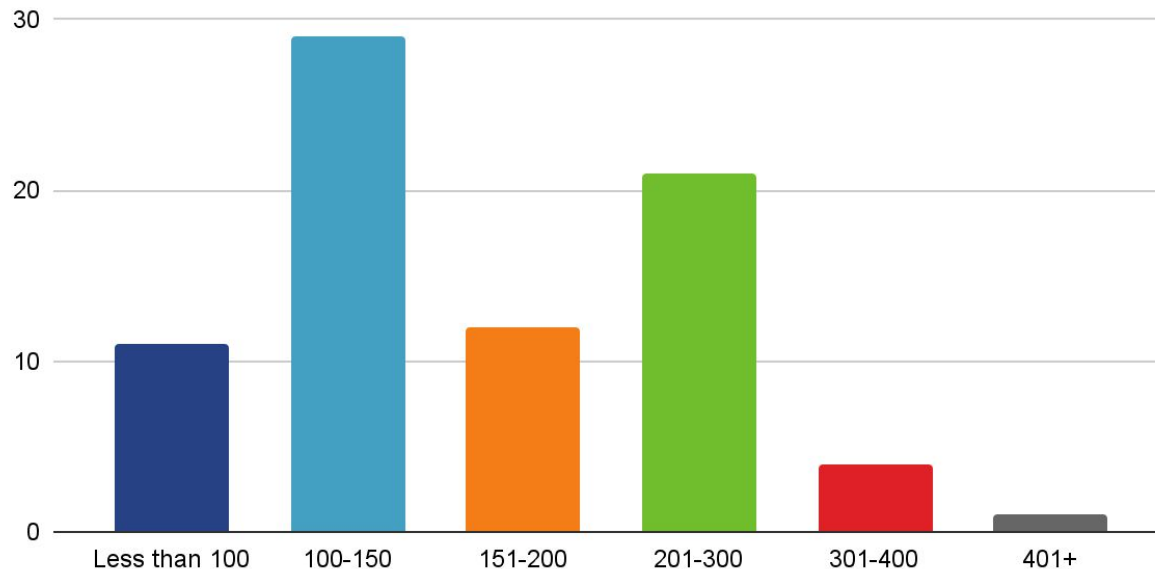


- **Banquet Halls & Event Venues: 64 schools**
 - Frequent examples: Royal Venetian, Montecassino, Bellagio
 - Unique Locations: Old Town Hall, Willow Springs Winery, Golf/Country Club
- **Parish Churches & Church Halls: 7 schools**
 - Examples: St. Elizabeth Seton Parish, St. Justin Martyr Church, St. Patrick Church
- **Schools & Gymnasiums: 8 schools**
 - Examples: School gym, local high school



Approx # of People at Ceremony

What was the approximate number of people attending the ceremony? (78 Responses)



- **Less than 100: 11 schools**
- **100-150: 29 schools**
- **151-200: 12 schools**
- **201-300: 21 schools**
- **301-400: 4 schools**
- **401+: 1 school**

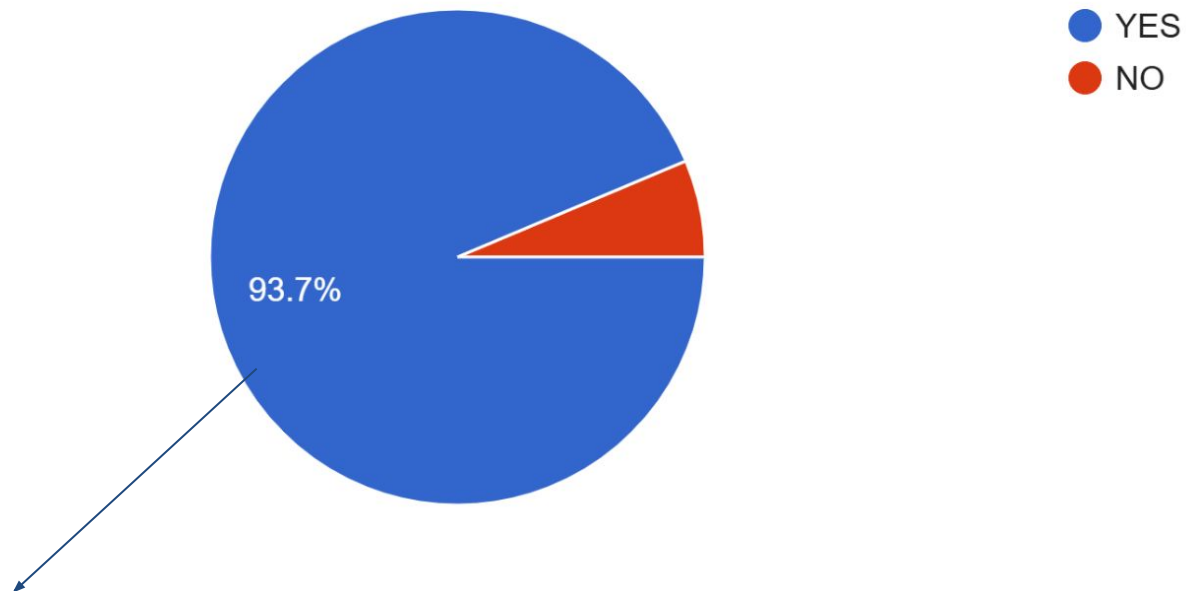
A majority of schools had approx 100-150 people attending the ceremony



Dinner Included

5. Was dinner included in this promotion ceremony?

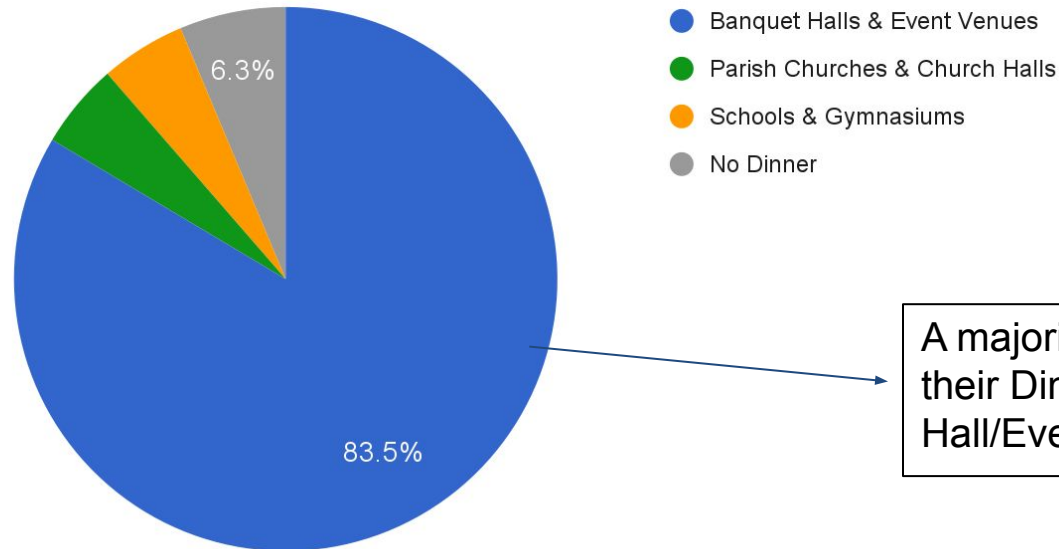
79 responses



- A majority of schools responded Yes (74 schools)
- 5 schools responded No

Dinner Location

Where did the dinner for the promotion ceremony take place?
(79 Responses)



A majority of schools held their Dinner at a Banquet Hall/Event Venue

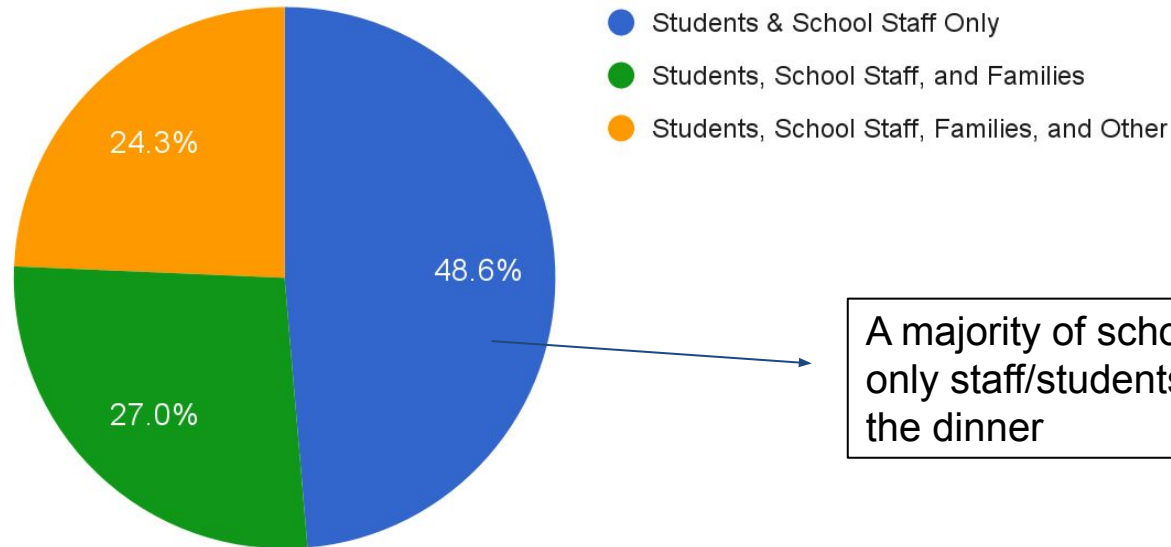
- **Banquet Halls & Event Venues: 66 schools**
 - Frequent examples: Royal Venetian, Montecassino, Bellagio
 - Unique Locations: Town Hall, Winery, Golf Club, Boat Cruise
- **Parish Churches & Church Halls: 4 schools**
 - Examples: St. Elizabeth Seton Hall, Church Basement
- **Schools & Gymnasiums: 4 schools**
 - Examples: School gym, local high school
- **No Dinner : 5 schools**

- A majority of schools held the ceremony & dinner at the same location (approx 95%)



Dinner Attendees

Who was in attendance other than the staff and students?
(Dinner) (74 Responses)



A majority of schools had only staff/students attend the dinner

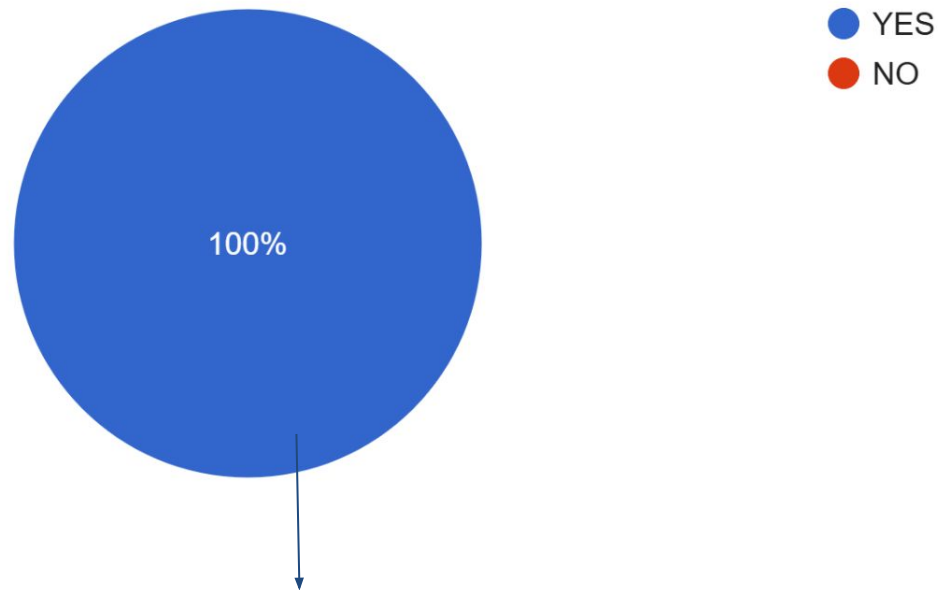
- **Students & School Staff Only: 36 schools**
- **Students, School Staff, and Families: 20 schools**
 - Frequent examples: Parents, Siblings
- **Students, School Staff, Families, and Other: 18 schools**
 - Examples: Trustees, Priests, Superintendents, CSC, etc.



Dance/Celebration Included

8. Was there a dance/celebration included in the promotion event?

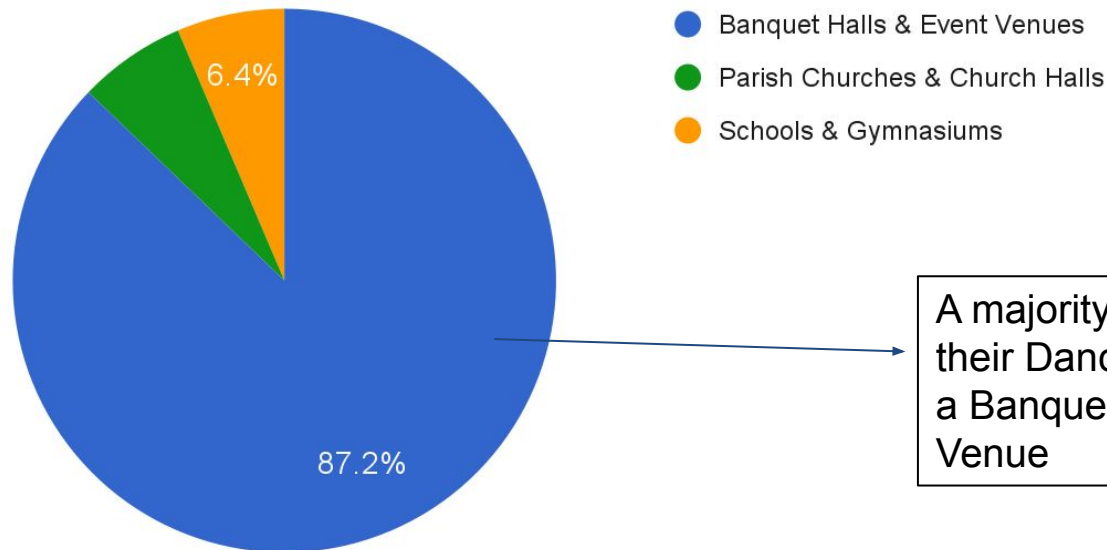
79 responses



- All schools responded Yes (**79 schools**)

Dance/Celebration Location

Where did the dance/celebration take place? (78 Responses)



A majority of schools held their Dance/Celebration at a Banquet Hall/Event Venue

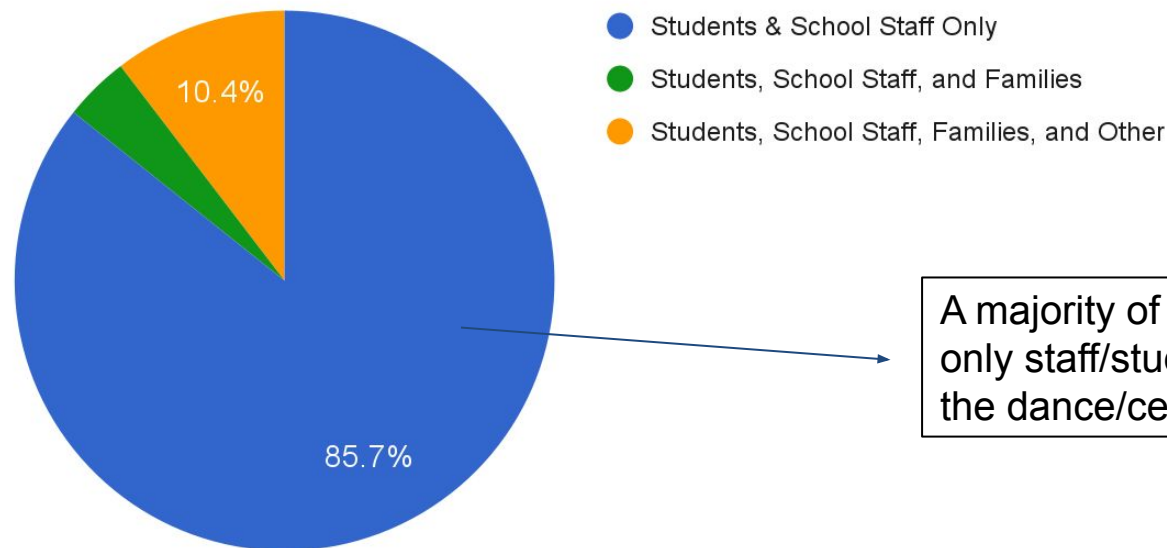
- **Banquet Halls & Event Venues: 68 schools**
 - Frequent examples: Royal Venetian, Montecassino, Bellagio
 - Unique Locations: Town Hall, Winery, Golf Club, Boat Cruise
- **Parish Churches & Church Halls: 5 schools**
 - Examples: St. Elizabeth Seton Hall, Church Basement
- **Schools & Gymnasiums: 5 schools**
 - Examples: School gym, local high school

- A majority of schools held the ceremony, dinner, and dance/celebration at the same location (approx 95%)



Dance/Celebration Attendees

Who was in attendance other than the staff and students?
(Dance) (77 Responses)

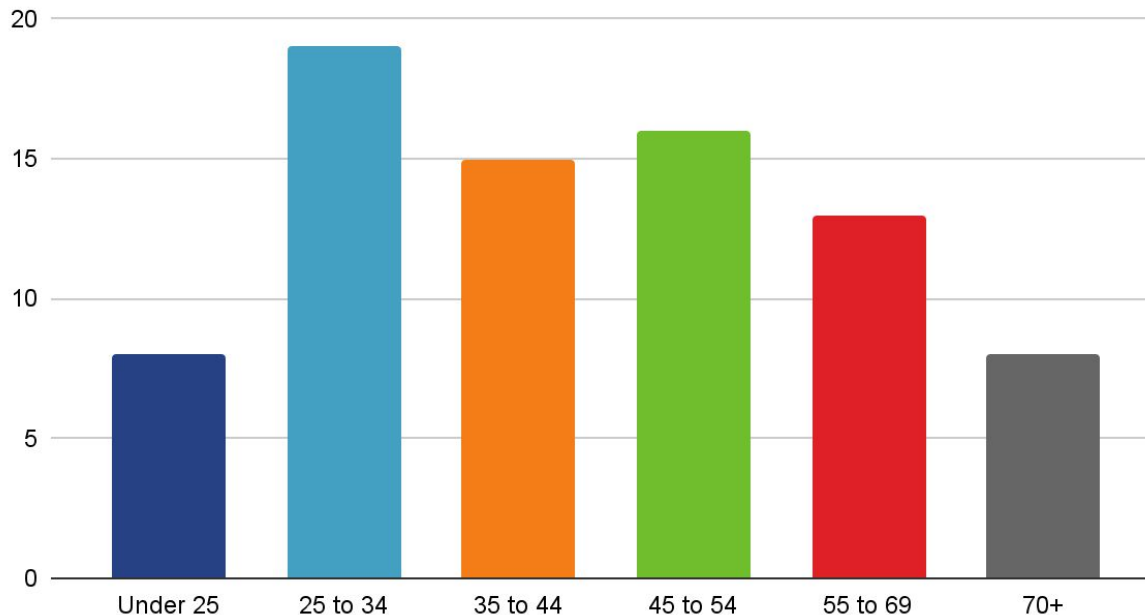


- **Students & School Staff Only: 66 schools**
- **Students, School Staff, and Families: 3 schools**
 - Frequent examples: Parents, Siblings
- **Students, School Staff, Families, and Other: 8 schools**
 - Examples: Trustees, Retired Staff, Superintendents, CSC, Community Members, etc.



Size of Grade 8 Class

How many students were in the grade 8 class? (79 Responses)



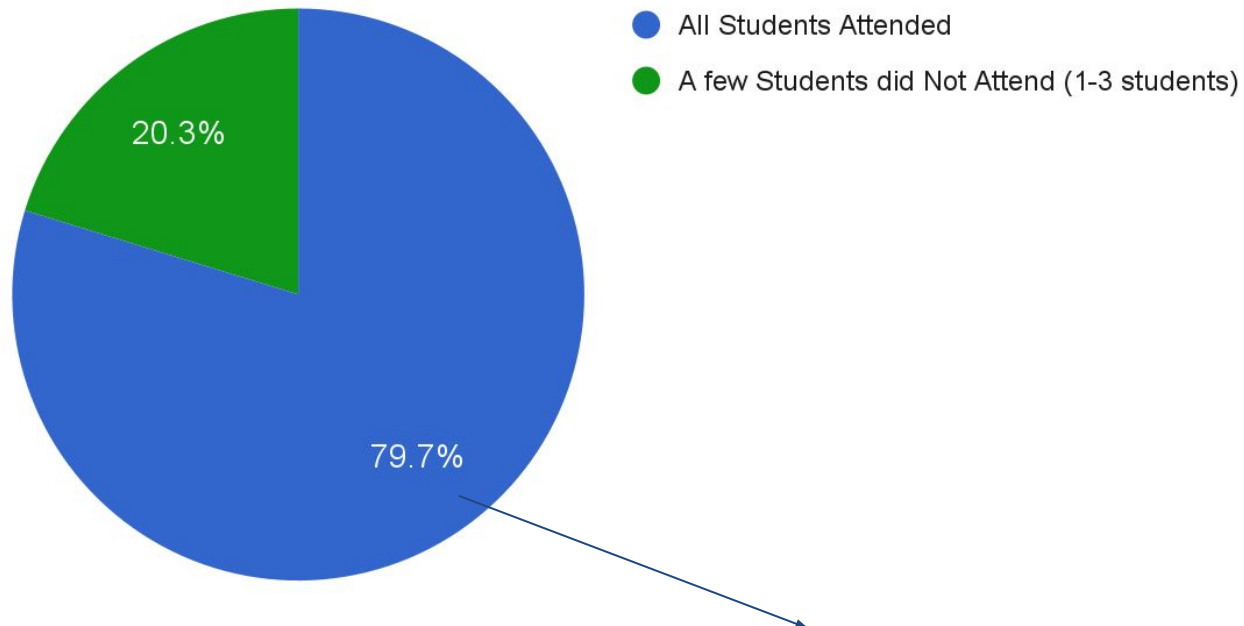
- **Under 25: 8 schools**
- **25 to 34: 19 schools**
- **35 to 44: 15 schools**
- **45 to 54: 16 schools**
- **55 to 69: 13 schools**
- **70+: 8 schools**

Most schools have moderate-sized Grade 8 classes.



Students Not in Attendance

How many students did NOT attend Gr. 8 Promotional events? (79 Responses)

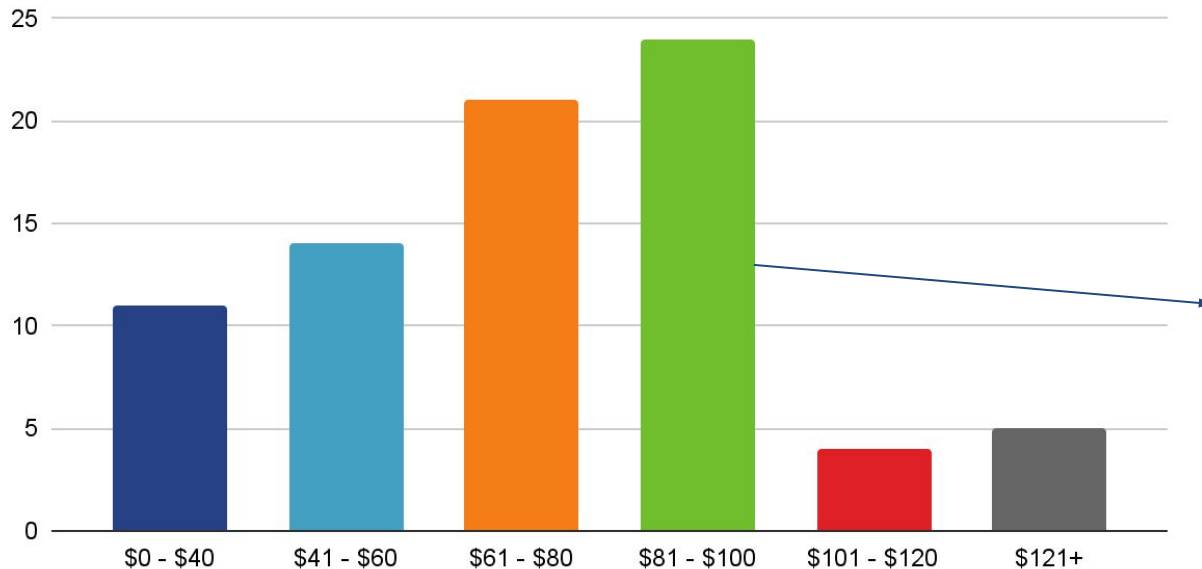


- A majority of schools had full attendance (**63 out of 79 schools**)
- **16 out of 79 schools** reported that a small number of students did not attend (1-3 students)
 - Most schools indicated that these students were absent due to family vacations



Amount Collected Per Student

What was the amount collected per grade 8 student? (79 Responses)



A majority of schools collected \$81 to \$100 per student

- **\$0 - \$40: 11 schools**
- **\$41 - \$60: 14 schools**
- **\$61 - \$80: 21 schools**
- **\$81 - \$100: 24 schools**
- **\$101 - \$120: 4 schools**
- **\$121+: 5 schools**

- Highest amount collected: \$130 per student
- Lowest amount collected: \$0 per student
- Many schools reduced or eliminated costs through fundraising and CSC contributions



Cost Inclusions

Question: Please list what was included in this cost (79 responses)

Most schools included a combination of the following:

1. **Meal & Catering:** Dinner, drinks, dessert, cake
2. **Venue Rental:** Hall or banquet space rental for the ceremony and dance
3. **Entertainment:** DJ, music, photo booth
4. **Awards & Keepsakes:** Graduation plaques, certificates, memory books, framed photos, student gifts
5. **Decorations:** Balloons, flowers, table decor, themed decorations
6. **Additional Experiences:**
 - Candy/dessert stations
 - Graduation composite photos
 - Special gifts (books, personalized keychains, mugs, etc.)