

## Internal Fundraising Policy

**At Cardinal O'Hara, the Advancement Office oversees all fundraising.** The office staff devotes its professionalism and expertise to

- overseeing and coordinating all fundraising efforts in a way that best promotes the interests of the O'Hara school community, parents, graduates and friends who generously support the school
- safeguarding the fiduciary and legal responsibilities inherent in all fundraising efforts

The Vice President of Development and advancement staff are responsible for key elements of effective fundraising, including but not limited to:

- Gathering information about the needs of the school and the interests of our donors
- Managing an ongoing identification, cultivation, solicitation and stewardship program with donors
- Providing recognition and thanks, accurate receipts, tax information and attention to confidentiality
- Providing accountability and regular reports to the Board and the whole community through annual reports
- Overseeing the timeline of all development efforts (e.g., annual fund timeline, special events and programs)

The Vice President of Development reports directly to the President and works in conjunction with the Development Chair of the Board.

## Internal Fundraising Policy

### **Fundraising Guidelines**

1. Every fundraiser must be approved by the Vice President of Development who is the President's designee. Direct fundraising without proper approval is prohibited. This includes:
  - a. every event, sale, raffle, program advertising, sponsorship, etc.
  - b. fundraising by school groups, teams or individuals
  - c. fundraising that is verbal, by telephone, email or print
2. All fundraising must be considered in terms of the timing of our annual fund, capital gift solicitations and primary fundraiser. One-time events must be scheduled in conjunction with annual school calendar. All fundraising activities must be approved by submitting the Fundraising Consent form at least one month prior to the proposed fundraiser.
3. Student-Based Fundraising: Fundraising that is done by students that supports student unity and encourages student activities, needs to be vetted by the Assistant Principal for Student Affairs, the Principal's designee, and the Vice President of Development.

### **Gifts In-Kind**

*Cardinal O'Hara is required to keep accurate records because the school is responsible for recording and reporting all financial gifts.*

1. If an offer is made to purchase an item for a club, team, classroom, etc., it must be discussed with the Vice President of Development **PRIOR** to the item being purchased or donated.
2. Gifts (cash, check, in-kind) given directly to someone other than a member of the Advancement Office must be processed through the office so that proper accounting, processing and stewardship can occur.

### **The Annual Fund**

Tuition does not completely sustain our operating budget. We rely on donations to our annual fund and other development efforts managed by the Advancement Office to support our school. We encourage donors to support the priorities and budgeted needs established by the President, Principal and Board. However, within these guidelines, donors may direct gifts toward major categories of the operating budget.

Cardinal O'Hara asks all of our constituents to support the O'Hara Fund, our annual fund; The Mane Event, our annual fundraising event; and our Corporate Partnership Program, which includes advertising and underwriting opportunities. These funds are typically unrestricted and benefit all of our programs.

### **For More Information**

Please contact Jennifer Tuberosa, Vice President of Advancement, with questions. (610.544.5679 or jtuberosa@cohs.com)