



## Guide and Definitions for Visitors and Fundraisers

### POTENTIAL VISITORS could include:

- **Volunteers:** individuals, businesses and community organizations that provide time, talent and/or resources to schools or the district.

WHO do I contact for information? – D11 Engage – Janit Pollard 520-2202 or Janit.Pollard@d11.org

- Must complete a Volunteer Registration form
- Must check in at school office
- Must log hours
- Must submit to a preliminary background check or extensive background check if accompanying students on an overnight field trip or working with students unsupervised by a District 11 employee

- **Classroom Enrichment Speakers/Presenters (two types):** individuals who provide topical information to students in a classroom or host a field trip or career exploration shadow.

- **Paid Speakers:** require the completion of a Consulting Agreement with a Certificate of Insurance and W-9 form attached.

WHO do I contact for information? – Procurement & Contracting – 520-2068

- **Volunteer Speakers:** registered with D11 Engage – do not complete the general Volunteer Registration form
  - Teachers should schedule through Joan Sousa, D11 Engage
    - Teachers scheduling the speaker themselves need to provide Joan with date, time, speaker's contact information – name, organization/business (if applicable), email, telephone, mailing address, grade, number of students, and topic. Also a description of any risk related concerns; example use of or presentation of animals.
  - Joan creates a confirmation email that is copied to teacher, volunteer speaker, and administrative assistant.

WHO do I contact for information? – D11 Engage – Joan Sousa 520-2302 or Joan.Sousa@d11.org

- **Vendors (two types):**

- **Vendors:** individuals who provide services should sign in as VISITORS so there is a record of their visit. (Examples include but are not limited to, individuals replenishing vending machines, delivering items/food, etc.)

WHO do I contact for information? – Procurement & Contracting – 520-2068

- **Fundraising Vendors:** individuals representing businesses/organizations wishing to promote their products or programs to administrators/staff must check in with D11 Engage. Their approval to contact schools is a Fundraising Privileges Memorandum issued by CSSD11- D11 Engage. The vendor is responsible for providing a copy to the school and a copy is also available online at District 11- D11 Engage website. These vendors are invited in at the principal's discretion. These individuals should sign in as VISITORS so there is a record of their visit.

WHO do I contact for information? – D11 Engage – LouAnn Dekleva, 520-2203

➤ **Fundraisers:**

WHO do I contact for information? – D11 Engage – LouAnn Dekleva, 520-2203 or [LouAnn.Dekleva@d11.org](mailto:LouAnn.Dekleva@d11.org)

- **External fundraiser:** involves a fundraising organization/business to benefit the District 11 group/school and the fundraising organization/business. Approval required through D11 Engage. Fundraising Privileges Memorandum documents this approval. Fundraisers conducted by PTO/Booster Clubs: must go through the normal external fundraiser procedures.
  - **Fundraisers conducted by PTA:** engaging with an external fundraiser/vendor that is holding an activity at a District 11 facility needs to request a Certificate of Insurance or provide PTA’s Certificate of Insurance to the school naming District 11 as Additional Insured for that event. PTA also needs to inform D11 Engage of the fundraiser and provide a copy of the Certificate of Insurance to be kept on file. (i.e. school carnival held by PTA on District property requires a Certificate of Insurance from PTA)
  - **Resell fundraiser:** to sell items that a school purchases for profit. Sales tax must be collected, reported and remitted when applicable.
  - **Internal resell fundraiser:** companies do not visit the school to actively promote or sell their product. Examples are pencils, t-shirts, lollipops, plants etc. No approval is required by D11 Engage.
  - **External resell fundraiser:** companies actively promote or sell their product and will need to be approved with a Fundraising Privileges Memorandum by D11 Engage. Examples are chocolate bars, butter braids, jack links, student art, water bottles, thermos cups, etc.

**ADDITIONAL FUNDRAISING INFORMATION**

WHO do I contact for information? – D11 Engage – LouAnn Dekleva, 520-2203 or [LouAnn.Dekleva@d11.org](mailto:LouAnn.Dekleva@d11.org)

- **Internal fundraiser:** conducted by a school club/organization/sport to raise funds for a specific project/program. These fundraisers do not involve an outside vendor. No approval from D11 Engage is required. (Examples: hat day, PJ day, drama club, etc.) If one of your school “clubs or fees” is not listed as a board approved fee, it needs to be treated as an internal fundraiser. The board approved fees can be found in policies JQ-E-1 through JQ-E-4.
- **Fundraisers for Nonprofit Organizations:** solicitations for funds to benefit a nonprofit organization shall require prior approval through D11 Engage.  
The nonprofit organization must provide:
  - ◆ IRS documentation of their 501(c)3 status
  - ◆ Description of the organization mission, vision and services
- **Online Fundraiser:** My School Bucks is currently the **only** approved online fundraising company  
WHO do I contact for information? My School Bucks questions: Fiscal Services – 719-520-2046  
Other questions: D11 Engage – LouAnn Dekleva, 520- 2203 or [LouAnn.Dekleva@d11.org](mailto:LouAnn.Dekleva@d11.org)
- Current online fundraisers not approved include but are not limited to:
  - ◆ Gofundme.com
  - ◆ Fundforteachers.org
  - ◆ Payforit.net
  - ◆ Yankeecandles.com
  - ◆ Schoolstore.com
  - ◆ Mylocker.net
  - ◆ escrip.com
  - ◆ Paypal.com

## Other Terms & Definitions

**Board Approved Fees:** are student fee schedules to include not only those fees that are collected for the benefit of the District's general fund, but also fees that are charged and collected for the benefit of schools' individual activity accounts. (Please refer to policies JQ, JQ-E-1, JQ-E-2, JQ-E-3, JQ-E-4)

**Consultant Agreement:** is a contract between the District and an independent entity to provide professional services to the District, which a District Employee cannot provide, and for which the District will provide monetary payment.

WHO do I contact for information? – Procurement & Contracting – 719-520-2068

- Principals have authority to contract up to \$500
- Contracts above \$500 must be sent to Procurement & Contracting
- Must be accompanied by a Certificate of Insurance (as defined) and a W-9 form (as defined)

**Certificate of Insurance:** documents the community organization's insured coverage. The District requires \$1,000,000 general liability (\$2M if they have direct contact with students) and naming Colorado Springs School District 11 as Additional Insured.

WHO do I contact for information?

Risk Related Services – Diane Vanderpool, 520-2398 or [diane.vanderpool@d11.org](mailto:diane.vanderpool@d11.org) .

D11 Engage – LouAnn Dekleva, 520-2203 or [LouAnn.Dekleva@d11.org](mailto:LouAnn.Dekleva@d11.org)

**W-9 form:** an IRS form is used by companies and individuals which certifies the taxpayer identification number (TIN) and used for purposes of tax reporting. The District must have a verified W9 on file before paying a vendor. Due to Colorado PERA information requirements, the District prefers vendors to use the District's substitute W9 which is located on the Intranet under Forms, Accounting:

<http://intranet.d11.org/Pages/Forms.aspx>

We are often asked to provide the District's W9 when being paid and this can be provided by contacting Fiscal Services.

WHO do I contact for information? – Fiscal Services – 719-520-2046

**Sales Tax:** when departments and schools sell items (like a store) to students, teachers, or the general public, appropriate county and city sales taxes must be collected, reported and remitted. The current combined sales tax rate to be collected is 4.35%. Please contact your Admin. Asst. / Business Sec. for additional information if selling items.

WHO do I contact for information? – Fiscal Services – 719-520-2046