

# Research

## R E P O R T

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## Fees, Fundraising and Fairness

### A Guide for Schools

This resource was commissioned by Saskatchewan Learning and the Saskatchewan School Boards Association.

This resource is intended to assist schools and school boards in decision making regarding school fees and fundraising. Read this report for information regarding:

- ✓ Clarifying the impact of fees and fundraising on equitable access to public education.
- ✓ Identification of issues related to school fees and fundraising.
- ✓ Guidelines for developing appropriate school policy and practices.
- ✓ Suggested approaches for monitoring practice.

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# *Abstract*

This resource was commissioned by Saskatchewan Learning and the Saskatchewan School Boards Association (SSBA). It was written to assist schools and school boards as they engage in decision making regarding issues related to school fees and fundraising.

The perspective presented is rooted in the understanding that our provincial education system is based on equitable access to public education and that, in Saskatchewan, we are committed to providing all children with a high quality education. To this end, the guidebook addresses issues related to school fees and fundraising that may interfere with students' rights to a high quality education. It also reviews pertinent legislation in this area and provides examples of supportive policy. It is intended to encourage school and school division administrators to monitor their present situation so that they are better able to make decisions to ensure that all students have the opportunity to participate equally in school sponsored educational benefits.

# Contents

<b>Purpose and Scope of the Guidebook</b> .....	1
<b>Fees, Fundraising and Fairness: The Issues</b> .....	1
<b>School Fees and Fundraising Defined</b> .....	2
<b>The Issues in Brief</b> .....	2
. Monitoring.....	3
. Transparency .....	4
. Opportunities for Equity .....	5
. Educational Benefit .....	7
. Governance.....	9
<b>Fees, Fundraising and Fairness: Expressing     Leadership Through “Policy Governance”</b> .....	11
<b>Duties and Responsibilities: <i>The Education Act, 1995</i></b> .....	11
. Powers of the Board of Education.....	12
. Duties of the Board of Education.....	12
. Right to Education .....	12
. Policy Leadership .....	13
. Policy Governance .....	13
. Suggested Policy Statement – School Fees .....	14
. Suggested Guidelines – School Fees .....	14
. Suggested Policy Statement – Fundraising .....	15
. Suggested Guidelines – Fundraising.....	15
<b>School Fees and Fundraising “Review”</b> .....	16
<b>Resources</b> .....	18
<b>Appendix A - Weekly School Fee Worksheet</b> .....	19
<b>Appendix B – Examples of Some School Fees</b> .....	21

# *Purpose and Scope of the Guidebook*

This guidebook is designed to assist boards of education and school administrators in decision making regarding issues related to school fees and fundraising.

This resource was commissioned to:

- strengthen awareness of the impact of current school fee and fundraising activity;
- serve as a resource for boards of education and school administrators in analyzing current school fee and fundraising practices in schools; and,
- provide a framework for proactively developing appropriate policies regarding school fees and fundraising.

## *Fees, Fundraising and Fairness: The Issues*

School boards across North America are now recognizing the importance of addressing issues surrounding school fees and fundraising. In Saskatchewan, publicly funded schools have made progress toward ensuring that the school doors are open equally to all students. Turning our attention toward ensuring that all children *benefit* equally is also important. While we can be justifiably proud of our efforts to maintain an education system that is accessible, flexible and responsive, taking a critical look at our practices and policies regarding school fees and fundraising is particularly important.

You may already have given considerable thought to the way school fees and fundraising are dealt with in your school or school division. You may have read or heard reports in the media, or perhaps fellow members of the education community, or parents or students themselves have brought such issues to your attention. In fact, you may have heard so much from so many different sources that you are left wondering what the real issues are for your school and school division.

*Issues surrounding school fees and fundraising are important to those who are committed to public education.*

Consider:

*What have you heard about school fees and fundraising in your division?  
What are your main concerns?*

# *School Fees and Fundraising Defined*

*School fees include fees charged for educational materials such as the purchase of a novel (in elementary school), 'student fees' (in high school), gym supplies (indoor runners, gym clothes), high school physical education fees, materials fees for Home and Industrial Arts, computer discs etc., school band, choir, sports teams, field trips, end-of-the-year parties.*

Let's begin by explaining what is meant by the terms "school fees" and "fundraising".

**'School fees'** is an all-inclusive term that refers to all those expenses that parents/guardians, or student themselves, might be expected to pay so that they can benefit from the educational opportunities the school offers. Such expenses might include costs associated with purchasing basic school supplies, gym supplies, student fees, school band fees, school choir or playing on a sports team, fees for field trips as well as fees associated with optional activities such as end-of-the-year parties.

'Fundraising costs', which will hereafter be referred to as **'fundraising'**, is also an all-inclusive term that includes a wide variety of activities that students, parents/guardians, teachers and others participate in to raise funds for the school or other agencies. For example, a school carnival held to raise money for the purchase of new computers might require students, parents/guardians, teachers and others to donate their time to organize and operate the carnival as well as their money to participate in the carnival.

## *The Issues in Brief*

Five broad issues related to school fees and fundraising have repeatedly come forward in the media, research reports, and in discussions that have taken place across the province. Each of these issues is outlined briefly and then followed by a discussion that encourages you to consider how each of these issues might relate to your particular situation. Briefly, the issues are:

**Monitoring:** Who is keeping track of the monies collected through school fees and fundraising? Who is monitoring how much is collected or raised and how the money is being spent?

**Transparency in Reporting:** Are students and/or parents/guardians consistently made aware of what they are paying for, how much they are paying and the reasons for payment, both in terms of time and money?

**Barriers to Learning:** Are costs and/or practices associated with school fees and fundraising creating a barrier to equitable learning opportunities for some students?

**Educational Benefit:** Are the school programs' learning objectives, beliefs and goals in harmony with fundraising practices or other activities requiring the collection of fees?

**Governance:** Do the board of education and the school recognize their responsibilities and their authority regarding accounting for costs associated with school fees and fundraising activities? How are the funds administered?

## Monitoring

In these days of tight budgets, administrators may think they are keeping a close eye on school finances. Yet it has been suggested that there is a lack of diligence in the area of school fees and fundraising. **Monitoring** monies collected through school fees and fundraising is the first issue for discussion.

Data gathered from a recent project<sup>1</sup> undertaken by Saskatchewan Learning suggests that costs associated with school fees and fundraising vary across the province. Anecdotal evidence gathered during discussions across the province also suggests such costs even vary greatly between schools that are part of the same school division. Many people now refer to such largely unmonitored costs as the 'hidden costs' of schooling.

Questions you might ask to determine how well school fees and fundraising costs are being monitored in schools in your school division include:

- How are our back-to-school lists compiled? When were they last reviewed and by whom? What is the actual dollar value of the list?
- Who keeps track of the money raised through fundraisers? Who monitors how that money is spent? How is accountability for these funds handled?
- Do we include 'time spent' (by students, teachers, parents/guardians and others) when we consider the costs of fundraising?

*In some school divisions, parents/guardians were asked to purchase specific brands of dictionaries or atlases for their children for one school year and another brand of dictionary or atlas in following years. An atlas or dictionary can cost as much as \$35.00. The School Fees Information Gathering Project, Saskatchewan Learning, (2002).*

**School Expenses: Grade 6 Student in rural Saskatchewan (Family #1)**  
**Basic School Supplies: \$130.47**  
**Gym Supplies: \$40.00**  
**Student Fees: N/A**  
**Fundraising: \$218.00**  
**Band: \$103.50**  
**Total: \$491.97<sup>1</sup>**

<sup>1</sup> The School Fees Information Gathering Project was undertaken because of concerns over the impact that the cost of education may have upon families. Over the course of a school year, the four families who participated in the project kept track of all school-related expenses and described the impact (in both time and money) those expenses had on their families. The School Fees Information Gathering Project, Saskatchewan Learning, (2002).

- Does fundraising include only activities designed to raise funds for the school as a whole or does it include charitable fundraising and individual fundraisers held by different groups in the school community?
- How much, on average, are parents/guardians, students and others expected to ‘spend’ on our fundraisers?

Aside from providing educational stakeholders with a more accurate account of how much money is being collected and how it is spent, close monitoring of funds collected and spent through fees and fundraising has other advantages:

- Keeping track of how much money is being collected and how that money is being spent provides school divisions with reliable information for future planning. For example, accurate information regarding the approximate costs associated with last year’s basic school supply list enables administrators to seek input from parents and provide information on the costs a parent might expect for the coming year.
- Schools may be better able to help reduce costs associated with big-ticket items, such as atlases and dictionaries, if they have an accurate record of what items students are expected to purchase in past and upcoming years.
- School and school division administrators will be better able to defend the items for which they do charge fees or fundraise and to be accountable for all money raised and spent.

## *Transparency*

*“I’ve got a copy of the annual report but I don’t understand what it means. I want to know where that money we raised for the computer lab went and how much and for what I can expect to pay next year for my daughter’s school fees.”*  
- Concerned parent

Closely related to monitoring is **transparency** in reporting. This means that individuals interested in accessing information gathered through monitoring processes will find the information easy to obtain and understand. People’s lives or reputations can be negatively impacted by poor accounting methods or illegal activity around relatively small amounts of money. Transparency is in everyone’s best interest and prevents even the perception of impropriety.

In an organization that is responsible to many stakeholders, transparency often means ensuring that information is available from several sources or at least ensuring that key individuals know how to obtain the information for which interested stakeholders ask.



Transparency in terms of school fees and fundraising practices may mean that we:

- Ensure that information regarding expenses associated with fees and fundraising, and how and why those funds will be used, is easy to find and easy to understand once found.
- Provide opportunities for interested parties to comment on and offer suggestions regarding fees charged, fundraisers planned and reporting practices.

*“I’d like to know what the expenses are for other Grade 8 classes in our school division, what their ‘school supplies’ list looks like, how much they raised through fundraising and how they spent it. But I don’t know where to find that information.”*  
- Interested teacher

Consider

- Does our description of school fees ‘hide’ optional items such as yearbooks, costs of road trips for band, choir, sports teams etc.?

## *Opportunities for Equity*

It is easy to see that transparency in reporting practices will create a better informed public, but it may also have the added benefit of pointing out to those who are directly responsible for decision making other kinds of ‘hidden costs’ related to school fees and fundraising. In this third issue, discussion focuses on ways in which ‘hidden costs’ associated with fees and fundraising activities can interfere with a student’s learning opportunities.

The costs relate to the lost opportunities certain students may suffer because of barriers created by financial constraints. Fortunately, obtaining a better understanding of the first kind of ‘hidden costs’ will provide us with some of the information we need to address this issue.

At different times financial constraints can come into play for any of us and limit our choices. However, for many families living on low incomes, the costs associated with school fees and fundraising can act as a significant restriction when they are considering educational options for their children. For families who have little room in their budget for ‘extras’, costs associated with field trips or joining a sports team can loom large.

In their report to the Canadian School Boards Association, an antipoverty group located in Saskatoon called the Political Action on Poverty<sup>2</sup> identified

*Are you aware of students in your school division whose families live on low incomes? Do you know of students who opt out of certain courses or activities because of familial financial constraints? For example, do you think there are families in the schools in your school division that are using grocery money to pay for school expenses?*

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<sup>2</sup> The Political Action Group on Poverty (PAGOP) based in Saskatoon issued a discussion paper on school fees and expenses and initiated a community wide discussion regarding local school board practices regarding the same in 1999.

several barriers to learning that children from low-income families may encounter as a result of financial constraints:

- Back-to-school time, winter clothing time, and Christmas time all come one right after another and place an enormous strain on families with low incomes. The result is that school fees and expenses compete with putting food on the table.
- School fees and school expenses create tension and stress in low-income families. Children protect themselves and their parents by not telling parents about outings, gift giving and other expenses. Parents may feel ashamed of their inability to pay and participate.
- Parents and children may feel alienated from the school and participate less in school activities.
- Fees and expenses can create barriers for access to special classes and activities for children of low-income families.
- Optional courses that require extra registration fees, equipment rentals or fees to cover the cost of materials are largely paid by public funds but only students whose parents/guardians can afford to pay the extra costs can access these classes.

In the summer of 1997, interviews were conducted on behalf of the Saskatoon Political Action Group on Poverty in order to gain parents' perspectives on school fees. The following are a sample of responses to the questions: "What happens when an event arises at school and you are unable to pay for it? What is the result for you and your children?"

*"My kids just tell the teacher they don't want to go. They're basically just covering for me as a parent. They spend all day in the library."*

*"Sometimes they don't even tell me about events, because they know we can't afford it. I can tell though because they withdraw. If we can't afford it, they sometimes stay home, but a lot of teasing goes on."*

One teacher reported that a student in her Grade 6 class, after having his indoor running shoes stolen, did not attend school for the rest of the week. When the teacher phoned his mother to ask the reason for his absence, his mother explained that the young man was too upset to come back to school without runners. The teacher then suggested that she would find runners for him to wear. The mother explained that the family had saved for the running shoes for 6 months. For more on how poverty affects families read: Ruby Payne's, A Framework for Understanding Poverty Aha Process Inc. (2000).

There are several ways that keeping track of costs and maintaining transparency in reporting can help address these barriers to learning:

- When parents/guardians and students are able to obtain a fairly accurate idea of what the actual costs of schooling will be for the coming year, they will have the information they need to plan in advance for expected expenses both in time and money. They may also feel more positive about the operation of the school.
- Teachers and other staff will have a better understanding of how school funds are being spent and their possible role in monitoring and reporting.
- The actual costs of schooling will be made easily available to the general public, making them more aware of the need to support schooling.
- Specific barriers to learning that individual students may face will become more obvious when parents/guardians, teachers, and administrators all share common information.

## *Educational Benefit*

Addressing the issues of monitoring and transparency in reporting can also help schools and school divisions as they consider the fourth issue: creating harmony between practices surrounding school fees and fundraising and the beliefs and goals of the school (as well as stated learning objectives). Once schools and school divisions have an accurate accounting of how much money is being collected or raised and how that money is being spent, and have provided means for others to review this account, they will be in a better position to address the question:

Are learning objectives and the beliefs and goals of our school program taken into account when fundraising activities and other activities requiring the collection of fees are considered?

There is evidence that school-based administrators and board representatives are already concerned about issues of educational benefit, particularly regarding fundraising initiatives. In a study commissioned by the SSBA<sup>3</sup>, school-based administrators, division office and board representatives

<sup>3</sup> Drs. Keith Walker and Herve Langlois were commissioned by the SSBA to identify and describe the alternative and non-traditional fundraising practices of Saskatchewan educators. A random sample of 200 school-based administrators plus 150 division office and board representatives (LEADS and SASBO members together with board chairpersons) were asked to participate in the study. *Alternative and Non-Traditional Funding For K-12 Education in Saskatchewan*, SSBA Research Report #96-14, 1996.

*How much time do students and teachers spend in fundraising activities in schools in your school division? Is this an educational benefit for students who take part in these activities?*

*What are some other benefits that you can see for schools in your division and for school divisions as a whole? What might be some benefits for schools, staff, students, parent/guardian and others?*

*“I think the first worry as a parent is that fundraising is starting to be expected of us in a way. It’s like becoming the food bank of the education system. It ends up with the assumption that part of the money will be made up by parents. The bigger worry is that there is such a huge difference between the amounts some schools raise compared to other schools. You have some that are raising \$60,000 to \$70,000 and some that are raising nothing.”*

*“You can see it in the schools that are raising a lot of money. They’ve lots of library books, textbooks and classroom supplies and lots of extras. And in the schools that don’t raise that kind of money, they don’t have these things.” (Leader Post, August 25, 2001).*

*How are the fundraisers in schools in your school division determined? Is there a predominance of one type of fundraiser? How do you determine if fundraisers are in keeping with learning objectives and school goals?*

suggested that one of their top five concerns regarding fundraising was “interference with instruction”.

In discussing the implications of their findings, Dr. Walker and Dr. Langlois, who conducted the study, suggested that when considering student involvement in fundraising activities, educators should be concerned about whether the lessons learned are in keeping with “sound educational practice” and the “primary mission of the school” (Walker & Langlois (1996), p.71).

Parents have also voiced their concerns regarding this issue. In an article in a Saskatchewan newspaper, a parent lamented the fact that fundraising efforts may create unwelcome expectations and that inequities created by fundraising may eventually undermine public education itself.

What expectations do your school and the other schools in your division have regarding fundraisers?

How do the proceeds of fundraisers go for “extras” or to fund basic aspects of education?

How do some schools in your division derive greater benefit from fundraisers than other schools in the division?

One parent who participated in the School Fees Information Gathering Project also took issue with the uniformity in focus of the fundraisers at the school her child attended: “It would have been nice to have fundraising efforts that didn’t involve food or entertainment. We have Hot Dog days, Mother’s Day teas, Father’s Day suppers, pizza days, etc. I’d like some different fundraisers, maybe ones that reinforce education, like something to do with drama.” The School Fees Information Gathering Project, Saskatchewan Learning, 2002. P.13.

While issues of educational benefit may be most obvious in fundraising activities, you may also question whether learning objectives are being considered when school activities for which fees are charged, such as field trips and special days, are being planned. Some questions to ask in this regard are:

Does the field trip planned for students in your school have educational relevance? How is it relevant?

What curriculum-related learning objectives are associated with the field trip?

How do teachers in your school division prepare students for excursions so students can make the most of educational opportunities?

Does 'follow up' occur? After the field trip is over is there a follow up activity or activities that relate the trip to educational objectives?

Several benefits may be derived from efforts to make sure practices regarding school fees and fundraising have educational benefit:

- Student learning opportunities may be enhanced as they are reinforced through fundraising and/or school related excursions that involve school fees.
- Matching activities with school/classroom goals will minimize the chance of placing students in positions that are educationally unsound.
- Decisions regarding fundraisers and excursions can be based on agreed upon criteria leading to greater satisfaction amongst staff and stakeholders.

Aside from the 'hidden costs' previously mentioned, there are also the costs associated with time and money spent on activities that do not contribute to educational objectives and/or school goals.

We have also discussed the benefits that may ensue when schools and school divisions are made aware of these costs. However, common sense and experience tell us that none of these benefits will be achieved if no one takes responsibility for ensuring that the process is transparent.

School boards have not only the responsibility, but also the authority to maintain accountability regarding 'costs' associated with school fees and fundraising.

## Governance

Governance is the term that refers to how decisions are made. This is a complicated issue. Perhaps decision making regarding fees and fundraising has operated within an informal approach and decisions have been made without worrying about who decides or what principles guide the decisions. Certainly we must begin by acknowledging that the board of education is responsible for approving the school program and overseeing school system operations. The school principal is responsible for what happens in the school.

*One parent reported having initial concerns about the educational merits of a trip to the Legislative Building in Regina when his daughter requested \$10.00 to cover the expenses. His concerns were quickly dispelled when his daughter showed him a "research map" she was to complete before the trip. When he reviewed the objectives his daughter's teacher had previously outlined for the Social Studies unit the class was working on, it was easy to see how well the trip fit in with learning objectives. He was even more impressed with his daughter's enthusiasm after the trip as she read him her post field trip assignment responses.*

*At present, how do the schools in your school division decide on what fundraisers and excursions to include? What criteria are used?*

*Who is responsible for monitoring and reporting on fees and fundraising in schools in your school division? How do you identify families in need in your school division? How do you support them? Do you report on fees and fundraising to parents/guardians with children attending school in your school division? Who is responsible for this?*

Boards of education and administrative authority and responsibility are addressed in this section. To better understand the importance of this issue, two contrasting stories are presented here. In one, the responsibility and authority for governance is exercised and in the other, it is left to chance.

*What steps did the Marigold Park board of education take to ensure that their processes for calculating student fees and planning fundraising activities were equitable, transparent and consistent throughout the school division?*

#### Scenario One

School fees and fundraising were discussed at a recent meeting of the Marigold Park School Division board of education. The director of education, Mr. White, reported on annual expenditures in both areas. While reviewing records provided to board members, Mr. White noted that the rise in fees at Marigold School and Petunia School was due to the introduction of a new program and the reporting process that had been used to inform parents/guardians. He also observed that ten students and their families had benefited from the “equity fund” established to cover costs for families in need.

His outline of fundraising undertaken over the course of the school year revealed that schools in the division had followed board guidelines and that parents/guardians, students and other interested parties had received reports for both major (school-wide) and minor (classroom or interest group) fundraisers. Mr. White concluded his report by noting that several parents had called his office expressing satisfaction with the new reporting process. Parents were pleased that it was easy to see how the fees they paid on behalf of their children were being used and the benefits their schools had derived from fundraising efforts.

*What steps could the Peony Flats board have taken to ensure that all schools in the school division had a consistent and transparent process for school fees and fundraising projects?*

#### Scenario Two

In May, Mr. Jones came to the Peony Flats Board of Education with a complaint regarding school fees. Mr. Jones explained that over the last eight months of school, his family had contributed \$425.00 in ‘fees’ to cover costs associated with schooling. He noted that a friend with children attending a different school in the division had paid only \$270.00 in the same period.

He wanted the board to provide him with last year’s “fee list” for grade 3 and grade 6 in both schools. He also wondered how decisions surrounding school fees were made in the school division.

The board explained that ‘fee lists’ were not available for individual grades or schools and that decision making regarding school fees was determined by individual teachers and schools. Furthermore, the board had never had a complaint of this nature before and believed that teachers and schools always tried to keep fees ‘reasonable’.

*Should the Peony Flats board have provided Mr. Jones with the information he wanted? Why or why not?*

*If Mr. Jones asked the same question in your school division, how would you respond?*

It is important to be aware of how fees and fundraising in our schools affect the quality of education provided. Educational stakeholders have a right to know how fees and monies raised through fundraising are being used. It is important to address equity issues, emphasizing the belief that all students should have the opportunity to participate equally in school-sponsored events. In these two scenarios, we raised the issue of educational benefit or ensuring that learning objectives and the beliefs and goals of the school are kept in mind when fundraising activities or other activities requiring the collection of fees are considered. We also addressed the issue of governance and suggested that the boards of education have the responsibility and the authority to oversee all aspects of school fees and fundraising.

The next section reviews the origins of boards' responsibility and authority regarding the issues and then considers how boards may choose to express leadership in this area.

## *Fees, Fundraising and Fairness: Expressing Leadership through "Policy Governance"*

Boards have not only the responsibility but also the authority to maintain accountability regarding 'costs' associated with school fees and fundraising. The origins of that authority and the responsibilities that arise from it need to be considered. These responsibilities provide boards with the opportunity to express leadership through 'policy governance'.

## *Duties and Responsibilities: The Education Act, 1995*

*The Education Act, 1995* describes the rights and responsibilities of students and board members and provides boards of education with the authority and entrusts them with responsibility regarding the collection and administration of school fees.

Section 87 of *The Education Act, 1995* provides boards of education with the authority to collect school fees.

*If costs associated with school fees and fundraising are not being carefully monitored by all concerned, how do we respond when parents/guardians, students or others ask us how much they will be expected to pay, what they will be paying for and why they will be paying? How will we know if such costs are interfering with learning opportunities for some students if we don't have clear reporting systems?*

*In your school division, who is entrusted with the authority and responsibility to respond to issues related to school fees and fundraising?*

## *P*owers of the Board of Education

*In your school division, whose responsibility is it to account for monies collected through fees and fundraising?*

### *Section 87*

- v) *Provide for the collection of a reasonable sum from pupils for:*
- ii) *The purposes of fees or dues with respect to student organizations and related activities approved by the school.*

Section 85 of *The Education Act, 1995* underlines their responsibility in this area. It declares that boards of education are responsible for auditing the books and accounts of the school division.

## *D*uties of the Board of Education

### *Section 85*

- 1) *[s] appoint, not later than March 1 in each year, one or more persons or a company or partnership to audit the books and accounts of the school division.*

*What might be the repercussions of the situation described in this scenario? How could this situation have been prevented?*

*If your board faced a challenge regarding school fees or fundraising, would you be able to provide an accurate account of what fees and funds were collected, why they were collected or raised and how they were used?*

Consider this scenario:

Last year a high school football coach charged players \$110 in fees and held two fundraisers to offset team costs. To save the expense of opening a new bank account, the coach placed these collected and raised monies in his personal account for safekeeping. He kept a record of transactions in his filing cabinet at the school. However, he transferred to another school in the division at the end of the semester and during the move his record of transactions was lost.

## *R*ight to Education

Section 141 of *The Education Act, 1995* affirms the right of every student from the age of six to twenty-one years of age to attend school and receive appropriate instruction.

### *Section 141*

*Subject to sections 154 [suspensions], 155 [expulsion] and 157 [expectations for school attendance], no teacher trustee, director or other school official shall, in any way deprive, or attempt to deprive, a pupil of access to, or the advantage of, the educational services approved and provided by the board of education or the conseil scolaire.*



In reviewing these sections of *The Education Act, 1995*, we can see that while it is clearly good practice to keep track of funds associated with school fees and fundraising, there are also legal reasons why boards need to take their responsibility in this area seriously.

*How might consistent reporting of why fees are collected and funds are raised and how such monies are used help avoid legal challenges?*

The right of school boards to collect school fees has been questioned in several jurisdictions in recent years. One example of this was a dispute between two Meath Park parents and the Saskatchewan Rivers School Division Board of Education. Two parents asserted that parents should not be held responsible for school fees charged for compulsory classes. When they refused to pay the fees the school charged, their children initially ‘sat out’ while fellow students engaged in the practical aspects of the coursework (those aspects of the course requiring materials). The issue was resolved when a third party agreed to pay the fees (see *Prince Albert Herald*, November 6, 2001 for a report describing this dispute).

*How would you have resolved the issue? What might boards do to avoid such issues arising?*

## *Policy Leadership*

Most Saskatchewan boards of education provide direction regarding practices that fall under their jurisdiction through legislation or practice through policy leadership<sup>4</sup>. They accomplish this by developing policies that describe the results that they want to achieve. However, policy leadership involves more than writing policies; it also involves policy governance, or “holding hired staff responsible for implementing policy and regular monitoring to be sure that the objectives of the policy are being achieved” (Policy Leadership, SSBA Research Centre Report #99-09, 1999).

*How might your board address issues related to school fees and fundraising through policy leadership?*

## *Policy Governance*

In recent years, Saskatchewan boards of education have moved toward using the policy governance model<sup>5</sup> to express policy leadership. In the policy governance model, the board defines through policy the ends it wishes to achieve. The board also establishes limitations on management authority and defines the governing process. The director of education then defines and implements the means of achieving the ends and reports to the whole board and the whole board provides direction (A Pathway to Effective Board Policy Development, SSBA Research Report #0209, 2002, p. 10).

*A policy statement that focuses on results might read something like this: “Our purpose as a public education system is to provide for all children to learn to the best of their ability and to take part fully in a democratic society. The school system shall ensure that quality learning is available to each and every one of our students.”*

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<sup>4</sup>For more information on issues related to the development, implementation and monitoring of board of education policy see: Policy Leadership, SSBA Research Centre Report #99-09, 1999.

<sup>5</sup>For a review of the policy governance framework see: A Pathway to Effective Board Policy Development, SSBA Research Report #0209, 2002).

Usually policies that specify the results that a board wants to achieve begin with a general statement concerning the desired results and then add specific information about priorities or objectives (Policy Leadership, SSBA Research Centre Report #99-09, 1999). In Alberta, where school fees and fundraising have also become an issue, the Alberta School Board Association (ASBA) asked boards to develop a “perfect policy” on school fees and fundraising<sup>6</sup>. Descriptions of the “suggested policy statement and guidelines” on school fees and fundraising that reflect the feedback the ASBA received from member boards on school fees and fundraising follow:

## *Suggested Policy Statement – School Fees*

The board recognizes that it may be necessary for schools to establish a fee schedule for specific courses or school-related activities, projects or items.

In adhering to the commitment that education is free and available as a matter of right, fees should be kept as low as possible and the following guidelines should be followed in the setting of fees.

## *Suggested Guidelines – School Fees*

1. School board policy should guide schools in setting school-based fees (fees for “non-basic” education items such as the purchase of a novel for class study, extra-circular programs, etc.).
2. School-based fees should be set in consultation with school principals, staff, school advisory council and parents.
3. School-based fees should be the same in each school offering similar materials/programs throughout a school division.
4. School fees should be used only for the purpose for which they were collected and should be directly related to the cost of supplies or materials provided to students.
5. Schools requesting fees for certain programs should provide a rationale for the fee, communicate with their school community about the need for the

*The importance of keeping accurate records and communicating with the school community is highlighted here. We discussed both issues in Section 1 (see monitoring and transparency). We also touched on them when we reviewed The Education Act, 1995 in this section. If you were writing policy for your board, would you include a similar statement? Why or why not?*

*The directive in #5 relates to the issue of monitoring that we discussed in Section 1. Would you include a similar statement if you were writing a policy for your board? Why or why not?*

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<sup>6</sup> “Responding to public concern over the subject of school fees, the ASBA set up a committee to study the issue, consult with boards and develop a policy advisory. The committee selected samples of policies from boards across the province and information from jurisdictions across the country. The committee also sent a discussion guide to boards outlining the issue and asking for feedback on a “perfect” policy on school fees” (“Fees and Fundraising” [www.learning.gov.ab.ca/quicklinks/feesFund.asp](http://www.learning.gov.ab.ca/quicklinks/feesFund.asp)).

fee and have accurate record keeping in place to show that the monies collected went to support the program for which they were intended.

6. There should be a provision for fees to be waived for students whose families cannot afford to pay them. No student should be prohibited from participation. The existence of these provisions should be clearly communicated to school, staff and parents.

Responding to public concern over the subject of school fundraising, the ASBA also asked boards to develop “perfect policy” on fundraising. The following “suggested policy statement and guidelines” reflect the feedback the ASBA received from their boards on school fundraising.

## *Suggested Policy Statement – Fundraising*

The board recognizes that generating additional revenue in support of programs can enhance educational services for students.

Funds raised should be used to benefit students, enhance quality and relevance of education for learners and contribute to the development of responsible citizens.

Fundraising activities must be compatible with the best interests of the students, school staff and community and not detract from curricular activities.

*This guideline is related to the issue, “barriers to learning” that we discussed in Section I. Would you include a similar guideline if you were writing a policy? Why or why not?*

## *Suggested Guidelines: Fundraising*

1. Funds raised should complement – not replace – public funding for education.
2. Fundraised dollars should not be used for instructional purposes or basic education items that are required to complete a core course.
3. Decisions on fundraising activities and the expenditure of fundraised dollars should be made in consultation with school principals, staff, students, school councils and parents/guardians. Fundraising goals should be developed in advance of the fundraising activity.

*Who makes the fundraising decisions in your school? Are decisions made in consultation with others (such as staff, students, parents/guardians, and school councils)? Are there guidelines in place to support decision makers?*

4. Participation in fundraising activities should be voluntary. No student should be excluded from an event or program because his or her parent did not contribute.
5. Parents should approve of student participation in fundraising activities. Students should not be put at risk in participating in fundraising activities.
6. Schools should be required to maintain a record of revenue and expenditures for all school-sponsored revenue-generating projects and keep on file a financial statement for each project.
7. An accounting of the income and expenditures related to school fundraising activities should be forwarded to the board.
8. Accountability for fundraised dollars contributed to a school generally rests with the school board.

## *School Fees and Fundraising “Review”*

You have reviewed some of the major issues, considered the legislation and read a sample of policy. Hopefully you have also engaged in some meaningful discussion related to school fees and fundraising. You might also be interested in reviewing some of the issues we have discussed.

*Do the schools in your school division have an accurate record of all monies raised through fundraising? Why does this matter?*

*Is your board given an accurate accounting of income and expenditures related to fundraising? Why is this important?*

1. *Do you think it is the responsibility of board members to deal with issues surrounding school fees and fundraising? Why or why not?*
2. *Does your board keep accurate records regarding school fees and monies taken in through fundraising? Would educational stakeholders, such as parents/guardians, teachers and others, find these records easy to access and easy to understand?*
3. *Do you know if costs associated with school fees and fundraising have created hardship for families in your division? How do you know? If you are aware of such hardships, what have you done about it?*
4. *Do you know if fundraising practices and activities for which fees are charged are in harmony with your school/school division goals and beliefs and instructional objectives? How do you know? Is this even important?*

5. *Do you know how much time, on average, parents/guardians, students, teachers and others spent on all fundraising last year? Based on time spent, do you think these fundraisers were worthwhile financially? Educationally?*
6. *In light of what you have learned about school fees and fundraising, do you think your school division's position on fees and fundraising needs to be clarified? If yes, what will be your next step? What are you prepared to do **right now**?*

*Do you think your board of education should be held accountable for fundraising dollars?*

# Resources

A is for Ask: A Fundraising Guide (1997). Ottawa, Ontario: Canadian School Boards Association.

Bauer, David G. (2000). Making School *Fundraising a learning experience*. Principal, 80, #2, 13-17.

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Burke, Mary Anne (October 2001). *Recruiting and Using Volunteers in Meaningful Ways in Secondary Schools*. National Association of Secondary School Principals, 85, #627, 46-52.

Mabry, Vickie (2000). *Product Fundraising: It's a Love-Hate Thing*. Principal, 80, #2, 6-12.

Maynes, W. G. (1993). *Child Poverty in Canada: Challenges for Educational Policymakers*. Canadian Review of Social Policy, 32, 13-28.

Molnar, Alex (2000). *Looking for Funding in All the Wrong Places*, Principal, 80, #2, 18-21.

Payne, Ruby. (2000). A Framework for Understanding Poverty. Aha Process Inc.

Planning for Action – Equity in Education: An Implementation Handbook for “Our Children, Our Communities and Our Future”. (2001) [www.sasked.gov.sk.ca/kpeccs/h/pp/publications.html](http://www.sasked.gov.sk.ca/kpeccs/h/pp/publications.html)

Stephens, K.R., Karnes, Frances A. & Samel, Ben R. (2000). *Finding the Funding: A Principal's Guide to Fundraising*, Principal, 80, #2, 22-27.

Working Together Toward School<sup>Plus</sup>: Parent and Community Partnerships in Education Handbook (2002). [www.sasked.gov.sk.ca/k/peccs/branch/pub.html](http://www.sasked.gov.sk.ca/k/peccs/branch/pub.html)

# Appendix A

## School Fees Information Gathering Project

Weekly School Fee Worksheet

Date: \_\_\_\_\_ to \_\_\_\_\_

Student's Grade: \_\_\_\_\_

Region (Urban or Rural): \_\_\_\_\_

<b>Item</b>	<b>Quantity</b>	<b>What for? (class, school activity, fundraising event)</b>	<b>Cost (\$, time)</b>	<b>[Impact] Describe any difficulties or concerns that this fee or activity caused (e.g., babysitting, transportation, impact on other family expenditures/needs)</b>

<p>Describe any school fees or school activities costs that you chose not to pay. Describe any school activities or school events that you and/or your child did not participate in.</p>	<p>[Impact] Please list the reasons why you chose not to pay a fee or participate in a school activity.</p>



## Appendix B

### Examples of Some School Fees

Categories of Fees	Examples
Basic School Supplies	Binders Book Bag or Backpack Calculators Dictionary Dividers Duotangs Erasers Felt Markers Geometry Set Glue Highlighters Loose Leaf Paper Notebooks/Scribblers Pencil Case Pencil Crayons Pencil Sharpener Pencils Pens Rulers Scissors Thesaurus
Band	Picks Reeds Rental of Musical Instruments Strings Music Books/Folders
Computer Supplies	Diskettes Paper
Field Trips	Accommodation Entrance Fees Equipment Rental Chaperoning Meals Transportation
Fundraising	Bake Sale Bingo Driving Selling Fruit, Meat, Cookie Dough, etc. Time Off Work

<b>Categories of Fees</b>	<b>Examples</b>
Graduation	Cap/Gown Rental Graduation Fee
Gym	Running Shoes Safety Equipment Shorts Sweats T-Shirts
Materials used in Student Projects	Art Supplies Home Economics Supplies Woodworking Supplies
School Photographs	School Photograph Fee
School Sports Team	Football Uniform Sports Equipment Transportation
Special Events or Activities at School	Activity Pass Pizza Lunch Hot Dog Sales
School Yearbook	School Yearbook Fee
Textbooks/Workbooks/Photocopying	Textbook Rental