Preparatory Students Visit a Hawaiian Home for Thanksgiving
(November, 1948)

KMS Make A Difference Day
Cleaning Kalihi Stream
(October, 2006)
Importance of Sound Fiscal Management

Individuals such as the team money manager, the club and class advisor play an important role in safeguarding the school’s tax exemption status. KMS must comply with all financial policies set forth by the federal government or risk losing its tax exempt status. Policies are based on “common sense” and sound money management principles.

At the request of KS, an internal audit was completed at all Kamehameha Campuses during the 2004 – 2005 school year. Specific recommendations were made based upon the audit and are to be followed. The Activities Coordinator will assist all individuals handling finances in understanding and following the guidelines.

This guidebook is intended to reduce confusion and anxiety. Please keep in mind that KS policies are subject to change. As policy are updated or changed, you will be notified to make the necessary changes to the reference pages. If you have any questions about the forms or about the policies, please call the Student Activities Office at 843-3476.

Mahalo! for your willingness to take on this role.
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INTRODUCTION

Student Activity Goals and Standards
Benefits of Participation in Student Activities
KMS Student Activities

The Student Activities Program at KMS seeks to meet the educational, emotional and spiritual needs of student learners by following the CADA/CASL (California Association of Directors of Activities & California Association of Student Leaders) and KS Educational Policy and Procedures.

**Goal:** the goal of the KMS Student Activities Program is to provide opportunities and experiences for students to develop as “servant leaders” and become “good and industrious” young men and women.

**Objectives:** The objectives of the KMS Student Activities Program are to provide students the opportunities to:

- Develop leadership potential through planning, implementing, evaluating and participating in events, activities, service projects, retreats, conferences, school exchanges, etc.
- Develop personal interests and talents through participation in clubs and student government.
- Develop personal and social relationship skills through social activities such as dances, picnics, banquets, Founder’s Day Ceremonies, etc.
- Develop as contributing and participating members of society through participation in elections, legislative experiences, committees, visitations, conferences, and other events.

**Kamehameha Schools Strategic Plan Goals:**

**Goal 1:** Kamehameha Schools will provide and facilitate a wide range of integrated, quality educational programs and services to serve more people of Hawaiian ancestry.

**Goal 2:** Kamehameha Schools will work with families and communities in their efforts to meet the educational needs of people of Hawaiian ancestry.

**Goal 3:** Kamehameha Schools will cultivate, nurture, perpetuate, and practice ‘Ike Hawai’i and wahi pana.

**Goal 4:** Kamehameha Schools will foster the development of leaders who focus on service to others.

**Goal 5:** Kamehameha Schools will optimize the value and use of current financial and non-financial resources and actively seek and develop new resources.

**Goal 6:** Kamehameha Schools will mālama i ka ‘āina: practice ethical, prudent and culturally appropriate stewardship of lands and resources.

**Goal 7:** Kamehameha Schools will continue to develop as a dynamic, nurturing, learning community.
**Kamehameha Schoolwide Learner Expectations**

Ke Ala Pono: As a Kamehameha student I will become a good and industrious person by developing my spirit, mind and body and by using my talents and abilities to make the world a better place, following the wishes of our beloved Founder Ke Ali‘i Bernice Pauahi Bishop.

<table>
<thead>
<tr>
<th>World</th>
<th>Spirit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand that my responsibilities extend beyond self and family to include multiple communities: school, workplace, neighborhood, state, national and global</td>
<td>Respect God and all of God’s creation</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Body</th>
<th>Mind</th>
</tr>
</thead>
<tbody>
<tr>
<td>Behave in ways that show respect of my body and its connections to mind and spirit</td>
<td>Commit to acquiring the knowledge, skills and experience needed to use my mind responsibly and effectively</td>
</tr>
</tbody>
</table>

**CADA/CASL Standards**

1. Communication
   - 1.1 Written Communication
   - 1.2 Interviewing Skills
   - 1.3 Public Speaking
   - 1.4 Crowd Control
   - 1.5 Conflict Resolution
   - 1.6 Creative Thinking
   - 1.7 Evaluation
   - 1.8 Interpersonal Skills

2. Personal & Social Development
   - 2.1 Group Dynamics
   - 2.2 Goal Setting
   - 2.3 Interpersonal Skills
   - 2.4 Self Esteem/Self Awareness

3. Government
   - 3.1 Government Hierarchy
   - 3.2 Procedures
   - 3.3 Elections
   - 3.4 Organizations
   - 3.5 Effective Meetings

4. Service Learning
   - 4.1 Presentation Skills
   - 4.2 Community Service
   - 4.3 Citizenship

5. Business
   - 5.1 Marketing
   - 5.2 Finance/Accounting
   - 5.3 Advertising
   - 5.4 Customer Service
   - 5.5 Communication
   - 5.6 Business Law
<table>
<thead>
<tr>
<th>Student Benefits of Participation in Student Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Participants</strong></td>
</tr>
<tr>
<td>------------------</td>
</tr>
<tr>
<td>No unexcused absences</td>
</tr>
<tr>
<td>Maintain 3.0 GPA or higher</td>
</tr>
</tbody>
</table>


“...co-curricular activities appear to provide all students at risk and gifted students alike, an academic safety net.” (Edward Klesse, E. & Jan D’Onofrio. Student Activities for Students at Risk. Veston, VA: NASSP, 1994.)

- Participation in student activities has a positive correlation with increased levels of self esteem.
- Student activities may serve as a source of attachment to school for academically challenged students
  (Leadership for Student Activities, Jan. 2005. Vol. 33. No.5.)

Student responses to club and leadership participation
- “I learned the meaning of servant leadership which is being a leader or taking the lead to serve others.”
- “It has helped me to be more honest about things and put a step forward to be different.”
- “I learned to put other before myself and I learned how to plan and be organized....it gives me a sense of pride.”
- “If you are scared to try something, just think what would I be doing if I wasn’t scared.”

Club Advisors benefit by:
- Having an opportunity to work with a wider range of students in a non-academic setting.
- Being able to mentor students and build meaningful relationships.
- Having an opportunity to pursue personal interests and introduce students to a broader spectrum of experiences and interests.
PROTECTION OF PERSONALLY IDENTIFIABLE INFORMATION (PII)

Do
Collect PII only when required.
Limit access to PII to those with a need – to – know.
Keep PII in locked files and cabinets.
Lock your computer screen <alt – ctrl – del> when leaving your workstation.
Log off your computer at the end of the day.
Shred all sensitive print materials of dispose of in shredding consoles.
Redact or encrypt PII before sending it outside KS.
Discretely discuss PII if you are in open areas.
Immediately report actual or suspected PII breaches to your VP or Education Head.

Don’t
Don’t Dispose of PII in trash cans or dumpsters.
Re-use PII documents as scratch paper, copy paper or fax paper.
Dispose of “official” KS records containing PII in shredding consoles (see Policy 630).
Email PII unless the message is encrypted.
Store PII on laptops or portable storage media unless the device is encrypted.
Store PII on home computers or other personal electronic devices.
Store PII in locations accessible to others.
Take PII out of the office without supervisor’s prior approval.
Use your authorized access to PII for other than KS business purposes.

Got questions? Call 842-8555, or email strezent@ksbe.edu
CASH CONTROLS

1. Never leave cash or checks unattended or in a file cabinet, desk drawer, etc. overnight. Never take home cash or checks. The student activities office has a safe.

2. Deposit all cash and checks immediately to the cashier’s office at the administration building, drop box at the administration building (call the cashier’s office at .... To inform that an evening drop has been made), or to student activities center safe. Call the student activities office at 843-3476 before making a drop.

3. Maintain supporting documentation for cash sales and reconcile items sold to sales proceeds. Store sales records and records of receipts separately from cash and checks.

4. Document all expenses with original receipts

5. Avoid making checks payable to yourself.

6. Use a log listing payer, check number and amount paid instead of making copies of checks received.

7. Maintain a log of all payments received from parents/guardians.

8. Secure approval for fundraising events at least two weeks prior to the event.

9. Submit fundraising reports, supporting documents within two weeks AFTER the event has ended. Failure to do so may result in ability to hold future fundraisers.

10. Submit cash-register tapes form concession sales with fundraising reports.

11. Reconcile club banking accounts monthly.
HOW DO I FORM A CLUB?

1. Inform the Student Activities Office that you are interested in forming a club and complete the Club Sanctioning Form. (Each club must sanction yearly with the Associated Students of KMS in order to fundraise and use KS facilities.)

2. The club’s purpose and goals must conform to KS Strategic Goals.

3. Attend the “Club Fair” to advertise your club and gain members.

WHAT ARE MY RESPONSIBILITIES AS A CLUB/CLASS ADVISOR?

The Advisor(s) of the club will:

- Apply for and receive Club Sanctioning yearly.
- Complete the “End of the Year Report”, giving an overview of the club’s activities and accomplishments during the school year.
- Complete “Service Initiative” form for each service initiative undertaken during the school year.

IF THE CLUB/CLASS MAINTAINS A FINANCIAL ACCOUNT (OPTIONAL)

- Follow all PII Guidelines, Cash Controls and other KS fiscal policies.
- Complete the “End of the Year Financial Report”.
- Complete monthly reconciliation of finances, using monthly statements provided by the Student Activities Accountant.
- Fundraisers (optional)
  - Complete “Request for Fundraising” at least two weeks PRIOR to your proposed fundraiser.
  - Deposit cash/checks immediately with the student activities office and complete the appropriate deposit form.
  - Complete the “Fundraising Collection Report” within two weeks of the completion of the fundraiser. Failure to do so may result in the immediate revocation of fundraiser privileges for the rest of the school year.

- Submit necessary paperwork for “Cash Advance”, “Check Request” with necessary original documentation. (For check and cash advance requests, please allow at least 7 – 10 working days for processing.)

- ALL financial requests, and deposits are to be submitted to the student activities department for review and approval. Documents that are submitted directly to the student activities accountant that have not been approved by the SAC office will NOT be processed.

- Report any discrepancies or concerns immediately to the student activities office.
WHAT ARE MY RESPONSIBILITIES AS THE TEAM MONEY MANAGER?

- Follow all PII Guidelines, Cash Controls and other KS fiscal policies.

- Complete the “End of the Year Financial Report”.

- Complete monthly reconciliation of finances, using monthly statements provided by the Student Activities Accountant.

- Deposit cash/checks immediately with the student activities office and complete the appropriate deposit form.

- Submit necessary paperwork for “Cash Advance”, “Check Request” with necessary original documentation. (For check and cash advance requests, please allow at least 7 – 10 working days for processing.)

- ALL financial requests, and deposits are to be submitted to the student activities department for review and approval. Documents that are submitted directly to the student activities accountant that have not been approved by the SAC office will NOT be processed.

- Report any discrepancies or concerns immediately to the student activities office.
We, the undersigned students of Kamehameha Middle School, desire to form a club. We understand that in order to use Kamehameha facilities and to be considered for fundraising opportunities each club must receive sanctioning approval from the Associated Students of Kamehameha Middle School Council.

By completing the Club Charter Form we are initiating the Club Sanctioning Process. Each Club Charter submitted will be considered at the first convening of the Associated Students of Kamehameha Middle School. Clubs will be notified by written letter about their approval. Clubs denied sanctioning will be asked to make the necessary changes to the charter form.

Date Received: _______________________________

Approved: ________
Disproved: ________

Recommendations to meet Sanctioning Requirements:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Article I
This organization shall be known as:

Article II
Section I – Club Purpose or Goals
“Kamehameha Schools is grounded in the Christian and Hawaiian values embraced by Ke Ali‘i Pauahi.” The aims and purpose of this club shall be in alignment with KS Strategic Goals:

• SG #3 – KS will cultivate, nurture, perpetuate and practice 'Ike Hawai‘i
• SG #4 – KS will foster the development of leaders who focus on service to others
• SG #6 – KS will mālama i ka ‘āina: practice ethical, prudent and culturally appropriate stewardship of lands and resource
• SG #7 – KS will continue to develop as a dynamic, nurturing learning community

(State the purpose or goal of the proposed club below)

Section II - Service
The club will complete one service learning project during the school year and complete a “Service Evaluation” at the end of the school year. Suggested service day is October 20, 2007.

Types of service that the proposed club would like to perform are:

Article III
The qualifications for membership to which every member must confirm are as follows:
Article IV

Section I – Club Officers
The officers and their duties shall be as follows (Give a brief description). Officers are not required.

<table>
<thead>
<tr>
<th>Office</th>
<th>Duties</th>
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</tbody>
</table>

Section II – Officer Selection
The officers are chosen by: __________________________________________________

Section III – Standing Committees
The standing committees of this organization shall be as follows:

<table>
<thead>
<tr>
<th>Committee</th>
<th>Purpose</th>
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Article V

Section I – Regular Meetings
Regular meetings of this organization shall be held:
Section II – Special Meetings
Special meetings shall be called when and by whom?

Section III – Meeting Location
The meetings will take place: (List Location) ______________________________

Article VI
Section I - Dues
The dues of this organization shall be (Dues are optional):

Section II – Purpose of Dues
The purpose(s) for which dues will be collected are: _______________________

Article VII
Section I - Activities
The tentative plans for activities this year include:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Date</th>
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</table>
Article VIII

Section I – Advisor’s Role

The Advisor(s) of the club will complete:

- **End of the Year Report**, giving an overview of the club’s activities and accomplishments during the school year.
- **Service Evaluation**, giving an overview of the club’s service to the school and community during the school year.
- **End of the Year Financial Report** (each club is required to complete this form)

*Fundraisers (optional)
- **Request for Fundraising** form at least two weeks prior to the proposed fundraiser.
- **Fundraising Collection Report** within two weeks of the completion of the event.

*Travel (optional)
- A proposed Travel Request, stating goals/objectives of the trip, tentative itinerary, estimated student attendance and chaperones necessary and estimated costs. (At least three bids for travel should be obtained.) The Travel Request will be considered by the Principal and Student Activities Coordinator for approval.

I have read and understand my responsibilities as stated in the Advisor’s Role memorandum and I agree to sponsor this organization.

_____________________________   ______________________
(Advisor’s Signature)   (Date)

I hereby submit the above Charter for approval to the Student Council of the Associated Students of Kamehameha Middle School.

_____________________________   ______________________
(Club President’s Signature)   (Date)

The list of members is for the school year 20 _______ to 20 _________.

16
## Associated Students of Kamehameha Middle School

### Club Charter – Club Officers

<table>
<thead>
<tr>
<th>Officer Name</th>
<th>Position</th>
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</tbody>
</table>

**Advisor(s)**

- Name: ___________________________ Extension: ____________
- Name: ___________________________ Extension: ____________
- Name: ___________________________ Extension: ____________

**Club Members**

<p>| | |</p>
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</tbody>
</table>

8/03 – Revised 8/05
Please Open an Account

Club’s Purpose: ________________________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________

Advisor: ________________________________________________________________
(Print Name) (Signature) (Phone) (Email)

has signed a statement acknowledging the forms and procedures pertaining to the use of a
Kamehameha Schools student activities account will be adhered to as outlined in the Student
Activities Handbook.

Please Close our Account

Account # ______________________

Reason for closing account: __________________________________________________
_____________________________________________________________________________

Instructions for Remaining Funds: __________________________________________________
_____________________________________________________________________________

Approved by: ________________________________________________________________
(Dean of Student Activities/Student Activities Coordinator) (Date)
MANAGEMENT OF FINANCIAL ACCOUNT

1. Check Request
   - Please use this form for all check requests.
   - Provide adequate details when completing this form.
   - Provide original receipts, invoice, etc.
   - All requests must be submitted to the student activities office.
   - Please allow adequate lead time – 7 to 10 business days for processing.
   - Upon receipt of check, sign the notation portion and return to the student activities office.

2. Cash Advance
   - Please use this form for all cash advances.
   - Cash advances should be made ONLY in situations in which a check request could not be used.
   - Requestors must present the approval form in person to the student activities account for receipt of the cash requested.
   - Requestors MUST submit original receipt for the product/service received to reconcile the cash advance request.
   - Requestors are to reconcile the transaction by returning change to the account with the appropriate deposit form. Or, if the cash advance request was insufficient, and the requestor paid additional money out of pocket, an original receipt for the additional funds must be submitted for reimbursement through a check request.

3. Deposit Form – (For deposit of NON-fundraiser monies)
   - Use this form for all non-fundraising deposits.
   - Non-fundraiser deposits are not subject to the state general excise tax.
   - Please accurately list the deposit source (dues, parent assessment, etc.)
   - If it is a check for deposit, please list the payer, the name of the student (if it for a student account), and the check number.
   - Remember to follow PII.
   - Use and include the Money Verification Form with your deposit.

4. Fundraiser Deposit Form
   - Use this form to deposit ALL fundraiser money.
   - Fundraiser deposits are subject to state tax and will be paid by the student activities accountant. No action is necessary.
   - Keep accurate records of product sold, lost, etc.
   - Keep accurate records of product wholesale and retail costs.
   - Keep original receipts, invoices, etc. for items related to the fundraiser.
   - Remember to follow PII.
   - Deposit fundraiser monies immediately to the KS Cashier, KS Drop Box at the administration building or the SAC safe.
   - Use and include the Money Verification Form with our deposit.

5. T-Shirt Deposit Form
   - Use this form when collecting money for T-shirts.
   - Use and include the Money Verification Form with our deposit.

(See sample forms on pages 21 – 25. All forms are in type-able format on the SAC Blog—http://blogs.ksbe.edu/kmssac/)
KAMEHAMEHA SCHOOLS STUDENT ACTIVITIES – KAPĀLAMA
CHECK REQUEST FORM

Date: ________________  Account #:__________________  □ Athletics Department
   □ Elementary School, Rachel Lee
   □ Middle School, Student Act Ctr
   □ High School, Student Act Ctr

Name: ____________________________________________

Club: ____________________________________________

Check payable to: ________________________________
   □ Payment
   □ Reimbursement

Address: ____________________________________________________________________________

City, State, Zip: _____________________________________________________________________

<table>
<thead>
<tr>
<th>Event Description</th>
<th>Amount</th>
<th>Expense Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Senior Lūʻau</td>
<td></td>
<td>Events-meals</td>
</tr>
<tr>
<td>Car wash fundraiser</td>
<td></td>
<td>Fundraiser supplies</td>
</tr>
</tbody>
</table>

*Payment made to other KS Student Activity Clubs will not generate a check; process will occur as an internal transaction.*

**All original invoices and receipts are attached.**

TOTAL ____________

Approved by: ____________________________________________
   (Advisor)  Print Name  Signature  Date  Phone/Email

Approved by: ____________________________________________
   (Department Head)  Print Name  Signature  Date  Phone/Email

   ***If amount is more than $1,000.00, second approval by Department Head required***

Approved by: ____________________________________________
   (Dean of Student Activities/Student Activities Coordinator)  (Date)

   ****If amount is more than $5,000.00, approval by Student Activities Dean/Coordinator required****

By your signature, you are certifying that you have reviewed the transaction and related documentation and they conform to Kamehameha Schools (KS) policy and that the transaction is within budget, free from known conflict of interest and in the best interest of KS.

For KSSA Office Use Only

Expense Acct:  

Date:  Amount:
KAMEHAMEHA SCHOOLS STUDENT ACTIVITIES – KAPĂLAMA
CASH ADVANCE FORM

Date: ____________________  Account #: ____________________

Name: ____________________
Club: ____________________

Check payable to: ____________________
Address: ____________________
City, State, Zip: ____________________

<table>
<thead>
<tr>
<th>Event</th>
<th>Description</th>
<th>Amount</th>
<th>Expense Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Senior Lū‘au)</td>
<td>(Food) (Car wash supplies-soap, towels, buckets)</td>
<td></td>
<td>(Events-meals) (Fundraiser supplies)</td>
</tr>
<tr>
<td>(Car wash fundraiser)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*All original invoices and receipts are attached. All change to be reimbursed to Student Activities accountant.*

TOTAL ____________

Approved by: ____________________
(Advisor)  Print Name  Signature  Date  Phone/Email

Approved by: ____________________
(Department Head)  Print Name  Signature  Date  Phone/Email

Approved by: ____________________
(Dean of Student Activities/Student Activities Coordinator)  (Date)

**Cash Advance requires approval by the Club Advisor, Department Head, and Student Activities Dean/Coordinator**

By your signature, you are certifying that you have reviewed the transaction and related documentation and they conform to Kamehameha Schools (KS) policy and that the transaction is within budget, free from known conflict of interest and in the best interest of KS.

For KSSA Office Use Only

| Expense Acct: | Date: | Amount: |
**Deposit Form**

Date: ____________________________  Account #: ____________________________

Name: ____________________________

Club: ____________________________

Event ____________________________

<table>
<thead>
<tr>
<th>Cash or Check #</th>
<th>Payer</th>
<th>Student Name</th>
<th>Amount</th>
<th>Donation</th>
<th>Parent Assessment</th>
<th>Dues</th>
<th>ATP Grant</th>
<th>Other (Please provide explanation)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>Cash</td>
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<td>Cash</td>
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<td>Cash</td>
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<tr>
<td>Check (include check #)</td>
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<td></td>
</tr>
</tbody>
</table>

Cash Collected: __________________
Checks Collected: __________________
Total Amount Collected: __________________
# Fundraiser Deposit Form

<table>
<thead>
<tr>
<th>Name:</th>
<th>Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Club:</td>
<td>Acct #:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Event:</th>
</tr>
</thead>
</table>

**Beginning Inventory**

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Cost/Item</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Cost/Item</th>
</tr>
</thead>
</table>

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<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Cost/Item</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Cost/Item</th>
</tr>
</thead>
</table>

**Total Cost**

<table>
<thead>
<tr>
<th>Check Payer (List Check #)</th>
<th>Amount</th>
</tr>
</thead>
</table>

| CASH | $ | $ | $ | $ | $ | $ | $ | $ | $ | - CASH - |

| CASH | $ | $ | $ | $ | $ | $ | $ | $ | $ | - CASH - |

| CASH | $ | $ | $ | $ | $ | $ | $ | $ | $ | - CASH - |

| CASH | $ | $ | $ | $ | $ | $ | $ | $ | $ | - CASH - |

| CASH | $ | $ | $ | $ | $ | $ | $ | $ | $ | - CASH - |

| CASH | $ | $ | $ | $ | $ | $ | $ | $ | $ | - CASH - |

| CASH | $ | $ | $ | $ | $ | $ | $ | $ | $ | - CASH - |

| CASH | $ | $ | $ | $ | $ | $ | $ | $ | $ | - CASH - |

| CASH | $ | $ | $ | $ | $ | $ | $ | $ | $ | - CASH - |

| CASH | $ | $ | $ | $ | $ | $ | $ | $ | $ | - CASH - |

| CASH | $ | $ | $ | $ | $ | $ | $ | $ | $ | - CASH - |

| CASH | $ | $ | $ | $ | $ | $ | $ | $ | $ | - CASH - |

| CASH | $ | $ | $ | $ | $ | $ | $ | $ | $ | - CASH - |

**Ending Inventory**

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Cost/Item</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Cost/Item</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Cost/Item</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Cost/Item</th>
</tr>
</thead>
</table>

**Cash Collected**

<table>
<thead>
<tr>
<th>Cash Collected</th>
</tr>
</thead>
<tbody>
<tr>
<td>$</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Checks Collected</th>
</tr>
</thead>
<tbody>
<tr>
<td>$</td>
</tr>
</tbody>
</table>

**Total Amount Collected**

<table>
<thead>
<tr>
<th>Total Amount Collected</th>
</tr>
</thead>
<tbody>
<tr>
<td>$</td>
</tr>
</tbody>
</table>

**Variance**

<table>
<thead>
<tr>
<th>Variance</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Variance Explain</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

23
# Fundraiser Deposit Form - Sample

**Name:**

**Date:** October 1, 2008

**Club:** Kamehameha Schools Club Example

**Event:** Food Sale Fundraiser

### Beginning Inventory

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Cost/Item</th>
<th>Quantity</th>
<th>Cost/Item</th>
<th>Quantity</th>
<th>Cost/Item</th>
<th>Quantity</th>
<th>Cost/Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>M &amp; Ms</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chips</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spam</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mushubi</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chicken</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bake item</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Student's Name

<table>
<thead>
<tr>
<th>Name</th>
<th>M &amp; Ms Quantity</th>
<th>Chips Quantity</th>
<th>Spam Quantity</th>
<th>Mushubi Quantity</th>
<th>Chicken Quantity</th>
<th>Bake item Quantity</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keala Smith</td>
<td>8</td>
<td>8</td>
<td>28</td>
<td>38</td>
<td>-</td>
<td>-</td>
<td>319.00</td>
</tr>
<tr>
<td>Joseph Wong</td>
<td>12</td>
<td>12</td>
<td>14</td>
<td>14</td>
<td>5</td>
<td>5</td>
<td>69.00</td>
</tr>
</tbody>
</table>

### Total

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Cost/Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>273</td>
</tr>
</tbody>
</table>

### Variance

- **Ending Inventory:** 16, 9, - 2, -
- **Actual Inventory:** 15, 7, - 2, -
- **Total Cost of Sale:** 415.00
- **Total Amount Collected:**

### Variance Explanation

Water leaked through one box M&Ms and was disposed. 2 bags of chips were smashed under boxes and were disposed.
Money Verification Form

Verifying the money count is an important step to sound financial management. After daily receipts have been recorded on the Money Collection Form, complete the Money Verification Form as a double check. It is preferable to have a second person complete the Money Verification Form.

<table>
<thead>
<tr>
<th>Collection Drive:</th>
<th>Date &amp; Collection Amount</th>
<th>Cash</th>
<th>Check</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$1.00</td>
<td>$5.00</td>
<td>$10.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Record check number (Remember PIP)
# FUNDRAISER T-SHIRT DEPOSIT FORM

**Name:** ________________________________     **Date:** ________________________________

**Club:** ________________________________     **Account #:** ________________________________

**Event:** ________________________________

Beginning Inventory: __________

<table>
<thead>
<tr>
<th>Student's Name</th>
<th>Quantity</th>
<th>Cost/Item</th>
<th>Total Cost</th>
<th>Size</th>
<th>Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>S</td>
<td>M</td>
<td>L</td>
<td>XL</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cash</td>
<td>Check (List Check #)</td>
<td>Check Amount</td>
<td></td>
</tr>
</tbody>
</table>

|                |          | $         | $          | $    | $       |

Ending Inventory: __________

Actual Inventory: __________

Variance: __________

Variance Explanation: __________________________________________

Total Quantity Sold: __________

Total Cost of Sale: __________

Total Amount Collected: __________

Signature: __________________ Date: __________ Phone/Email: ____________________________
FUNDRAISING

Policy 235C
Fundraising activities shall directly benefit the club or organization itself in the furtherance of KS’ educational mission, and shall not personally benefit the individual members.

Fund drives shall be for specific purposes and any monies collected must be used for those purposes. The purpose for the fundraising/collection of monies must be approved prior to commencement of the activity. Request approval using the Request For Approval of Fundraising Effort form.

Fundraising projects must be sensible and appropriate. The type of activity selected shall require a wide distribution of workload among the members and shall be reasonably allotted. (The full policy is available at the SAC)

On-Campus Fundraising
1. Advisors must complete the Request For Approval of Fundraising Effort form at least two weeks prior to the proposed fundraiser and have it approved by the Student Activities Coordinator. If the request is to fund student travel, prior approval for travel must have been obtained by the administrative team. Note: As a courtesy, individuals involved in fundraising for athletics that has been approved by the Dean of Students at the high school must notify the Student Activities Coordinator at the middle school if such fundraising will be done at KMS.

2. Each on-campus fundraising activity is given an exclusive selling period of not more than five (5) school days. Any exceptions must be cleared with the Student Activities Coordinator.

3. Advisors/coaches must ensure that club or team members do not sell on campus at any other time but during the five (5) school days assigned. Failure to do so may result in products and monies being confiscated and/or fundraising privileges being revoked.

4. All requests for fundraising must indicate products to be sold. Any changes must be reported to the Student Activities Center.

5. Following the fundraising activity, the advisor must complete and submit the Fundraising Collection Report form to the Student Activities Center within two weeks of completion of the event. This will ensure that the proper payment of the state general excise tax is completed by the Student Activities Accountant.

6. Groups that fundraise are asked to be observant and sensitive to the general campus area by monitoring for excess rubbish generated from the fundraiser sales.

7. Gifts should not be purchased for any individual or student using fundraised monies.

Note: Please note that money raised through fundraising efforts are considered the property of Kamehameha Schools and the school determines how the funds are to be spent. In the event of a cancellation of an activity and/or travel, any fundraised monies are non-refundable. Only parent contributions, not fundraised monies, may be returned to families.
Off Campus Fundraising

1. Fundraising is permitted off the KS campus for activities, which are sanctioned by the schools ONLY, if written permission is obtained first from the Student Activities Coordinator.

2. Advisors must complete a Request for Approval of Fundraising Effort Form.

3. When a group receives permission to fundraise off campus using the name of Kamehameha, it must make certain that no on-campus sales take place. It is the responsibility of the advisor to caution all members of this policy.

4. In the event that fundraising is done on campus, the activity for which the fundraising is taking place may be cancelled. For example, if a group which has been granted permission to fundraise off campus is raising money for a trip and a member sells on-campus, the trip may be cancelled.

5. There is no limit on the number of items a group may do off-campus fundraising activities during the school year, provided proper permission has been secured beforehand.

6. Following the fundraising activity, the advisor must complete and submit the Fundraising Collection Report form to the Student Center. This will ensure that the proper payment of the state general excise tax is completed by the Student Activities Accountant.

7. Gifts should not be purchase for any individual or student using fundraised monies.

Note: Please note that money raised through fundraising efforts are considered the property of Kamehameha Schools and the school determines how the funds are to be spent. In the event of a cancellation of an activity and/or travel, any fundraised monies are non-refundable. Only parent contributions, not fundraised monies, may be returned to families.
Individual Student Fundraising Monies

A portion of the revenues from designated fundraisers may be credited to the appropriate students’ account provided that the following is applied:

1. Monies raised must be used specifically for the purpose approved by the Student Activities Office. If the activity is cancelled, all monies must remain in the individual account and will be transferred to the group’s general fund at the end of the school year.

2. Under no circumstances shall any funds be used for non-student activities (e.g. staff stipends, parent travel, spending money, etc.). All monies are to be spent for the direct benefit of the group’s students.

3. No approval for funds to be transferred to other group functions, other students, siblings, or other activities will be allowed.

4. No individual checks will be issued to the student at the end of the school year for any remaining balances. All funds will be transferred to the general fund at the end of the school year.

5. All payments must be reconciled before any monies are credited or disbursed to the students or their accounts. This includes any balances owed for fundraising projects, returned check fees, etc.

6. In the event a student drops the class or organization, or is dismissed from Kamehameha, the student’s account will be closed and all fundraising monies should be transferred to the general fund. If a student is reinstated, funds transferred to the club’s/team’s/organization’s general fund will not be re-credited to the student’s account.

7. Fundraising monies should be used strictly to subsidize students’ required fees (airfare, food, lodging, etc.)

8. Students may not fundraise for trip “spending money” or for parent travel costs.

9. Upon completion of trip, any left over funds in the student’s account may be used for group-sponsored events for the remainder of that school year only with the approval from the Dean of Student Activities (KHS), Student Activities Coordinator (KMS), or Principal (KES).
Requirements For The Sale of Perishable Food Items

1. All perishable food items which are sold as part of a fundraising activity must be prepared in a Board of Health approved kitchen.

2. No homemade perishable food may be sold for fundraising purposes.

3. For items picked up directly by buyer from vendor (e.g. Zippy’s Chili)
   - Prior to the sale of any ticket, the advisor must secure a signed statement for the vendor indemnifying KS against any liability for complaints regarding tainted food. See attached “Fundraising Activity Release and Indemnification” form.
   - After the vendor signs indemnification form, the original must be returned to the Student Activities Office to be held on file.
   - Advisor should retain a copy for club records.

4. For food products to be distributed directly to the buyers by club members:
   - The advisor must secure written instructions from the vendor on the proper care/storage of the food to prevent spoilage or food poisoning.
   - Ensure that these procedures are strictly followed to protect KS against potential liability.

Contracts

1. Students CANNOT enter into legal contracts.

2. All contracts with vendors must be signed by:
   - The Advisor
   - The Student Activities Coordinator, if over $1000.00

3. Failure to comply with this policy will result in the advisor being held solely responsible for any losses incurred from the fundraising activity.

Securing Cash or Checks

1. Clubs, student organizations, or teams must arrange to open an account with the student activities center.

2. Cash/checks shall NOT be held overnight in office or classrooms. All cash/checks must be either deposited, left in the vault/safe in the student activities office, the KS Cashier, or KS drop box at the administration building.
Donations

If a group receives a donation from parents or outside sources:

1. A separate log of donations should be kept and submitted with the fundraising collection report (if the donation was received for a particular activity). Donations are part of your income and should be logged as such; they are not part of your expenses and should be included when calculating your GET tax.
2. Donations received for services (car wash, gift wrapping, etc.) are subject to GET tax.
3. Contribution receipt letters may be issued to individuals. Please email Brain Chang (brchang@ksbe.edu) and excel spreadsheet of the donors and amount of donation. Also include contact address and description of donation. Contribution letters will be composed and sent to you.

Club Travel & Field Trip/Overnight Outings

Refer to the SAC Blog (http://blogs.ksbe.edu/kmssac/) under “Pages” – click on “Club Field Trip/Travel Forms” for directions and type-able forms.
REQUEST FOR APPROVAL FOR FUNDRAISING EFFORT

DATE: _________________________

TO: ____________________________

FROM: __________________________________________________________________________

(Name of Group)

Account Number ______________________________
(KS Financial Account Number)

Please submit at least 14 working days prior to the fundraising event. Special consideration will be given to traveling clubs.

Purpose of Fundraising (Describe in detail):
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
(Note: Travel requests must be approved by Administration)

AMOUNT TO BE RAISED: $_______________________

Means of raising money: (Describe in detail including name of product and vendor, costs per unit, and amount at which item (s) will be sold. Items using the KSBE Seal must be approved by the Communications Department. Approval will require a proof/gally showing the proposed user, plus a full description and/or sample of any items to be imprinted, including the colors to be used.)

________________________________________________________________________________
________________________________________________________________________________

Solicitations will be made from the following groups: (Example: Friends, students, parents, etc.) Please list:
________________________________________________________________________________
________________________________________________________________________________

Solicitations will be made: _____ on campus only
(Check one)   _____ off-campus only
                 _____ on and off-campus

Approximate percent profit per unit sold ________________
We understand that no solicitation will be made of any member of the Board of Trustees of Kamehameha Schools.

**Period of Fundraising:**
Note: No more than 5 school days may be allowed for on campus fundraising.

1st Choice: From ___________ to ______________

2nd Choice: From ___________ to ______________

3rd Choice: From _______________ to ________________

**KS Services and/or Facilities required:**

Note: Work Request and Facilities Use Request Forms must be submitted upon approval. See Policy 255C “Facilities Use” and 253C “Use of Food Services or Food Services Facilities at KS Campuses” for information.

After completing the fundraising activity, a “Fundraiser Deposit Form” needs to be completed. The General Excise Tax (4.5% of the gross receipts) will be deducted and paid for by the Student Activities Accountant.

I have read the “Guidelines for Fundraising Activities” and will comply with them.

_______________________________________________  ______________________
(Advisor’s/Coach’s Signature)                     (Date)

**ACTION:**

_______________________________________________       _____________________
(Student Activities Coordinator)                                                                                       (Date)

Note: If the amount targeted to be raised by this request is $10,000.00 or more, the school administrator designated to supervise fundraising activities shall immediately send a copy of this form to the Ke Ali‘i Pauahi Foundation for its information.
Kamehameha Schools  
Kapālama Middle School  
Student Activities

**Fundraising Collection Report**

DATE: _________________________

TO: Student Activities Coordinator

FROM: __________________________________________

(Name of Group/Organization)

Account No.: ____________________

Advisor: __________________________________________

RE: Project:____________________________________

Date held:__________________________________

Gross receipts……………………………………... $___________________(A)

Note: The Kamehameha Schools Student Activities Account will pay for the general excise tax (4.5% of the gross receipts).

**EXPENSES:**

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Excise Tax</td>
<td>$___________</td>
</tr>
<tr>
<td>(4.5% of Gross Receipts)</td>
<td></td>
</tr>
</tbody>
</table>

_______________________________    _________________
_______________________________    _________________
_______________________________    _________________

TOTAL EXPENSES………………………………………..$__________________ (B)

NET PROFIT $__________________ (A-B)

COMMENTS:

Received by:____________________________ Date:____________________________

(Return completed report to the Student Activities Coordinator within two weeks of the completion of your activity)
Fundraising Activity Release and Indemnification Form

THIS RELEASE AND INDEMNIFICATION is made this _____________day of ________, 20 ______,

By: _________________________________________________________ whose business address is:  
(Vendor)

In favor of:  
The Kamehameha Schools whose business address is 1887 Makuakāne Street, Honolulu, Hawai‘i 96817.

In consideration for the promise of the following, Kamehameha Schools student organization  
______________________________________________________ to sell by ticket in connection with the  
(Name of Club)

club’s fundraising drive the following perishable food item(s) prepared and marketed by  
(Vendor)

(List Food Items): _______________________________________________________________________

for pick-up by the ultimate buyer directly from vendor between the following date(s):  
____________________________________________________________________.  Vendor hereby agrees to  
release, indemnify and hold forever harmless Kamehameha Schools and its Trustees, officers, directors,  
agents, representatives and employees, including the club and any subsidiary or affiliate of Kamehameha  
Schools, from and against all losses, claims, demands, payments, suits, actions, recoveries and judgments of  
every nature and description, including any and all attorney’s fees and costs incurred in the defense and/or  
settlement thereof, brought or recoverable against it or them by reason or in consequence of any act,  
omission, negligence, and/or carelessness and/or delivery of the food. Vendor further agrees to assume all  
risks and bear all loss or injury arising from or related in any way to the food.

Vendor has read and understands this Release and indemnification, and agrees to be bound hereby.

By ____________________________________________
KAMEHAMEHA SCHOOLS
Kapālama
Office of the President and Headmaster

[DATE]

[Donor Name]
[Donor Address]
[Donor City, State & Zip code]

Dear [Donor Name],

Mahalo nui for your generous $XXX monetary donation to Kamehameha Schools. Your donation will be applied to our Elementary School Children’s Chorus for travel to New Zealand.

Kamehameha Schools did not provide you with any goods or services in whole or partial consideration for your contribution. Please retain this letter to substantiate our receipt of your donation for tax purposes.

We sincerely appreciate your generosity and support of our educational programs.

Me ke aloha pumehana,

Brian Chang
Fiscal Administrator
Kamehameha Schools Kapālama Campus

cc: Dr. Michael J. Chun, President and Headmaster