

EEF Fundraising Event Approval Form

Please complete the following information for your EEF fundraising event. Submit the completed form to the EEF Board of Directors and Insurance Coordinator at least 90 days prior to your event date. Please reference the guidelines following for important information about EEF Events.

_____ **EUSD School** _____ **EEF Representative/Phone #**

_____ **Event Theme** _____ **Event Date & Time (Begin / End)**

_____ **Event Location**

_____ **Event Address/Phone #**

_____ **Fundraising Purpose (i.e., new programs, equipment, program consultants)**

Description of the Event and planned activities during the Event:

Will you need liability coverage for serving alcohol? _____

How many people do you estimate will be attending? _____

How many attendees will be children? _____

_____ **Event Chairperson Name / Phone #** _____ **Event Treasurer Name / Phone #**

Required signature approval from School Site Council

_____ **School Site Council President or School Principal** _____ **Date**



Encinitas Educational Foundation

101 South Rancho Santa Fe Road • Encinitas • California • 92024 • 760-944-4300 Extension 1215

Fundraising Event General Guidelines

If your event Chairperson is not a member of the EEF Board or committee, it is important that your EEF School Representative educate the Chairperson of the EEF guidelines for conducting a fundraising event through EEF. The Chairperson, or EEF School Rep, should then provide monthly communication with the EEF Board of Directors regarding your event planning. Remember that the EEF is available to provide services and assistance to all schools for event planning. You are not in this alone and EEF wants to help with your fundraising success.

Insurance Guidelines

1. To make sure your event is adequately covered, submit this Event Approval Form and allow up to 90 days prior to your event. This is necessary to allow sufficient time for the Insurance Coordinator to evaluate your event and secure proper insurance coverage.
2. If your event is at an offsite location (i.e. not at your school), such as the Encinitas Community Center, we may be required to name the location as an “additional insured” entity on our policy.
3. Also, please do not assume that all activities you plan are automatically covered by the EEF general liability policy. For example, inflatable jumpers are not covered.
4. If you are uncertain about any activities at your event, please contact the EEF Insurance Coordinator or EEF President for advice.

Finance Guidelines

1. Each event should have a Chairperson and a Treasurer to manage the financial responsibility of the event. It is especially helpful for “checks and balances” of earnings.



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2. Please provide a simple budget for the event with this Event Approval Form. That budget should include *Estimated Expenses* by category: food, decorations, entertainment, location rental fees, alcohol, printing, etc. and *Estimated Income* by category: ticket sales, sponsors, donations, auction earnings.
3. Event expenses are reimbursable immediately. Submit a Check Request form with attached expense receipts to the EEF Treasurer. Email or call the treasurer if you need to expedite your request.
4. Advance payments can be made to vendors to help you pay for items even before you raise your funds. Contact the Treasurer via email or phone to have an advance payment made.
5. Most credit cards are acceptable at EEF events. Contact the Treasurer for information about using EEF Auction Pay Services at your event.
6. Cash, checks and credit card income from any event should be counted by 2 (TWO) people (usually the chairperson and the treasurer of the event) IMMEDIATELY following the end of the event.
7. Cash, checks and credit card income should be turned into the EEF Financial Secretary for deposit to the bank account within 72 Hours after the end of your fundraising event. Use the EEF Deposit Forms found in the School Rep binder or contact the EEF Financial Secretary or Treasurer for the forms. Please remember to run an adding machine tape on checks and credit cards to show the total amounts.

