P&F Compulsory Fundraising Levy

To all parents

The St Joachim’s Parents & Friends Association plays an important role in fundraising and building a sense of community for our school. Ultimately, the P&F exists for the benefit of our school and its students, by providing a range of community building events, financially contributing to facilities and resources around the school and managing the Tuckshop and Uniform shop.

In 2016 the P&F introduced a $50 per term voluntary fundraising levy following extensive consultation with parents, Brisbane Catholic Education (BCE) and the accounts team at St Joachim’s. In June 2016 the P&F was advised the BCE accounts system could no longer support a voluntary levy issued as part of the quarterly school fees invoice. For terms 3 and 4 this year no fundraising levy will appear on the school fees invoice.

The P&F is proposing to change the levy from voluntary to compulsory starting in 2017, with a contribution of $25 per term ($100 per year per family). This contribution will provide risk-free, sustainable financial support for our school, while recognising the fact our families are increasingly time-poor.

Without a levy the P&F relies on running numerous events, including an annual Fete, and other fundraising activities such as Bunnings BBQs and chocolate drives throughout the year, which require the time and effort of parents. The number of parents able to assist with these activities continues to decline.

A P&F Levy will allow the P&F to stop constant fundraising activities and focus on supporting events and activities that help build our school community.

Parent Survey 2015

In 2015 the P&F sent a survey to all families regarding the introduction of a P&F levy. We received 127 responses with 74% of respondents agreeing a levy was an easier and more efficient way to fundraise for the school. 45% agreed that the fete should run every second year, with a focus on a fun day for the kids and community building, with a reduced focus on making a large profit. The results of the survey are attached.

Over the page are some Frequently Asked Questions regarding the levy.

Have your say....

The P&F will make a final decision on the introduction of the compulsory levy at the next P&F Meeting on Tuesday 9 August at 7pm.

The following motion will be submitted:

That the St Joachim’s P&F Association introduces a compulsory levy of $25 per term ($100 per year per family), starting in Term 1, 2017.

A vote to pass the motion or not will be put to those in attendance at the meeting. The decision will be based on a majority vote.

If you are unable to attend the P&F meeting you can state if you agree or disagree with the motion or alternatively register a person to proxy vote for you at the meeting, by emailing the P&F Secretary at:

secretary@stjpandf.org.au

If you have any questions please contact a member of the P&F Executive:

President - Kylie Hansen
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Vice-President – Natalie Arnold
nataliejarnold@gmail.com

Treasurer – Robert Lightfoot
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Secretary – Toni Brearley
tonibrearley@hotmail.com

Assistant Treasurer – Sue Holden
sfairgri@bigpond.net.au

Diocesan Rep – Matthew Campbell
mpcampbell@me.com
How much is the proposed compulsory levy?

The P&F is recommending $25 per term per family ($100 per year per family). This will provide the P&F with a sustainable income of approximately $20,000 per year.

What are other schools doing?

Of the 17 Catholic schools in this area, 14 have a compulsory P&F levy. These levies range from $80-$260 per year.

Why does the P&F need to fundraise?

Schools are funded from various sources, with school fees and government grants often covering staff costs and capital investments. The P&F supports the school by providing additional resources for better learning for all children. This requires additional financial support to purchase key resources for use in classrooms, upgrade and establish play areas and provide facilities such as Uniform and Tuckshops.

The P&F is responsible for managing and running the Tuckshop and the Uniform Shop. Combined these businesses have an annual turnover of approximately $130,000. These businesses have running costs including wages (Tuckshop) and regular invoices for food and uniforms. To ensure uniform costs are minimized, uniform items need to be ordered in bulk 3-4 times per year from a number of different suppliers. Individual invoices for uniforms can be more than $15,000, so the P&F must ensure it is in a strong financial position to meet these costs.

The P&F aims to maintain a minimum bank balance of $20,000 throughout the year.

What are the funds used for?

The P&F provides facilities and resources to support the school and students. Over the last seven years the P&F has supported the school by providing funding for:

- Artificial turf on the oval
- Landscaping and artificial turf outside the Parish Hall and Prep Classrooms
- Sandpit, artificial turf and shade sail for the Preps and Year 1’s
- Electronic whiteboards in classrooms
- New readers for all reading levels
- Fit out for the new uniform shop and tuckshop
- End of year Fun Day for all students.

Each year the P&F requires about $40,000 to support the school with these facilities and resources.

Will we still have events and the Fete?

Yes. The P&F will continue to run the Fete, the school discos, Welcome BBQ, Mother’s Day and Father’s Day stalls and the Father’s Day breakfast, with prices kept to a minimum and a focus on supporting our school community. Other events such as the Mother’s Day High Tea and the Trivia Night will also continue as social events for parents. With the introduction of a compulsory levy there would be less focus on fundraising with events.
How often will the Fete run?

The Fete will run every two years with the next fete in 2018. While the Fete will support the fundraising activities of the school, the main focus will be on a fun day for families and building a sense of community. While the Fete raises $35,000-$40,000 there is inherent weather risk with an outdoor event, so no specific profit can be guaranteed.

The Fete also requires a dedicated team to bring it together requiring many hundreds of hours of effort. In previous years, families have also been asked to donate items such as chocolates, soft drinks and ingredients. In 2016 the P&F stopped this and used the money raised through the levy to pay for these items.

Will the P&F still do other dedicated fundraising activities?

No, all other activities solely focused on fundraising will stop.

Fundraising activities such as Chocolate Drives, Lamington Drives, Silver September and Bunnings BBQs will no longer be required with the introduction of a compulsory P&F levy.

Do parents still need to volunteer?

Yes, we still need parents to volunteer for a smaller number of events. The P&F will still need parents to help out at events such as discos and the Welcome BBQ, and give up at least an hour of their time to help out at the Fete every second year. Where possible, this will be kept to a minimum.

It is impossible to run events without volunteers.
P&F Fundraising Contribution
Presented at P&F meeting on Tuesday 12 July 2016

2015 Parent Survey - Key Information

- Online survey
- Eight questions
- Conducted Sunday 21 June - Wednesday 1 July, 2015
- 127 Responses

Background

- Began a voluntary levy of $50 per term, per family in term 1, 2016
- Advice by BCE in June 2016, a voluntary levy cannot be managed with school fees each term due to accounting package constraints

Do you think $50 per term, per family is an appropriate amount for the P&F Fundraising Contribution?

- Yes: 74.2%
- Maybe: 15.7%
- No: 10.2%

If we do a Fete every second year, even considering the financial risk of the Fete then do you agree with holding the Fete every year?

- Yes: 45.6%
- Maybe: 24.8%
- No: 29.6%

If we do give families the opportunity to contribute to a P&F fundraising activity, do you think that some events would you like to see continue? (Choose as many as you like)

- Families 2015 want events for the children and events which build a sense of community.
Suggested Amount for St Joachim’s

- $25 per term, per family = $100 per annum per family
- Approximately $20,000 per annum for P&F to provide to the school

The Pros of a Compulsory Fundraising Levy

- A risk-free, reliable income for the P&F
- Less reliance on events and fundraising activities to raise money
- Fewer volunteers needed to deliver events
- Events can be focused on engaging with the community rather than on fundraising
- Same amount for all families
- Easy for the P&F to administer with the school fees
- Payment is easy for families – nothing extra to do
- Administration/accounting is easy for the school

NOTE: Ongoing communication about expenditure priorities for the school and is a must.

The Cons of a Compulsory Fundraising Levy

- Same amount for all families – may be a more significant impost for some families.
- Reduced sense of obligation to volunteer by some people.