



**Official Policy
of
Ogden Preparatory Academy**

8. Parents and Community

8.02.POL Donations and Fundraising Policy

Effective/Revision Date: 01/19/2017

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Ogden Preparatory Academy (the School) may engage directly in fundraising, in order to help advance the School's mission. The School encourages the contributions of gracious donors who have the resources, and the inclination, to make donations for the benefit of the School and its students. This policy establishes guidelines and standards for the School's acceptance of donations and gifts as well as for, fundraising activities.

Donations and Gifts

The School may not transfer or expend donated property in a manner contrary to donor restrictions imposed as a condition for making the donation. The Principal is also responsible for ensuring that donor restrictions of accepted donations are complied with and that compliance can be verified. The Principal will ensure that charitable donation receipts are provided to donors as necessary.

The Principal must approve voluntary donations from private individuals or organizations in excess of \$1,000 and any donation involving donor restrictions prior to accepting the donation. The Board of Directors must approve any voluntary donations from private individuals or organizations in excess of \$10,000. The School may not accept donations with the condition that the donation provides direct benefit to specific School employees, students, vendors or name brand goods or services.

If advertising or other services are offered to a donor in exchange for a donation or gift, the School will objectively value the donation or gift in order to ensure the School receives at least current fair market value.

The Principal must ensure that any applicable fiscal policies of the School are complied with in connection with donations. The School will comply with other applicable laws and regulations including, but not limited to, procurement requirements, rules related to construction of improvements, IRS regulations and Title IX requirements.

Fundraising

Fundraising is defined as an organized effort to solicit individuals, businesses or foundations for money or in-kind gifts to be given directly to the School.

For the purposes of this policy, “school sponsored” means activities that are expressly authorized by the School’s Principal or Board of Directors that support the School or authorized curricular clubs, activities, sports, classes, or programs that are themselves school sponsored.

School-sponsored activities must be managed or supervised by School employees. Activities sponsored by the School’s parent organization are not school-sponsored activities, but the parent organization may be involved in and provide assistance in connection with the school-sponsored activities.

The following guidelines must be followed in connection with School fundraising:

- The fundraising activity must be undertaken with the intent of obtaining a benefit consistent with the School’s mission;
- The fundraising activity must not violate the School’s charter, Board policies, or applicable law;
- Proposals for fundraising activities must be submitted to the School’s Principal for approval;
- The Principal may restrict the time, place and manner of any approved fundraising activity;
- Fundraising activities should be planned and scheduled in a manner that does not create conflict, confusion, or excessive fundraising pressures on students, families or potential donors;
- Fundraising activities that may expose the School to risk of financial loss or liability if the activity is not successful should not be approved;
- The participation of School employees, students and parents in any fundraising activity must be voluntary. However, school employees may be assigned to supervise students in connection with school-sponsored fundraising activities in connection with their employment. Such employees may be compensated for such work as appropriate as determined by the Principal;
- Students may not be required to participate in a fundraising activity as a condition for belonging to a team, club or group. A student’s fundraising efforts may not affect his or her participation time or standing in any team, club or group;

- Competitive enticements for student participation in fundraising efforts are generally discouraged, and the Principal must approve any such rewards or prizes;
- The Principal will ensure that the School’s Fee Waiver Policy is complied with in connection with all School-sponsored fundraising activities that involve fees. Any fee waivers must be granted in accordance with the Fee Waiver Policy;
- All funds raised through school-sponsored fundraising activities are considered public funds and will be handled accordingly. The Principal will ensure that all other applicable fiscal policies are complied with in connection with fundraising activities;
- Any fundraising activities that are related to the School, but not school sponsored, such as fundraising activities of the parent organization, should clearly inform School patrons that the activity is not school sponsored. School employees may participate in such activities as volunteers, but must not represent that they are acting as employees or representatives of the School;
- The Principal will ensure that charitable donation receipts are provided as necessary;
- The School’s employer identification number and sales tax exemption number may only be used by School personnel in connection with school-sponsored activities. No other entity, including the School’s parent organization, may use these numbers;
- Any School employee involved in managing or overseeing non-school-sponsored fundraising must disclose to the Principal any financial or controlling interest in or access to bank accounts of the fundraising organization or company;
- The School may cooperate with outside entities such as the parent organization in connection with non-school-sponsored fundraising activities. The School may allow these groups to use School facilities at little or no charge. At the Principal’s discretion, the School may provide some level of support or pay for portions of these activities. The details of the arrangements for non-school-sponsored fundraising activities shall be understood and agreed to by the Principal and the representatives of the outside entity. They must take into consideration the School’s fiduciary responsibility for the management and use of public funds and assets.

The School is committed to principles of gender equity and compliance with the Title IX guidance. The School commits to use all facilities, unrestricted gifts and other available funds in harmony with these principles. The School reserve the right to decline or restrict donations, gifts and fundraising proceeds, including those that might result in gender inequity or a violation of Title IX. Fundraising opportunities should be equitable for all students, comply with Title IX and be in harmony with Article X of the Utah Constitution.

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The Principal will ensure that School employees receive appropriate training in connection with these policies. Training shall be provided at least annually to employees whose job duties are affected by the School’s fiscal policies.

The Board will review this policy at least bi-annually.

Document History

Approved: 09/11/2003

Revised: 01/19/2017 Some language changed to reflect change in practice.

Legal References