

FUNDRAISING AND GIFT ACCEPTANCE

Background

Development of alternate sources of funding for the District's educational programs and facilities is a desirable goal of the Mt. Lebanon Board of School Directors. Opportunities are available to enhance or supplement traditional sources of School District revenue through the pursuit of advertising, sponsorships, donations, partnerships, fundraising, grants and other similar revenue enhancement activities.

The Mt. Lebanon School District (District) strongly encourages the solicitation and acceptance of gifts that enable it to fulfill its mission. It is the policy of the District to offer donors the opportunity to make gifts of cash and non-cash assets, in a manner beneficial to the donor, while protecting the fiscal and legal integrity of the District. It is also the policy of the District to give the opportunity to the donor to make gifts reserving life income for the donor and other beneficiaries through their estate plans or through current giving. The Mt. Lebanon Board of School Directors is committed to actively seeking such gifts.

Objective

The Mt. Lebanon School District recognizes its responsibility as a provider of public education to protect the welfare of students and maintain the integrity of the learning environment. The District's objective is to ensure that educational opportunities are enhanced and not compromised when donations are offered to the schools and the District.

The purpose of establishing the policies and procedures contained in this Fundraising and Gift Acceptance Policy is to:

- Protect the integrity of the District;
- Ensure that all donors are treated with consistency; and
- Protect donors and prospective donors.

All gifts to the District shall be governed by the policies and procedures contained in this policy and associated guidelines, with oversight by the Superintendent or designee. This policy cannot be modified without the approval of the Mt. Lebanon Board of School Directors.

The associated Fundraising and Gift Acceptance Guidelines are intended as an internal document primarily to guide the work of the District Advancement Office, the Finance Office, and fundraising volunteers.

Definitions

Donation: A gift or contribution of money, goods or services, given to a school or the District without expectation of something of value in return. While the school or District can provide appropriate donor recognition, any expectation of specific returns from the District or schools would make a contribution a sponsorship and not a donation. Tax receipts for charitable purposes are issued to donors for donations.

Recognition: Any form of acknowledgment or consideration provided by a school or the District for donations, sponsorships or partnerships.

Policy

Donations

Donations to the District and/or schools are encouraged by the Mt. Lebanon School Board. Individuals or organizations desiring to make donations to the District should consult with the Superintendent or his/her designee regarding the acceptability of anticipated donations.

Donations shall be used for activities designed to enhance student achievement and/or school-approved student activities; assist in the maintenance of existing District educational and athletic programs and facilities; assist in the development and funding of new educational and athletic programs and facilities; and/or provide financial assistance for students participating in athletic, academic and activity programs who demonstrate merit or financial need.

The District has the authority to accept all donations and reserves the right to decline any donation. Factors to be considered include, but are not limited to:

- The extent to which the donation limits or restrains the District's discretion or its ability to pursue other opportunities;
- The duration of the arrangement or agreement and the District's ability/discretion to terminate the arrangement/agreement;
- The extent to which the donation imposes any obligation on the District, either presently or in the future, financial or otherwise and whether the opportunity is subject to conditions acceptable to the District;
- The extent to which the donation constitutes a conflict of interest or creates the appearance of or potential for a conflict of interest;
- The extent to which the donation affects the appearance of District property or disrupts the operation of the District; and
- The extent to which the donation interjects advertising or commercialism into the schools or classrooms.

Any donation accepted by the District shall become the property of the District; may not be returned without the approval of the Board; and is subject to the same controls and regulations as are other properties of the District. The District shall be responsible for the maintenance of any donation it accepts, unless otherwise stipulated. The District will make every effort to honor the intent of the donor in its use of the donation, but reserves the right to utilize any donation it accepts in the best interests of the educational program of the District. The fact that funds, property or services have been provided as a donation to one school shall not require or preclude the providing by the District of like items for other schools.

In no case shall acceptance of a donation be considered to be an endorsement of a commercial product, business or institution of learning. Monetary donations designated for specific purposes as well as donations of equipment or materials are accepted by the District.

Donations must be positive, ethical and structured in accordance with the following principles:

1. Donations shall meet the needs and/or desires of the District and its students.
2. Donations must be consistent with codes of conduct and District policies, including those prohibiting discrimination on the basis of race, color, ethnicity, national origin, religion, gender, age or mental/physical disability, and must be age-appropriate for the students involved.
3. The Superintendent must retain discretion over how or whether to integrate commercially sponsored or provided material or programs given to the District as donations into the curriculum.
4. Any donation that includes a company logo to appear on District property, including logos on materials, supplies, or equipment donated to the District, shall be for product or sponsor identification purposes only.
5. No donation will be accepted that requires students to advertise a product, service, company or industry. This prohibition on student advertising includes athletic uniforms and equipment, although uniforms and equipment may display the name or logo of the uniform and equipment manufacturer or supplier.
6. The District has a duty to protect students' privacy and personal information. Students and schools shall not be required to complete questionnaires or surveys to provide marketing information to vendors, or distribute to vendors any personal student information, including but not limited to names, addresses and telephone numbers, except as may be required by law. No canvassing of students for commercial purposes is allowed on school property.

Gift Administration and Acceptance

Acceptance and Solicitation of Gifts

The Mt. Lebanon Board of School Directors authorizes the acceptance of gifts only where there is donative intent, where there has been full disclosure between the donor and the District, and where the gift is in the best interest of both parties. Any formal solicitation of gifts to the District will be made by authorized members of the District Advancement Office staff and fundraising volunteers only. All staff, representatives, or friends of the District are encouraged to refer any prospective donor to the District Advancement Office at the earliest possible time.

Gift Acceptance Committee

There shall be established a Gift Acceptance Committee, one of the functions of which shall be to review and either accept or refuse gifts pursuant to the applicable guidelines.

Gift Acceptance Committee members shall be appointed by the Superintendent and shall be chaired by the Director of Capital Campaign. Other members shall include, but not be limited to: the Superintendent, the Director of Communications, one of the Assistant Superintendents, and at least one other representative of the Central Administrative Team. Other members of the Gift Acceptance Committee shall be appointed by the Superintendent as appropriate to the intended use of the proposed gift.

Procedures upon Receipt of a Gift

Internal controls and procedures for accepting gifts are closely coordinated between the District Advancement Office and the Finance Department and are governed by the associated guidelines.

Reporting

Donors to endowed funds shall receive at least annually, a report on the investment return, distributions, and principal balance of the endowed fund.

Donor Bill of Rights

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy directed to the District merits the respect and trust of the general public, we adhere to the Donor Bill of Rights as developed by the American Association of Fundraising Counsel (AAFRC), Association for Healthcare Philanthropy (AHP), Council for Advancement and Support of Education (CASE), and the Association of Fundraising Professionals (AFP)¹:

- I.** To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
- II.** To be informed of the identity of those serving on the organization's governing board, and to expect the Board to exercise prudent judgment in its stewardship responsibilities.
- III.** To have access to the organization's most recent financial statements.
- IV.** To be assured their gifts will be used for the purposes for which they were given.
- V.** To receive appropriate acknowledgment and recognition.
- VI.** To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.
- VII.** To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
- VIII.** To be informed whether those seeking donations are volunteers, employees of the organization, or hired solicitors.
- IX.** To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
- X.** To feel free to ask questions when making a donation and to receive prompt, truthful, and forthright answers.

Recognition

It is appropriate that donors receive recognition for their support. Recognition for contributions to the District and/or the schools will adhere to the policies and procedures set forth in the Policy on Naming Rights.

Recognition can be in the form of a mention in the school newsletter, a news release, or letter to the involved party. In some cases and at the sole discretion of the Superintendent or his/her designee, recognition in the form of a temporary or semi-permanent display may be appropriate.

¹ As disseminated on the official website of the Association of Fundraising Professionals (<http://www.afpnet.org/ethics/enforcementdetail.cfm?itemnumber=3359>)

This could include a sign or banner at an event or the placement of a suitable plaque or nameplate in the case of significant contributions. The purpose of the display should be for donor identification only.

Administrative Responsibility

It shall be the responsibility of the Administration to implement and enforce this policy, and to develop and maintain Fundraising and Gift Acceptance Guidelines for implementation or enforcement where necessary to ensure that all donations are handled in accordance with State and Federal standards.

Communication

This Policy shall be communicated to:

1. District Staff
2. Students and Parents
3. Donors and Prospective Donors
4. The Mt. Lebanon Community

Adopted January 26, 1971
Revised September 26, 1977
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Revised August 15, 2005
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