

DONATIONS AND FUNDRAISING PROCEEDS GUIDELINES

FOUNDATION OPERATIONS MANUAL

DECEMBER 2019

UPPER DAUPHIN AREA TROJAN EDUCATIONAL FOUNDATION | 5668 STATE ROUTE 209, LYKENS, PA 17048

INTRODUCTION

The Upper Dauphin Area Trojan Educational Foundation was developed in 2015 for the purpose of developing, promoting and financing education programs, activities and projects for the Upper Dauphin Area School District, Lykens, PA for the advancement of academics, the arts and athletics. To fulfill that purpose, the Board of Directors has developed a set of guidelines that will be used to provide direction for managing general and earmarked donations made to the Trojan Educational Foundation as well as the proceeds of fundraising efforts.

SUPERSESSION

These guidelines supersede and replace all prior guidelines, rules and agreements related to donations and fundraising proceeds made to the Upper Dauphin Area Trojan Educational Foundation (“Foundation”). However, this document will not affect any funds already distributed or in the process of being distributed by the Foundation.

CORE FOCUS AREAS

The Foundation has set the following core focus areas to guide its efforts:

1. Enabling Academic Innovation and Improved Instruction – Programs and activities that enhance the ability for teachers and students to use state of the art, groundbreaking, creative or leading practice strategies and techniques to enhance learning and deliver curricula.
2. Enhancing the Student Experience – Programs and activities that improve the experience of students while they attend Upper Dauphin Area including initiatives that expand current offerings, meet needs of students that are not currently being met and/or enhance the number, type, operation or effectiveness of extracurricular programs across the district.
3. Modernizing Extracurricular Facilities – Programs and activities that allow for the physical improvement of facilities used for athletic, music, artistic and other extracurricular programs across the district.

These Core Focus Areas will be used to guide donations made to the Foundation.

GENERAL DONATIONS AND FUNDRAISING PROCEEDS

Definition

Any donation to the Foundation, or net fundraising proceeds of the Foundation, are considered ‘general’ unless they are otherwise earmarked by the Foundation Board of Directors prior to the donation or fundraising effort.

Timeline

General donations may be made to the Foundation at any point during the year.

Distribution Breakdown and Usage

General donations and net fundraising proceeds will be distributed as follows to the various activities of the Foundation:

- Grant Programs: 90%
- Alumni Recognition Programs: 6%
- General Administration and Fundraising Costs: 4%

Once distributed to these programs, the funds will be used based on separate guidelines approved by the Foundation Board of Directors to administer those specific programs. Transfers between program areas may be approved by two-thirds majority of the Foundation Board of Directors.

EARMARKED DONATIONS AND FUNDRAISING PROCEEDS

Definition

An earmarked donation is one made for a specific quantifiable purpose.

An earmarked fundraising activity is one that takes place to raise funds for a specific quantifiable purpose.

Approved Purposes

Any earmarked donation or fundraising activity must be for a specific quantifiable purpose that is approved by the Foundation Board of Directors prior to acceptance of the donation or commencement of activities related to the fundraising effort. The specific purpose must meet the Foundation purpose, and the core focus areas contained herein. The Foundation Board of Directors reserves the right to reject any donation, or withhold permission for any fundraising activity, that does not meet the Foundation's purpose or meet its current core focus areas. The Foundation Board of Directors also reserves the right to obtain approval from the Upper Dauphin Area School District Board of School Directors for certain activities prior to accepting a donation or allowing a fundraising activity. No donation or fundraising activity will be allowed that violates the law, UDASD Board Policies, UDASD Administrative Regulations, or is contrary to the mission and values of the Upper Dauphin Area School District.

It should be noted that scholarships that benefit individual students are not an approved purpose of the Foundation. Existing methods for managing and providing scholarships within the Upper Dauphin Area School District will be used for scholarship donations and sponsorships.

Timeline

Earmarked donations may be made to the Foundation at any point during the year.

Distribution Breakdown

Earmarked donations and fundraising proceeds will be distributed as follows to the various activities of the Foundation:

- Earmarked Purpose: 99%
- General Administration and Fundraising Costs: 1%

The earmarked distribution must be recorded within the accounts of the Foundation, and accounted for separately from general funds. Funds derived from earmarked donations or fundraising

proceeds may not be redistributed to other Foundation Activities unless approved by the original donor(s).

Usage of Earmarked Funds

If all of the funds needed for a specific earmarked purpose have been raised, the Foundation Board of Directors will authorize disbursement of funds. The disbursement will either be to the Upper Dauphin Area School District or directly to a vendor depending on the nature of the activity, program, or equipment/supplies. The Foundation reserves the right to determine the best timing for the distribution of funds based on consultation with the Administration Team and/or Board of School Directors of the Upper Dauphin Area School District. Once funding needs for a specific earmarked purpose have been met, no further funds will be accepted for that purpose. Any excess funds related to the earmarked purpose will be transferred to a maintenance account for the earmarked purpose.

If all of the funds needed for a specific earmarked purpose have not been raised, the Foundation will continue to accept funds for that purpose. The Foundation will monitor the earmarked account to determine when all funds have been raised.

Major Donor Committee

A committee consisting of three members of the Foundation Board of Directors will be formed to identify, solicit, and meet with individuals who wish to, or may wish to make large contributions to the Foundation. The committee will help the donors determine an approved purpose for their contribution, and help the donor through the donor process.