

Utah Military Academy Fundraising Policy

1. **Purpose**

1.1. Under the law, including fee waiver laws, fundraising is generally permitted by the Board of Trustees (Board) or the Utah Military Academy (UMA) administration to raise additional “local funds” to supplement authorized school activities.

2. **Definitions**

2.1. ***Cash or cash receipts*** means cash, checks, credit cards, electronic payments via a website or a mobile payment application, or other items used for payment.

2.2. ***Fundraiser, fundraising, or fundraising activity*** means

2.2.1. an activity or event provided, sponsored, or supported by a school to generate funds or raise money to:

2.2.1.1. Provide financial support to a school or any of the school's classes, groups, teams, or programs

2.2.1.2. Benefit a particular charity or for other charitable purposes.

2.2.2. and may include:

2.2.2.1. The sale of goods or services;

2.2.2.2. The solicitation of monetary contributions from individuals or businesses

2.2.2.3. Other lawful means or methods to generate funds

2.3. ***Group fundraiser or group fundraising*** means a fundraising activity where the money raised is used for the benefit of a group, team, or organization.

2.4. ***Individual fundraiser or individual fundraising*** means a fundraising activity where money is raised by an individual student to pay the individual student's fees.

2.5. ***Local funds*** are defined as funds received by UMA that are not state or federal program funds or funds from state or federal sources, as established in law.

2.6. ***School-sponsored*** means an activity, fundraising event, club, camp, clinic, or other event or activity that is authorized by the Superintendent/Principal that satisfies one or more of the following conditions:

2.6.1. Is managed or supervised by a UMA employee, by the authorized UMA parent organization, or by a UMA-approved volunteer working on behalf of UMA

2.6.2. Uses UMA facilities, equipment, or other UMA resources

2.6.3. Is supported or subsidized, more than inconsequently, by public funds, including the public school's activity funds or Minimum School Program (federal dollars)

2.6.4. Is not managed, supervised, or provided by another authorized and properly insured entity

3. **Policy**

3.1. **Board Oversight**

3.1.1. Fundraising at the Board level is authorized only after consultation with the Superintendent and an affirmative Board vote.

3.1.2. The Board shall at least annually review UMA's local fundraising activities and all local activities that support or subsidize UMA.

3.1.3. The Board shall ensure that revenues raised during fundraising activities or through activities that support UMA are raised in accordance with all established regulations and policies and that they support the UMA mission and vision.

3.1.4. The Board is committed to principles of gender equity and will use its facilities, unrestricted gifts, and other UMA funds in harmony with those principles (Title IX). The Board recognizes that fundraising is driven by a donor's inclination for giving and that private donations may be directed or restricted by individual donors. The Board is ultimately responsible for the expenditure and allocation of all funds, including those obtained through fundraising and gifts.

3.1.5. The Board shall ensure that UMA complies with R277-408 and R277-113.

3.1.6. The Board shall ensure that UMA shall not circumvent established UMA fee regulations by calling what is ordinarily a "fee" a "donation" to avoid fee waiver regulation.

3.2. **Superintendent Oversight**

3.2.1. The Superintendent shall:

3.2.1.1. Develop procedures for all fundraising activities.

3.2.1.2. Confirm that all fundraising activities, including those by the authorized UMA parent organization, are adequately reviewed and considered with the UMA insurer to evaluate and manage risks associated with such activities.

3.2.1.3. Ensure all of the following for any employee, the authorized UMA parent organization, an approved UMA volunteer working on behalf of UMA, or any person representing UMA involved in fundraising organizations working on behalf of or for the benefit of UMA, who is either involved in fundraising activities or will temporarily hold funds that will benefit UMA:

3.2.1.3.1. A Conflict of Interest document is completed and on file with UMA, at a minimum annually.

3.2.1.3.2. All required fundraising training is completed prior to fundraising activities.

3.2.1.3.3. Review of and compliance with the standards set forth in all UMA policies, procedures, and that all fundraising activities comply with R277-408,

R277-113, and Title IX requirements found in 20 U.S.C. 1681, et seq.

3.2.1.4. Authorize, administer, and supervise the fundraising activities of:

3.2.1.4.1. UMA

3.2.1.4.2. The authorized UMA Parent Teacher Organization

3.2.1.4.3. An approved UMA volunteer working on behalf of UMA

3.3. ***Authorized school-sponsored activities***

3.3.1. Authorized school-sponsored activities may:

3.3.1.1. Use the UMA name, facilities, and equipment

3.3.1.2. Utilize UMA employees and other resources to supervise, promote, and otherwise staff the activity or fundraiser

3.3.1.3. Be eligible to be insured under the UMA liability insurance policy (subject to the policies of the school's insurer)

3.3.1.4. Provide additional compensation or stipends for UMA employees with the approval of the Superintendent, under UMA payroll policies, and in a manner consistent with the UMA budget.

3.3.2. Fundraising activities, or activities of outside organizations of any kind that are not school-sponsored activities, must be conducted independently and without commingling of funds, decision-making authority, or financial accounts with UMA.

3.4. **Grants**

3.4.1. Any grants that are not part of UMA's regular state or federal operating funding are considered fundraising and must be approved by the Superintendent and the Business Administrator. If the grant includes obligations, restrictions, or compliance requirements, it must also be approved by the Board. It is the responsibility of the Superintendent to ensure proper compliance with all grant requirements applicable to grantees, including state or federal regulations and guidance where applicable.

3.5. **Funds**

3.5.1. Funds requested voluntarily from UMA patrons for fundraising activities must always be voluntary contributions.

3.5.2. All local funds are public funds once UMA receives the award, including before the award is deposited in the UMA financial institution.

3.5.3. All expenditures of UMA, including expenditures with local funds raised during fundraising activities, shall be made in accordance with the law and established UMA policies and procedures.

3.5.4. All items purchased with funds gained through fundraising activities are the property of UMA, with the exception of supplies, clothing, or other materials provided through UMA programs for student consumption or ownership (curricular/extracurricular activity uniforms, completed project work, etc.)

3.6. **Individual and Group Fundraising Requirements**

3.6.1. Individual schools or groups may not authorize, establish or allow for required individual fundraising.

3.6.2. Individual schools or groups may provide optional individual fundraising opportunities for students to raise money to offset the cost of student's fees

3.6.3. UMA may allow for required group fundraisers, which need to provide the following:

3.6.3.1. The school shall notify parents of any required group fundraising.

3.6.3.2. The notification shall inform parents and students of how and when the fundraiser will occur, including specific details.

3.6.3.3. The details shall include:

3.6.3.3.1. A description of the nature of the required group fundraiser.

3.6.3.3.2. The estimated participation time required of the student and/or parent for the required group fundraiser.

3.6.4. UMA may not deny a student membership on a team or group nor impact a student's grade for a course, based on the student's effort or non-participation in a fundraiser. However, UMA may reduce a student's participation in a program or activity if the student does not participate in the related activity or program's required group fundraiser (see R277-408(4)(3)).

3.6.5. UMA shall require compliance with R277-113, R277-408, and Title IX when using alternative revenue-raising methods for all activities.

3.6.6. All funds received must be deposited within 3 days of receipt and in accordance with UMA policy.

3.7. **Fundraising Activity Approval Process**

3.7.1. All fundraising activities conducted on behalf of, or for the benefit of, UMA must be approved in advance by the School Principal in accordance with UMA's fundraising approval process.

3.7.2. Any employee, the authorized UMA parent organization, an approved UMA volunteer working on behalf of UMA, or any person representing UMA in fundraising activities must follow the fundraising approval process as outlined by the UMA Business Office.

Board Reviewed and Approved: