

LINCOLN-SADBURY REGIONAL SCHOOL DISTRICT

POLICY ON DONATIONS AND FUNDRAISING

A. Introduction

The Lincoln-Sudbury Regional School Committee (the “School Committee”) recognizes and appreciates the benefits to the school of donations of time, talent, and money in support of the educational goals of the Lincoln-Sudbury Regional School District (the “District”). In particular, school support organizations, such as the Lincoln-Sudbury Parent Organization (LSPO), the Sudbury Education Resource Fund (SERF), the Foundation for Educators at Lincoln-Sudbury (FELS), and the Lincoln-Sudbury All Sports Boosters (Boosters) have provided valuable support to the Lincoln-Sudbury Regional High School. At the same time, the Committee believes that public education is a common good that should be adequately supported by federal, state, and local governments. School-age children in Lincoln and Sudbury are entitled to a free and appropriate education under applicable law. In general, private donations should not be used to pay for core curriculum or other programs that fall within the obligations of the District.

The School Committee may accept donations to assist the District in furtherance of its educational goals and in accordance with applicable laws. Donations subject to this policy include all monetary gifts, donations, grants, or bequests, and all donations of equipment, materials, or other donations in kind. This policy does not apply to privately funded projects, which must be separately accepted by the School Committee.

B. Ownership of Donations

Any donations to the District, whether in cash or in kind, that are accepted in accordance with this Policy, shall thereby automatically become the property of the District.

All proposals to the School Committee for donations will require relevant departmental and administrative approval prior to being presented. Donations may not be spent or used in the school unless and until they have been accepted on behalf of the District by a vote of the School Committee, subject to the exceptions stated below. All donations accepted by the School Committee will be expended at the discretion of the School Committee. Donations that are accepted by the School Committee will ordinarily be accepted without condition or restriction, unless the School Committee approves a proposed condition or restriction as being in the interest of the District. All donations accepted by the School Committee will become the property of the District to be used as the Lincoln-Sudbury School Committee deems appropriate and are subject to the same controls and laws that govern the use and disposal of other school-owned property. Monetary donations will be placed in a separate account as needed and in compliance with applicable laws. Donations of capital in excess of the greater of \$25,000 or the applicable statutory threshold at the time of the proposal, will require an analysis as to whether compliance with applicable public bidding and/or purchasing laws is required. The District will comply with all such laws where applicable, including the conduct of any required processes to request proposals in advance of final approval.

Approved Booster and support organizations, such as the Boosters, SERF, FELS, the LSPO, and recognized 501(c)3 registered charitable “Friends of” organizations may make donations of capital equipment to the District. However, all organizations agree that capital equipment valued over \$5,000 will only be purchased with the prior notification and approval of the Superintendent/Principal, with the recommendation and approval of, as appropriate, the Athletics Director, Director of Buildings and Grounds or Director of Finance and Operations, and/or other relevant faculty and staff, with notification to the Committee of any such action. The preferred method for the acquisition of such capital equipment is for organizations to donate the funds to the district for purchase of such items. The District will then follow the appropriate purchasing laws, regulations and procedures in procuring the equipment. If approved and if equipment is acquired by the organization and donated directly, such equipment shall become the property of the District. The District will not accept any donations merely to avoid applicable public bidding, purchasing and/or construction requirements laws.

C. Exceptions to Requirement of School Committee Approval

Donations may not be spent or used in the District unless they have been accepted by a vote of the School Committee, except in the following circumstances when District personnel are authorized to accept donations on behalf of the School Committee:

1. The Superintendent/Principal is authorized to accept grants on behalf of the Committee from the federal, state, county, or local governmental agencies, private foundations, corporations, or private organizations when the District or a staff member has applied for the grant with the approval of the Superintendent/Principal, with the following conditions:
 - Grants from organizations, including the LSPO, SERF, FELS and Boosters, in the amount of \$7,500 or less per proposal;
 - Multiple smaller donations from a single organization that do not exceed \$1,500 in total in a single fiscal year; or
 - Donations of \$1,500 or less from school support organizations with their own 501(c)(3) non-profit tax status, or entities with a non-profit application initiated who have the approval of the Superintendent/Principal.
2. Duly authorized school administrators are authorized to accept on behalf of the school gifts from individuals or organizations in the form of supplies, materials, and equipment for the school (or money for the purchase of such supplies, materials and equipment), not to exceed a value of \$500 per donor in a single school year. However, such school administrators may not accept a donation of any amount that would be spent to alter the physical plant or other school property without the approval of the School Committee. Each administrator shall provide the Superintendent/Principal with a full reporting of all such donations.
3. In-kind contributions may be accepted by the District only upon the advance approval of the School Committee. In determining whether to grant such approval, the School Committee will consider such factors as it deems relevant, including any safety considerations and any costs of installing or maintaining the property and its usefulness to the educational program. The School Committee may condition its acceptance of a contribution in kind on the agreement of the donor to bear the costs of installing or maintaining the property to be offered in kind, or may condition its acceptance upon any other condition that the School Committee determines to impose.
4. Donations of time and personal services by parents and other Lincoln, Sudbury, or Boston residents shall not be subject to this policy. This exemption shall apply to individual volunteerism only and shall not extend to donations of services by employees and agents of businesses or commercial entities, which shall be treated the same as donations of money or other contributions of economic value under this policy.

Donations of cash may be accepted for the purpose(s) specified by the donor, upon approval by the School Committee. Donations in-kind that are subject to conditions or restrictions imposed by the donor will not be accepted by the School Committee or the Superintendent/Principal or any other District official, as the case may be. However, the School Committee will consider donor requests for the use and assignment of donated property before accepting contributions in kind.

The Superintendent/Principal will report to the School Committee annually with a comprehensive report of all donations and grants that exceed \$500 in value, other than donations of time and personal services, accepted by District personnel on behalf of the School Committee.

D. Fundraising and Solicitation

It is the preferred policy of the District that all operating costs associated with activities, academic programs and athletic programs be funded within the regular operating budget. It is understood, however, that circumstances may arise where it is not possible for all expenses to be supported and covered by the budget. If the

Superintendent/Principal and the School Committee wish to approve alternative sources of funding, the following guidelines are applicable:

- All proceeds from fundraising efforts for District activities become the property of the District and are subject to appropriate accounting policy and procedures of the District.
- All fundraising activities should have a specific purpose; all proceeds should be used solely for educationally sound programs at LSRHS.
- Any fundraising activity should be first-and-foremost an opportunity for team-building and achievement of a common goal. Discrimination based upon level of success or contribution to any LSRHS organization from fundraising is strictly prohibited.
- Fundraising is by nature a public activity. The School Committee recognizes that fundraising should have an articulated goal and/or basis. While it is understood that solicitation may be part-and-parcel of some fundraising efforts, door-to-door solicitation is strongly discouraged.
- Should a student or student's family have concerns with regard to any fundraising efforts, it remains the responsibility of the advising LSRHS staff/faculty member to meet with the concerned party(ies) and suggest acceptable alternative opportunities to support the fundraising effort.
- Fundraising activities may be held to defray the costs of field trips and must be supervised by the class or activity sponsor. Fundraising efforts for overnight field trips must be approved by the School Committee in line with this policy, the student travel guidelines and the District's Field Trip policy.
- Coaches' stipends, advisors' stipends, transportation to and from games and practices, officials' fees, dues, and uniforms are to be funded by the District's operating budget and not through private fundraising. Individual team fundraisers may generate revenues to be used by that specific team to supplement the above-listed expenses of the athletic program or activity, except for coaches' and advisors' stipends, subject to such limits as the Superintendent/Principal may establish. Examples of uses for funds include transportation upgrades and non-essential equipment.
- Funds raised from Booster activities may be used for such supplementary activities as: awards and trophies, operation of the concession stand, and other equipment.
- Gate receipts collected by attendance at any athletic program are used to offset the Athletic Department costs in general.

With regard to solicitation, the School Committee will place limits on outside commercial activities and fundraising activities, and reasonable limits on District fundraising activities at Lincoln-Sudbury Regional High School District for the following reasons:

1. The District should provide students, parents, and staff some measure of protection from exploitation by commercial, charitable, and District fund-raising organizations;
2. Some commercial and fund-raising activities may disrupt school routine and cause loss of instructional time.

Superintendent/Principal and Housemasters may permit occasional commercial or fundraising activities related to the objectives of the school. However, any group or organization that seeks to raise funds in excess of the thresholds set out in Section C1 of this policy, to support the District, especially to support a particular program or initiative, must communicate with the District and receive the Superintendent/Principal's permission to ensure its efforts are compatible with the District's educational goals. Generally, communication and coordination with the District would be desirable for any fundraising efforts. Donations from fundraising efforts are subject to the donation approval policy. The School Committee may choose to not to accept donations from fundraising efforts in the absence of approval prior to the fundraising effort.

Generally,

1. No direct solicitation of students or staff may take place without the Superintendent/Principal's permission.
2. No general or class distribution of commercial or fundraising literature may take place without the Superintendent/Principal's permission.

3. For purposes of this policy, the LSPO and other specified groups will be considered “school groups” and will be governed by the Committee’s policy on staff solicitations.

E. Conditions for Acceptance of Donations or Fundraising Proceeds

The School Committee reserves the right to reject any donation or proceeds from fundraising if it finds that the donation would not serve the interests of the District. The School Committee will normally accept only those gifts that benefit the District as a whole or all the same classes in a subject or grade level within the school (e.g., those that strengthen the scope and sequence of the curriculum or the many co-curricular and support programs), subject to the limited exceptions listed below. The School Committee will consider the overall interests of the District in reviewing each circumstance, but generally will not accept donations or proceeds from fundraising under the following circumstances:

1. The targeted purpose is incompatible with existing or planned curriculum, programs, or educational goals of the District.
2. The donation or fundraised proceeds would result in an unreasonable inequity among classes or groups of students within the District that are protected by applicable anti-discrimination laws (e.g., gender, race, religion, sexual orientation or disability).
3. The donation or purpose for fundraising would constitute an operating expense and result in a recurring cost to the District such as the salary or benefits for a staff position, or ongoing maintenance or support of equipment or materials, or would create a cost to the District to terminate or eliminate the staff, equipment or materials (e.g., unemployment). Funding for ongoing maintenance must accompany any donation of capital or capital purchased through fundraising, equal to 10% of the overall value of the donation or such higher amount as the Committee may require.
4. The donation or purpose for fundraising may require special supplies, maintenance, or installation, or entail other significant costs not covered by the donation or funds raised.
5. The donation or purpose for fundraising would involve unreasonable advertising or promotion of a commercial interest.
6. The donation or purpose for fundraising would support a program that has been discontinued or any program, equipment or materials, or a capital item that was proposed but not funded through the District’s budget.

F. Advertising in the School

Advertising of commercial products or services will only be permitted in school buildings or on school grounds or properties with the permission of the Superintendent/Principal. Publications of the District will not contain any advertising, including on-line advertising. However, this policy will not prohibit advertising in student publications that are published by student organizations, subject to administration controls, or the use of commercially-sponsored, free teaching aids if the content thereof is approved by the Superintendent/Principal.

Proposals involving recognition signage in support of programs or facilities on campus by commercial or private interests must be brought to the School Committee for consideration and discussion on a case-by-case basis.

Solicitation of sales or use of the name of the District to promote any product will not be permitted by the School Committee.

G. Expenditure of Gifts over more than one Year

In the case of any grant or gift of cash given for educational purposes or for other purposes that remains unspent at the end of the year in which the gift was made, the District may expend such funds for the purposes of each

grant or gift with the approval of the School Committee in the following budget year. Any grant or gift of cash will be accounted for in accordance with applicable laws.

The Committee recognizes that any policy statement on this topic will not be comprehensive in its resolution of all questions and situations. The Committee expects, from time to time, to render specific decisions, including policy exceptions, when it deems circumstances so warrant. Moreover, the Committee may amend this Policy from time to time at its sole discretion.

Reference: Mass. Gen. Laws ch.71, §37A; Mass. Gen. Laws ch.44, §53A, as amended

Adopted 10/08/02

Amended and Adopted 11/09/05

Amended and Adopted 09/09/08

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