

DONATIONS AND GIFTS POLICY

Purpose: The purpose of this policy is to comply with donations and gifts requirements under 501(c)(3) laws.

Policy: Weber State University Charter Academy will use the following guidelines and Weber State University policies (PPM) for fundraising:

Financial contributions or other forms of donation are always welcome so that the school may continually grow and strengthen for the students of the future.

As permissible by law, WSU Charter Academy may make donation requests to supplement the school's limited funds. These requests will follow Weber State University PPM 1.2 and 2.2. All donation requests are strictly voluntary, and must be worded as such. Students may not be excluded from activities or penalized in any way because they did not make donations. At no time will the names of those who did not make donations be revealed, although those who make major donations may be honored. All donations are tax-deductible.

The philosophy of Weber State University Charter Academy (WSU Charter Academy) stresses, in part, the encouragement by the administration of the continuing improvement of new curriculum and instructional programs and practices.

In keeping with this philosophy, the Board of Directors is receptive to outside financial support to aide in coordination, implementation, and maintenance of existing and new programs as may be initiated consistent with the statements below. The Board of Directors reserves the right to turn down any outside funding that is inconsistent with the above-stated philosophy or other Board of Directors policies.

Basic Principles

The administration will actively seek both public and private supplemental income sources. All funds received will be under the control and supervision of WSU Charter Academy. Outside funds will not dictate the direction of new or existing programs nor in any way hamper their objective evaluation. All proposed gifts will be properly investigated by WSU Accounting Services to ensure that such encumbrances do not exist.

Outside funds will not be used to substitute for regular funding requirements, but rather to enrich and supplement the regular sources. Projects to be funded in this manner should be only those in WSU Charter Academy's short-range and long-range interest.

Specific items may be contributed to WSU Charter Academy subject to the review or inspection by the Dean of the Moyes College of Education regarding their propriety and applicability. The Dean of the Moyes College of Education is authorized to accept gifts on behalf of the Board of Directors. Donors will be officially thanked in writing in the Board of Director's name. All major gifts will be reported to the Board of Directors.

To the extent that the receipt, implementation, or use of any funds or item donated requires the expenditure of any school funds or services, the acceptance of the gift will be without any promise,

express or implied, by the Board of Directors, other than to use the gift to meet proper educational objectives. When a donor expresses the wish that a gift carry with it some legal and reasonable limitation upon its use, the Board of Directors will honor that wish, if and only for so long as the Board of Directors determines, at its sole discretion, that the inclusion or continuation of such limitations is appropriate.

Periodic reports of activities resulting from gifts, grants, or bequests will be given to the Board of Directors by the Business Manager. All funds received will be audited in accordance with appropriate state statutes and school auditing policies.

Instructional Materials

The Board of Directors welcomes gifts of library books and other instructional material provided they meet the same standards of selection as those applied to school-purchased materials. The school also retains the right to dispose of these materials if they become outdated or if cost of their maintenance or repair is prohibitively expensive.

Solicitation of Gifts from Private Sources

No. 2-1	Rev.	Date 4-20-77
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POLICY

The Office of University Development is responsible for coordinating the fundraising activities of the University and for the receiving and acknowledging of all private gifts in cash, real property and securities or kind received by the University from the public sector.

All fundraising contacts, projects or activities directed to the private sector, i.e., individuals, foundations, businesses, corporations, service clubs, organizations, etc., must be coordinated through and approved in advance by the Office of University Development.

Authorization to Accept Gifts

No. 2-2	Rev. 12-13-11	Date 4-20-77
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I. REFERENCES

PPM 1-2, Board of Trustees, Role of

II. POLICY

A. The president has the authority to accept gifts of any nature which, in his/her judgment, will be beneficial to the University. Such gifts are subject to ratification by the Board of Trustees.

B. The University will not establish a value for gifts-in-kind.

III. PROCEDURE

A. All gifts are to be receipted through the Office of Advancement Services. Gift reports are distributed to the President and Board of Trustees.

B. All individuals receiving gifts in the name of Weber State University should deliver the donation or evidence of the donation to the Office of Advancement Services and notify the Development Office immediately so the donation will be deposited and the appropriate recognition of the donor and expression of appreciation of the University for the gift will be initiated.

C. Upon receipt of a gift of cash, securities or kind, the Office of Advancement Services will generate a receipt that is sent to the donor. The gift, or its proceeds, are deposited with Accounting Services through the Cashier's Office following their established procedures.

D. Most gifts made directly to the University through the Office of Advancement Services are subject to review as to the desirability, value and function of the gift. If there is a question concerning the utilization or practicality of any gifts, it is referred to President's Council and the Board of Trustees. There are occasions when donors may leave or deliver to the University certain gifts, particularly in kind, without receiving prior approval in which case the University will act in the best interest of the donor as is practical. The vice president for University Advancement coordinates and follows through on all such matters brought to his/her attention. E. The University Development Office is the official department authorized by the Board of Trustees to solicit private gifts, bequests, properties, etc., for the University. These gifts are administered by the assigned responsible campus entity pursuant to terms of Gift Agreements established by the donor, the appropriate campus unit(s), and the Development Office. It is the policy of the Development Office that gifts of kind or any other unusual or special nature are subject to the review of the vice president for University Advancement, President's Council, and Board of Trustees. If necessary, final decision on questionable gifts are referred to President's Council or the Board of Trustees.

F. Donors of gifts of an unusual or substantial amount receive a letter either from the vice president for University Advancement or the president of the University. The president of the University receives an Advice of Gift notification on all gifts received by the University which carries a notation as to which gifts should receive presidential acknowledgement. G. All donations to the University receive a personally signed correspondence from the vice president for University Advancement in addition to an acknowledgement and gift receipt, unless the donor requests no recognition or acknowledgement.

H. The Office of Advancement Services reviews all gifts to assure proper acknowledgement has been sent. Accounting Services reviews deposits of gifts to make sure they are deposited to appropriate accounts.

I. A variety of special awards or acknowledgements are provided by the Development Office including citations, resolutions, plaques, recognition dinners, apparel, personal tokens, parking privileges, and presentations appropriate to the amount and nature of the gift.