Financial Training for Coaches and Advisors
INTRODUCTION
Purpose

USOE Rule 277-113 requires everyone associated with finances receive annual training.

This training is appropriate for any coach, assistant coach, advisor, teacher or employee of Jordan School District; it is specifically designed for high school head coaches and advisors. Each coach/advisor should review this training annually. This training will be updated to reflect changes in State law, District policy, guidelines, recommendations and practices.

The purpose of this training is to provide an overview of the financial policies that are most relevant to coaches and advisors. It is not comprehensive and does not address every financial issue that might be encountered by a coach or advisor. It should be viewed as a resource and guide to District Financial Policies.

Failure to comply with information presented in this training could result in disciplinary action, revocation of teaching license, prosecution or litigation.
Why does the District have Financial Policies?

Financial policies are in place to protect the assets, students, resources and employees of Jordan School District. Although complying with policies often requires more time and effort, they are not meant to make your job more difficult or cause undo burden.

Policies are designed to minimize theft, fraud or other financial loss. More importantly, policies are designed to prevent you from false accusations.

Financial policies have been established at a District level in order to establish uniform practices at all schools. Additional, more restrictive, policies may be implemented at a school level at the discretion of the principal. As such, it is important to rely on District and school training and reference materials rather than to solely rely on the advice, practice and recommendation of others, within or outside Jordan School District.
Public Funds
All money, funds, and accounts, regardless of the source from which the money, funds, and accounts are derived, that are owned, held, or administered by Jordan School District or any of its schools are considered “public funds” per state statute 51-7-3(26).

All District employees are accountable for the requirements in the Financial Accounting Manual. While not all sections apply to all positions, it should be seen as a resource to all employees with any financial responsibility. Much of the accounting manual is a result of what was learned from prior events.

The accounting manual is updated regularly based on changes in State Laws and requirements, user suggestions, and other factors. The current accounting manual can be found on the District’s Accounting website or:

BUDGET RESPONSIBILITIES
Budget Responsibilities

As the coach or advisor, you are responsible for the team or activity budget. Some clubs have very small budgets while some sports teams have extremely large budgets. In both scenarios, it is essential that you are aware of all transactions (both in and out) occurring in your account.

The head financial secretary can print for you a detailed listing of your account including beginning balance, deposits, student fees collected, checks issued, any transfers and current balance. It is reasonable to request this report at the beginning of a new season/year, after a big event, at the end of the year, or every few weeks.

If you find errors, work with the financial secretary who can correct them. Errors should be researched and corrected as soon as they are discovered. Do not wait until the end of the season or year to resolve an issue.
Budget Responsibilities (Cont.)

Activities/teams may have as many as 3 accounts associated with the activity

1) **School Account** (programs 2xxx) funds are given to the activity by the school from gate receipts, activity fees or other school funds
   - Principal may allocate funds as necessary

2) **Club Account** (programs 3400-3579) – funds are generated from student fees and fundraisers
   - Excess fees belong to the club and must stay with the club, may NOT be reallocated by the principal

3) **Booster Account** (programs 3625-3660) – in most cases booster club activity is combined with the school club account. If the boosters are working on specific fundraising efforts that need to be separated from student fees and activities, the boosters are provided a separate account here.
   - Money belongs to the booster club and should be spent in cooperation with booster club representatives. However, like other public funds, purchases much follow established District procedures.

In ALL cases, no separate bank accounts are permitted. **NO EXCEPTIONS.** Money must be deposited into the school’s bank account. Receipts or invoices must be turned in for reimbursement or payment.
### Example Report 1 – Account Activity

**Beginning Balance**
- Balances and transactions ending with CR are positive/funds available
- Balances and transaction not ending in CR are negative/overspent

**Ending Balance**
Includes all checks issued. Does NOT include outstanding orders or POs.

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>CR/DR/Ref</th>
<th>Vendor/Payer</th>
<th>Description</th>
<th>Amount</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/21/2014</td>
<td>Check</td>
<td>23289</td>
<td>DOMINO'S PIZZA</td>
<td>Pizza for Crochet Club Meeting</td>
<td>25.00</td>
<td>415.63CR</td>
</tr>
<tr>
<td>01/21/2014</td>
<td>Check</td>
<td>23740</td>
<td>HOBBY LOBBY</td>
<td>Yarn, Needles, Ribbon</td>
<td>15.63</td>
<td></td>
</tr>
<tr>
<td>01/21/2014</td>
<td>Fee</td>
<td>215080</td>
<td>SMITH AMY</td>
<td>CROCHET CLUB</td>
<td>20.00CR</td>
<td></td>
</tr>
<tr>
<td>01/21/2014</td>
<td>Fee</td>
<td>275081</td>
<td>ANDERSON ADAM</td>
<td>CROCHET CLUB</td>
<td>20.00CR</td>
<td></td>
</tr>
<tr>
<td>01/21/2014</td>
<td>Fee</td>
<td>215082</td>
<td>JONES JOSHUA D</td>
<td>CROCHET CLUB</td>
<td>20.00CR</td>
<td></td>
</tr>
<tr>
<td>01/21/2014</td>
<td>Fee</td>
<td>215082</td>
<td>JONES JOSHUA D</td>
<td>CROCHET CLUB</td>
<td>10.00CR</td>
<td></td>
</tr>
<tr>
<td>01/21/2014</td>
<td>Fee</td>
<td>215084</td>
<td>JOHNSON ASHLEY MARIK</td>
<td>CROCHET CLUB</td>
<td>50.00CR</td>
<td></td>
</tr>
<tr>
<td>01/21/2014</td>
<td>Fee</td>
<td>215084</td>
<td>LARSON NICOLE JUNE</td>
<td>CROCHET CLUB</td>
<td>20.00CR</td>
<td></td>
</tr>
<tr>
<td>01/21/2014</td>
<td>Fee</td>
<td>215084</td>
<td>LARSON NICOLE JUNE</td>
<td>CROCHET CLUB</td>
<td>10.00CR</td>
<td></td>
</tr>
<tr>
<td>01/21/2014</td>
<td>Fee</td>
<td>215084</td>
<td>LARSON NICOLE JUNE</td>
<td>CROCHET CLUB</td>
<td>45.00CR</td>
<td></td>
</tr>
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*End of report*
## Example Report 2 – Fee Code Total Report

<table>
<thead>
<tr>
<th>CUSTOM_KEY</th>
<th>CUSTOMER_NAME</th>
<th>AMOUNT</th>
<th>PAID/CREDIT</th>
<th>DUE</th>
<th>CHECK</th>
<th>RECE</th>
<th>STU_COUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>CROCHET</td>
<td>CROCHET CLUB (Ent: 704)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANDERADA004</td>
<td>ANDERSON, ADAM</td>
<td>20.00</td>
<td>20.00</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JOHNST002</td>
<td>JOHNSON, ASHLEY</td>
<td>50.00</td>
<td>50.00</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JONESJO002</td>
<td>JONES, JOSHUA</td>
<td>20.00</td>
<td>20.00</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>JONESJO002</td>
<td>JONES, JOSHUA</td>
<td>20.00</td>
<td>20.00</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LARSONIC02</td>
<td>LARSON, NICOLE</td>
<td>20.00</td>
<td>20.00</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LARSONIC02</td>
<td>LARSON, NICOLE</td>
<td>10.00</td>
<td>10.00</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LARSONIC02</td>
<td>LARSON, NICOLE</td>
<td>10.00</td>
<td>10.00</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MILLER003</td>
<td>MILLER, TAYLOR</td>
<td>20.00</td>
<td>0.00</td>
<td>20.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MILLER003</td>
<td>MILLER, TAYLOR</td>
<td>10.00</td>
<td>0.00</td>
<td>10.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OLSENJS001</td>
<td>OLSEN, JESSICA</td>
<td>20.00</td>
<td>5.00</td>
<td>15.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OLSENJS001</td>
<td>OLSEN, JESSICA</td>
<td>10.00</td>
<td>0.00</td>
<td>10.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SMITHAMY00</td>
<td>SMITH, AMY</td>
<td>20.00</td>
<td>20.00</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL FOR BILL TYPE General**

<table>
<thead>
<tr>
<th>AMOUNT</th>
<th>PAID/CREDIT</th>
<th>DUE</th>
<th>STU_COUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>255.00</td>
<td>200.00</td>
<td>55.00</td>
<td>7</td>
</tr>
</tbody>
</table>

***GRAND TOTALS***

<table>
<thead>
<tr>
<th>AMOUNT</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>255.00</td>
<td>200.00</td>
<td>55.00</td>
<td>7</td>
</tr>
</tbody>
</table>

- **Amount charged to student**
- **Amount paid**
- **Amount due**
- **Number of students** – should match total number of participants
- **Bill code and description**
- **Students** – will list a single student multiple times if there are multiple charges
Specific things to look for when reviewing your reports

- Expenses belonging to a different activity or team but were charged to your account.
- Expenses that you know have been paid, but aren’t showing up on your account.
- Students who are not part of your team/activity paying fees into your account.
- Student fees that are not included that you know have been paid because the student showed you a receipt.
- When reviewing your current balance, keep in mind there may be additional purchases or costs that have not been paid. Your budget will not be charged for something until a check has been written to the vendor.
- The total number of students on the Fee Code Total report should match the number of participants. If not, someone has not been charged.
- If the fee is waivable, it will show as paid on the Fee Code Total report regardless of whether it was paid or waived.
Pre-billing student fees is recommended

Fees can be entered into the Student Account System, Skyward, as soon as they are known for mandatory fees such as participation as well as optional fees including student travel, spirit packs, etc.

Benefits to pre-billing fees include:
- Parents can see how much is owed through Family Access
- Parents can pay fees on-line with a credit card at any time
- Coaches/Advisors can request a report to see amounts owed
- Year end fine sheets may be reduced or simplified
- Student fees are more likely to be paid
- Students are billed correctly and consistently

Work with your Financial Secretary to determine the best method for charging fees to student accounts.
Develop a Budget

At the beginning of the year/season, it is a good idea to work with students, parents, other coaches and the principal to establish a budget. The budget should take into account expenses incurred for clothing/uniforms, student travel, food for the activities, supplies, transportation, and other optional items. The budget may be used to establish fundraising goals, spirit pack fees, travel and other optional fees.

Participation fees should **not** be included in the budget of a team/activity. The amount charged for the participation fee is set by the Jordan School Board. Money collected for participation is deposited into a specific account within the school. Participation fees are used by the school to pay for referees, transportation, security, and other essential costs. Participation fees remain at the school; they are not transferred to the District.

The Jordan School District Board of Education has established the required participation fees as well as the maximum spirit pack fees. The list of fees for the current year can be found at: [http://www.jordandistrict.org/schools/enrollment/schoolfees/](http://www.jordandistrict.org/schools/enrollment/schoolfees/)
This is an example of what a budget worksheet might look like for an activity

<table>
<thead>
<tr>
<th>Estimated Revenue:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Student Fees</strong></td>
<td><strong># of Students</strong></td>
</tr>
<tr>
<td>Spirit Pack</td>
<td>40</td>
</tr>
<tr>
<td>Travel</td>
<td>35</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>$</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fundraisers**</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Description:</td>
</tr>
<tr>
<td>Cookie Dough</td>
</tr>
<tr>
<td>Estimated Net Proceeds</td>
</tr>
<tr>
<td>Amount of Proceeds to be applied to Student Fees listed above</td>
</tr>
<tr>
<td>2) Description:</td>
</tr>
<tr>
<td>Yard Sale</td>
</tr>
<tr>
<td>Estimated Net Proceeds</td>
</tr>
<tr>
<td>Amount of Proceeds to be applied to Student Fees listed above</td>
</tr>
<tr>
<td>3) Description:</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Estimated Net Proceeds</td>
</tr>
<tr>
<td>Amount of Proceeds to be applied to Student Fees listed above</td>
</tr>
</tbody>
</table>

Subtract the estimated amount of fundraiser proceeds which will be applied to student fees from the net proceeds to eliminate double counting revenue.

**Total Revenue**

$30,050.00

**Estimated Expenses (total costs):**

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uniforms</td>
<td>$28,080.00</td>
</tr>
<tr>
<td>Travel (35 students + 4 advisors/chaperons @ $720/each)</td>
<td>$300.00</td>
</tr>
<tr>
<td>Food</td>
<td>$500.00</td>
</tr>
<tr>
<td>Supplies</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>Registration</td>
<td>$750.00</td>
</tr>
<tr>
<td>Tournaments</td>
<td>$680.00</td>
</tr>
<tr>
<td>Spirit Packs (polo shirt) (40 students @ $17.00/each)</td>
<td>$</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>$</td>
</tr>
</tbody>
</table>

**Total Expenses**

$31,310.00

**Net Increase/Decrease (Total Revenue - Total Expense):**

$ (1,260.00)

**Program Balance at the beginning of the year**

$1,500.00

**Estimated Program Balance at the end of the year**

$246.00

* Should be in accordance to fees approved by the Jordan School District Board of Education

** Should be in accordance to Jordan School District Policy - proper approval must be obtained
FUNDRAISERS
The principal has the ultimate responsibility over the fundraiser and should monitor all aspects of the fundraiser frequently and carefully.

District policy AA417 should be reviewed and followed.

All local school fund raising projects must be submitted in writing to the Administrator of Schools for review and approval.

All items purchased for fundraiser use are subject to district purchasing policy.

No purchase shall be made with donated money until the funds are in hand. If a donor has committed money, no purchase shall be made until the donation has been deposited into a school account and the check has cleared the donor's account. Do not make purchases based on a donor's promise with money not yet received.

If there are any questions or concerns, please call the District Accounting department prior to starting the fundraiser.
This form must be completed and approved by the appropriate Administrator of Schools prior to beginning any fund raiser.

This form can be found on the District’s website at: http://www.jordandistrict.org/wp-content/uploads/fgen_A-0430.pdf
Fundraisers – cash control

• Each sale should be carefully receipted with the date, customer name, dollar amount, person making sale, and number and type of items sold.

• Records should be maintained of all receipt books used in the fundraiser; including who was assigned a receipt book and how many were issued.

• Cash and inventory should be returned to the school as soon after the sale as possible. A reconciliation of the cash and inventory returned should be done immediately to ensure that all items or the equivalent in cash are accounted for.

• Cash should be kept at the school and secured in a locked box or safe at all times.

• All fund raising money should be deposited frequently; daily, if possible.

• A reconciliation of cash on hand, cash deposited, and all inventory should be made at least weekly to verify that all assets are accounted for.

• Prior to making a bank deposit, the receipts should be reconciled to the amount being deposited.
Fundraisers – inventory control

• All fund raising inventory should be handled as carefully as if it were cash.
• Fundraising inventory should be shipped directly to the school in the principal’s name.
• Each person taking possession of fundraising items to sell must sign that they received that quantity of goods. They are responsible for the return of those goods or the equivalent in cash.
Fundraisers – student allocation

Proceeds from a fundraiser may be allocated in one of two ways:

1) all funds are pooled and shared collectively to benefit the program or activity
2) fundraising proceeds are used to satisfy student fees for the specific student

The method used to account for fundraising proceeds can be determined on a case-by-case basis, but should be determined and disclosed to all participants in advance.

Parents should NOT be directed to make donations to the Foundation to pay their student’s fees. Donations may be made to the Foundation for the benefit of the team as a whole and to reduce the overall costs of each individual student.
Fundraiser for the Collective Benefit of the Program

All money raised is put in the program’s account for the benefit of the program as a whole and not earmarked to reduce the costs of individual students.

Money raised can be used to decrease the overall cost of the program, thereby decreasing the fees charged to individual students. All students should be required to participate in the fundraiser equally, regardless of fee waiver status. With this method, the overall proceeds from the fundraiser must be tracked, but there is no need to allocate the proceeds to the individual students.

Utilizing this method can make the accounting simpler than fundraising for the benefit of the individual student.
Fundraising for the Benefit of the Individual Student

Money raised is applied to student fees of the student that generated the money. The amount applied to student fees is typically the net proceeds from the sale of the item.

For example, a student sells cookie dough for $20 but the program must pay $12 for the cookie dough, the net amount of $8 may be applied to the student’s fees to reduce out-of-pocket costs for that student.

- The amount to be applied to student fees should be determined and disclosed to participants in advance. With this method, the application of net proceeds to student fees must be tracked in such a way that is clear and consistent.
- Tracking may be done by the main office using Skyward or may be done by the coach or advisor.

Regardless of who is tracking the funds, all monies must be deposited in the main office and should be receipted to the individual student. Coaches and advisors should coordinate efforts with the financial secretary in the main office to determine the appropriate approach. Documentation is subject to audit and should be maintained for a minimum of three years. Documentation of fees should be made available to parents when requested.
CAMPS AND CLINICS
Camps and Clinics

Jordan School District will endorse school run camps and clinics that are coordinated in accordance to the camps and clinics guidelines and District policies. Utah State Risk Management will insure the liability of camps and clinics only when conducted in compliance with these guidelines.

Detailed guidelines and forms can be found at:
http://auxiliaryservices.jordandistrict.org/facilityrentalsaccess/facilitydocuments/

Failure to follow the JSD “School Run Camps and Clinics and Clinics Guidelines” action up to and including termination.

will result in a thorough investigation and may result in disciplinary costs; otherwise the event will be cancelled.

All camps and clinics must be self-sustaining, covering associated associated.

These Guidelines, liability of camps and clinics only when conducted in compliance with District policies. Utah State Risk Management will insure the

Jordan School District will endorse school run camps and clinics that
PUBLIC AND PRIVATE ACTIVITIES
Separate Public Activities from Private

It is not uncommon for employees of Jordan School District to engage in Private but Public Education-Related Activities including, but not limited to:

- Tutoring
- Camps
- Lessons
- Travel Opportunities
- Clinics

Such activities must comply with Policy AA444.

In addition to complying with Policy AA444 the following is recommended:

- Ensure proper, accurate and detailed recordkeeping to limit confusion.
- Be clear which “hat” is being worn – if the coach or advisor is not 100% clear which role is being filled, parents and students aren’t sure either.
- Under no circumstances should money be comingled – a student cannot receive “credit” for school fees by paying or participating in a private activity or vice versa.
- Keep activities transparent - the more communication the better.
- Employees may not solicit students or parents to purchase equipment, supplies or services, or to participate in activities from which they personally benefit except as permitted in Policy AA444.
OTHER IMPORTANT POLICIES
Skyward

All school revenue and expenses MUST go through the main office and tracked in the District’s financial accounting program, Skyward.

For example, a coach may not take proceeds from concession sales to purchase additional concession items or supplies for the team.

Instead, all proceeds from concession sales must be receipted in the main office, crediting the appropriate account. The school can then issue a check from this same account to purchase the additional concession items. The coach could use personal funds to buy the items needed and seek reimbursement from the school, obtaining prior authorization.
Bids

Any purchase >$2,000 (multiple items) or >$1,000 (single item) must have 3 verbal bids prior to purchase.

- Document the name of the individual giving the quote, the name of the company and pertinent details regarding the quote.
- Catalogs or websites may not be used as a quote. They may be used as a starting point, but a telephone call must be made to ensure a better price is not available.

Orders should not be falsely subdivided to fall beneath the $2,000 limit.

- Anything that would be reasonably purchased together from the same vendor must be taken into consideration when determining whether bids are necessary.

Purchases >$10,000 must go through the District’s Purchasing Department.

If you have unique needs, discuss the scenario with Purchasing before ordering so Purchasing can protect you.
Student Overnight Travel

Student travel must comply with District Policies AA414, AA415, and AA416.

Familiarize yourself with these policies if you are traveling with a student group.
Background Check and Orientation

All coaches and volunteers must successfully complete a background check and attend orientation PRIOR to working. Plan ahead to allow enough time to get the results of a background check back before the start of the season/school year.

New Employee orientation is provided by Human Resources. Contact Human Resources to schedule.
ATHLETICS AND ACTIVITIES ANNUAL
FINANCIAL ACKNOWLEDGEMENT
Athletics and Activities Annual Financial Acknowledgement (AAAFA)

Each year ALL coaches and advisors are required to sign the AAAFA. The purpose of the AAAFA is to ensure coaches and advisors are aware of policies pertaining to their position and agree to follow these policies.

A copy of the AAAFA can be found in the Appendix to the Financial Accounting Manual.

Carefully review each item prior to signing the document. If you have questions, clarify the issue before signing the document.

School principals, department chairs, and athletic directors may NOT supersede these requirements. If you feel you are being asked to violate one of these items, contact Heather Ellingson in Accounting for clarification.
Athletics and Activities Annual Financial Acknowledgement

All High School Principals, Assistant Principals, Athletic Directors, Head Coaches, Assistant Coaches, and Activity Advisors must review and sign this form, annually, before the season starts. Signed forms should be sent to and retained indefinitely by the Staff Assistant for the Administrators of Schools.

1. All funds must be deposited through the main office into the school bank account. Outside bank accounts are not allowed, even for parent-led boosters.
2. Only the front office should collect money from parents or students. Students should be asked to bring their office receipt to show proof of payment. Fundraisers, ticket sales, etc. must be coordinated with the front office.
3. All expenses must be recorded by the main office. It is not appropriate to use cash proceeds from the sale of items to buy things for the team, club, or school.
4. The coach or advisor is responsible for monitoring school, club and booster accounts within the school financial system to ensure the program is charging and collecting sufficient fees to cover expenses. Reports may be requested from the school's financial secretary.
5. The coach or advisor is responsible for ensuring students have paid the applicable fees prior to participation. Fee waiver students must obtain a receipt from the office before they are considered “paid.”
6. Booster clubs are expected to comply with District policies and procedures.
7. Purchases, including travel, require the following quotes. Dollar limits are per order, not per item and may not be divided into multiple orders in order to come in below the threshold.
   - $2,000 or more - require three documented verbal quotes. Quotes may be obtained over the phone. Catalogs, on-line information or other printed price sheets cannot substitute a verbal quote; many times companies will give a better price than those printed in catalogs or websites.
   - Over $10,000 - require three written quotes and must be on a District Purchase Order.
8. Employee and student airfare and lodging costs should be coordinated with the Purchasing Travel Buyer. Student travel must comply with policies AA414, AA415 and AA416.
9. The tax exemption form should be used anytime the school is directly paying for an item. The tax exemption form should not be used when the school indirectly pays for an item (e.g., teacher reimbursement, booster parent purchase, etc.). The tax exemption form should never be used for personal purchases.
10. Anytime school facilities are used for non-school sponsored events (i.e., club teams practices, private lessons, tournaments, leagues, etc.) use of the facilities must comply with facilities use policies DA151 and AA444. All camps and clinics held at Jordan School District facilities are to be scheduled through the Facilities Scheduling Office. Building keys do not authorize access to school facilities at any time for any purpose.
11. Required fees charged to students must be approved by the Board of Education. Any fee not approved by the Board of Education must be communicated to parents as “optional.”
12. Fundraisers must be pre-approved by your area Administrator of Schools. Fundraised revenues may be used to offset or reduce student fees only if the coach/advisor has clearly documented how the revenues were fairly applied to all participating students. Such documentation should be retained and available for review for three years.
13. It is unlawful to accept gifts, food, clothing or emoluments from a vendor or potential vendor in excess of $10 at any one time or $50 during a calendar year.
14. Faculty and staff, including myself, may not solicit students or parents to purchase equipment, supplies or services or to participate in activities from which they personally benefit except as permitted in policy AA444.
15. It is inappropriate to purchase items for personal use with school money, even if the intent is to reimburse the school.
16. The District Business Administrator is the only person authorized to sign contracts on behalf of the school or District.
17. I am not allowed to accept pay, bonuses, stipends, etc. from any source (such as but not limited to boosters, parents, or vendors) for duties related to my employment with Jordan School District except as authorized by policies and procedures of the District.

I acknowledge I have read the above summary of rules; I agree to abide by them as a condition of my employment with Jordan School District. If I have questions, I will contact my principal and/or appropriate District department.

Signature: ____________________________ Date: _____________ Printed Name: ____________________________
School: ________________________ Activity: ____________________________
Highlights of the AAAFA not specifically addressed elsewhere in this training include:

- The tax exemption form should be used any time the school is directly paying for an item. It should not be used when the school indirectly pays for an item (e.g. teacher reimbursement, booster parent purchase, etc.).
- Anytime school facilities are used for non-school sponsored events (i.e. club teams practices, private lessons, tournaments, leagues, etc.) use of the facilities must comply with facilities use policies DA151 and AA444. Building keys do not authorize access to school facilities at any time for any purpose.
- It is inappropriate to purchase items for personal use with school money, even if the intent is to reimburse the school.
- The District Business Administrator is the only person authorized to sign contracts on behalf of the school or District. This includes ALL contracts (i.e. purchase contracts, travel agreements, etc.).
- A coach/advisor may not accept pay, bonuses, stipends, etc. from any source (such as but not limited to boosters, parents, or vendors) for duties related to their employment with Jordan School District except as authorized by policies and procedures of the District.
REMINDERS
**DO**

- Work with the main office to ensure student fees are charged correctly
- Ensure all students have paid fees or obtained a waiver
- Turn in original receipts for all reimbursements & purchases
- Obtain bids
- Obtain prior approval for purchases
- Provide clear and accurate information to parents and students regarding program costs and payment deadlines
- Deposit all money through the main office

**DO NOT**

- Comingle school funds with personal funds
- Accept gifts, prizes, incentives, money or other remuneration (including meals) from vendors worth more than $10
- Purchase gift cards or allow others to purchase gift cards using school funds
- Accept money from students to pay student fees – direct them to the main office instead
- Steal money, equipment or assets
- Use school/District assets for personal gain
The Accounting Department and other District Departments are here to help you succeed. Please do not hesitate to call with questions or concerns.

Important Contact Information:

**Accounting**
- John Larsen  Director of Accounting  (801)567-8148
- Heather Ellingson  Accountant/Internal Auditor  (801)567-8388
- Liz Robins  Accountant  (801)567-8267

**Purchasing**
- Kurt Prusse  Director of Purchasing  (801)567-8701
- Lisa Corbett  Administrative Assistant  (801)567-8708

**K-12 Administrators**
- Anthony Godfrey  Bingham & Copper Hills Areas  (801)567-8173
- Brad Sorenson  Herriman Area  (801)567-8166
- Michael Anderson  Riverton Area  (801)567-8186
- Teri Timpson  West Jordan Area  (801)567-8186
- Jill Durrant  Staff Assistant  (801)567-8186

**Human Resources**
- Brent Burge  Classified Administrator  (801)567-8224
- Travis Hamblin  Licensed Administrator  (801)567-8215