

Gifts, Grants, and Bequests

A. Purpose and Scope

This administrative regulation provides guidance to control the acceptance of various types of gifts, grants, donations, and bequests made to the Tracy Unified School District.

B. General

The Governing Board may accept any bequest or gift of money or property on behalf of the district. While greatly appreciating suitable donations, the Board discourages any gifts which may directly or indirectly impair its commitment to providing safe and equal educational opportunities for all district students.

Before accepting a gift, the Board shall consider whether the gift:

1. Has purpose consistent with the district's vision and philosophy
2. Begins a program which the Board would be unable to continue when the donated funds are exhausted
3. Entails undesirable or excessive costs
4. Implies endorsement of any business or product

The Board shall carefully evaluate any conditions or restrictions imposed by the donor in light of district philosophy and operations. If the Board feels the district will be unable to fully satisfy the donor's conditions, the gift shall not be accepted.

Gift books, instructional materials, furniture or equipment shall be accepted only if they meet regular district criteria.

All gifts, grants and bequests shall become district property, but gifts may be used at a particular school site per donor request and upon board approval.

The Superintendent of schools shall set up criteria to be met in the acceptance of gifts, and the procedure for examining and evaluating offers of gifts to the district.

C. Forms Used and Additional References

Bank Deposit Slip

Donations requiring board approval as described in the procedures below, shall include a Standard District Donation Acceptance Letter. The letter should be forwarded to the Business Services Division and shall include:

1. the name, address and phone number/e-mail address of the individual or company making the donation.

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2. a description of the specific item being donated including make, model, serial number, etc. as appropriate.
3. the estimated value of the donation. The preferred documentation of valuation should include proof of purchase and age of the material. If proof of purchase is not available, an estimate may be provided.
4. the specific site/location where the donation is to be located or used.
5. a brief narrative with background information describing why the donation is being made and any other information that may be of interest or value to the school board.

The Business Services Division will place the donation on a board agenda for approval. After acceptance, the Director of Materials Management will coordinate any marking, inventory or distribution needs with the district warehouse. All items requiring marking must be delivered to the warehouse for handling. Items will not be picked up or marked at the site.

District Donation Form Letter

D. Procedure**General Procedure:**

1. Donations with a value of less than \$500 may be accepted by site or district personnel without board approval. However, the recipient of the donation must ensure appropriate accounting and oversight is provided to ensure proper handling of the donation.
2. All donations with a value of \$500 or greater must be approved by the board prior to the donation being accepted on site or utilized by district staff or students. These donations, if of a non-cash nature, must include proof of ownership, must be marked for inventory and insurance purposes.
 - i. All donations requiring board approval shall be accompanied by a letter from the person or company making the donation, preferably on letterhead. A copy of a check (or other proof of purchase or ownership) must be attached to the letter for proof of ownership and valuation of the item.
3. The district strictly forbids acceptance of any donation that promotes or seems to promote the use of alcohol, tobacco, or illicit drug products.
4. All sites and departments share the responsibility associated with the safe handling, movement, and disposal of equipment and materials. This includes, but is not limited to, the costs for removal and disposal of computers and related peripherals, copiers, and other equipment and supplies.

Cash Donation Procedures:

1. All cash or money donations must be deposited into the TUSD Misc Clearing account. A record of the entire backup, including copies of checks, deposit slip, and any other documents must be kept at the site/dept. This deposit will be picked up by a TUSD Warehouseman or armored car service and taken to the bank. A separate e-

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mail will be forwarded to the Accounts Receivable section describing the bag number, the amount, the account number, the donor's name and address, and the intended use of the donation.

Non-Cash Donation Procedures:

1. All non-technology related equipment donations shall be inspected and approved by a district purchasing representative to ensure compliance with safety and quality standards.
2. All technology related equipment donations must be approved by the Director of Information Services and Educational Technology.

E. Reports Required

An inventory of all equipment valued at or above \$500 must be conducted annually.

F. Record Retention

None.

G. Approved by Administrator of Division

Assistant Superintendent for Business Services

TUSD Acknowledged: N/A

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Date: _____

To: **Tracy Unified School District Board of Trustees**

From: _____
Donor individual or Group

Subject: **District Donation**

Please accept the donation described below, which is valued at \$_____.
Documentation of ownership for all equipment and other donated non-cash or money items is attached.

Description:

Signature