

## **Noninstructional Operations and Business Services**

### **Acceptance of Gifts, Donations and Bequests**

#### I. Purpose

This policy regulates the acceptance of gifts, donations and bequests to the school district.

#### II. General Statement of Policy

The school district will only accept gifts, donations and bequests that are consistent with the school district's mission and are in compliance with local, state and federal laws. Neither the district, nor any district employee or other person acting on behalf of the district may accept any donation, gift or bequest unless such acceptance is in compliance with this policy. Once accepted, all gifts, donations and bequests become the property of the district.

#### III. Definitions

- A. Employee position: An employee of the district meeting all district requirements and being compensated by the district.
- B. Seasonal employee position: An employee working an established number of days for a district-approved activity or event, meeting all district requirements, and being compensated by the district.

#### IV. Acceptance of Gifts, Donations and Bequests

- A. The school district may receive gifts, donations and/or bequests ("gifts"). The term "gifts" includes in-kind gifts. The following factors will be considered by the district when deciding to accept or reject gifts:
  - 1. Does the gift have a purpose that furthers the mission of the district?
  - 2. Does the gift place restrictions on the district's use of the gift?
  - 3. Does the gift imply an endorsement of any business or product?
  - 4. Does the gift have unsustainable, ongoing expenses that require substantial funding?
  - 5. Does the gift create inequities between programs or sites?
- B. The district will not accept a gift that contains restrictions or conditions that conflict with local, state or federal laws, district policies or contracts to which the

district is a party. The district will not accept a gift which, in its sole discretion, it determines to pose a risk to the health and/or safety of the district's students, employees or other individuals.

- C. Individuals and groups desiring to make a contribution in support of a specific school or program, as opposed to a gift for the general benefit of the district, will communicate with the principal of the school, the program administrator or the superintendent. The contributor will describe the nature and the extent of the gift.
  - D. A written contribution proposal is required for all contributions exceeding \$5000, to be submitted to the site principal or program director (see Appendix II, Contribution Proposal).
  - E. The superintendent or designee is authorized to accept gifts of less than \$1000 on behalf of the district. The gift must further the mission of the district or a specified program.
  - F. The school board is authorized to accept gifts of \$1000 or more on behalf of the district. The gifts must further the mission of the district or a specified program.
  - G. The school board may accept a gift of real or personal property only by the adoption of a resolution approved by two-thirds of its members. The resolution must fully describe any conditions placed on the gift.
  - H. The school board will have the sole authority to determine whether a gift, precondition, condition or limitation on use; included in a proposed gift; furthers the interests of or benefits the district and whether it should be accepted or rejected.
  - I. The school board is authorized to accept all financial gifts offered by the Edina Education Fund. The gifts must further the mission of the district or a specified program.
- V. Proposal for Donation to Support a Specific Need
- A. The district will consider accepting donations for a specific school, program or district need when a school or district organization or partnership cannot be identified or accessed to support the specific need. The need can be brought forward by staff or community members.
  - B. The specific need and donation process – including potential fundraising – will be formally submitted in a proposal to the director of business services. The director will review the proposal and determine the best option for addressing the need. The options include directing the proposal for consideration to:
    - An existing fundraising, booster or partnership organization;
    - An organization or agency outside of the district's organizations and

- partnerships (i.e., county, city or state entities);
- The administrative leadership team, which will review and consider the proposal based on Section IV.A., above.

C. The administrative leadership team's consideration will result in:

- Approving the proposal and defining the district's funding account to be used to execute the proposal; or
- Modifying the proposal to meet parameters established by district policy, and then approving the proposal and defining the district's funding account to be used to execute the proposal; or
- Rejecting the proposal.

The decision of the administrative leadership team is final.

VI. Administration in Accordance with Terms

If the school board agrees to accept a gift that contains preconditions, conditions or limitations on use, the district will administer the gift in accordance with those terms.

VII. Donation Recognition

- A. The school district will provide recognition for gifts less than \$1000 at the school site or program level. The recognition will be shared in accordance with the Minnesota Government Data Practices Act and other applicable laws.
- B. The district will provide recognition for gifts equal to or more than \$1000 at a school board meeting through official school board action (consent agenda). The recognition will be shared in accordance with the Minnesota Government Data Practices Act and other applicable laws.

VIII. Memorial Gifts and Recognitions

Gifts and/or requests in memory of an individual, group or event will be limited to contributions to the Edina Education Fund with memory recognition options to student scholarships, personalized pavers (at Edina High School) or targeted educational programs. Memorials will not be accepted for furnishings or plantings. This provision does not prohibit class contributions to individual schools.

IX. Staffing Position Through a Gift; Conditions

- A. The school board may approve the funding of a district employee position through a gift when the following conditions are met:
  1. The position has been identified by the school board and supports an innovative initiative supported by the Edina Education Fund.

2. The position does not create inequities among schools and/or comparable programs and services.
- B. The school board may approve the funding of a district seasonal employee position through a gift when the following conditions are met:
1. The funding need for the position has been preapproved by the administration.
  2. The gift source and plan have been approved by the administration.
- C. The acceptance of a gift does not obligate the district to hire any particular individual, permit any individual to provide volunteer services to the district, or in any way affect the district's control over its employees, property or functions.
- D. Inquiries about staffing positions through gifts will be made to the director of business services.

Legal References:

Minn. Stat. Ch. 13 (Minnesota Government Data Practices Act)

Minn. Stat. § 123B.02, Subd. 6 (Bequests, Donations, Gifts)

Minn. Stat. § 465.03 (Gifts)

Cross References:

Policy 629 (Student Fundraising)

Policy 912 (Partnerships – Community Organizations, Governmental Entities, Educational Institutions, and Other Organizations)

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INDEPENDENT SCHOOL DISTRICT 273  
 Edina, Minnesota

Appendix I to Policy 709

GUIDELINES FOR FINANCIAL SUPPORT OF SCHOOLS  
AND SCHOOL-SPONSORED GROUPS

A. District Support of Schools and School-Sponsored Groups

- Staffing, instructional supplies, equipment and capital items required to meet the educational obligations and requirements of the school district.
- Funding is sustainable based on available revenues.
- Expenditures prioritized and follow policies and guidelines established by the school board.
- All funds approved through school board action in the budgeting process.
- The source of funds is federal, state and local tax dollars.

B. Edina Education Fund Support of Schools and School-Sponsored Groups

- Supports educational innovations aligned to the strategic roadmap through major initiatives and competitive innovative grants.
- Administrative direction required to assist in developing priorities and establishing expenses related to innovative efforts.
- Funding is not required to be sustainable, but must further the mission of the district or a specified program. Financial support for more than one year may be committed to major initiatives that have developed a tentative financial plan to continue to support a school or program.
- All funds must be approved in the manner prescribed by this policy as a contribution to the district that meets policy guidelines.
- The source of funds is private donations, corporate donations and fundraising events.

C. Community Organizations, Parent Organizations and Booster Groups Support of Schools and School-Sponsored Groups

- Instructional supplies and equipment, technology equipment, and major capital items pursued to enhance the success of a school and/or school group, based on priorities identified by the school's administration and/or site leadership team.
- All expenditures, including technology, must meet district guidelines and procedures, align with the strategic roadmap and educational directives, and account for ongoing maintenance expenses.
- Funding is not allowed for staffing positions without prior school board approval.
- All funds must be approved in the manner prescribed by this policy as a contribution to the district that meets policy guidelines.
- The source of funds is private donations, corporate donations and fundraising events.

Appendix II to Policy 709

CONTRIBUTION PROPOSAL

A written contribution proposal is required for all contributions exceeding \$5000. Please complete the following questionnaire and submit to the site principal or program director.

Amount/value of gift: \_\_\_\_\_

1. Describe how the gift furthers the mission of the district.

\_\_\_\_\_  
\_\_\_\_\_

2. Are there any restrictions on the district's use of the gift?

\_\_\_\_\_  
\_\_\_\_\_

3. Does the gift imply an endorsement of any business or product?

\_\_\_\_\_  
\_\_\_\_\_

4. Describe in detail any ongoing expenses the district may incur if the gift is accepted.

\_\_\_\_\_  
\_\_\_\_\_

5. Does the gift create inequities between programs or sites?

\_\_\_\_\_  
\_\_\_\_\_