

## **GIFTS, GRANTS, BEQUESTS**

### **CRITERIA TO BE CONSIDERED FOR REVIEW AND ACCEPTANCE**

The following criteria shall be considered when reviewing all proposed gifts and bequests to the school district. The superintendent or his/her designee shall evaluate all offers of gifts and recommend for Board acceptance those that satisfy the criteria:

1. Will not violate the principle of equal opportunity for all students at a given grade level and/or will not create significant inequities among district schools of similar grade levels.
2. Will not imply the endorsement of any particular business or product or any specific political or religious point of view.
3. Will not be in conflict with any provisions of state or local laws and regulations.
4. Will have a purpose consistent with the goals of the educational program.
5. Will not be inappropriate or harmful to the welfare of students.
6. Will not result in excessive maintenance, installation, or unacceptable continuing costs to the district.
7. Will not restrict or otherwise limit the school program.
8. If the gift constitutes a piece of equipment, it meets accepted quality, performance and safety standards.
9. If the gift constitutes a book (or set of books) it appears on the approved list of a recognized professional library/association and/or is deemed by the Superintendent or his designee(s) to be acceptable and of educational value.
10. Does not involve funds raised wholly or partially through anonymous or unidentified solicitation.

### **PROCEDURE FOR REVIEW AND PRESENTATION OF GIFTS**

1. A prospective donor of a gift shall be requested to outline in advance the intent of the gift and to specify any particular preferences the donor might have. The purpose of this preliminary review procedure shall be to help determine the appropriateness of the gift offer and to review in advance any fund-raising projects(s) to be held in connection with the proposed gift.
2. Gift offers with a cash value of \$250 or less shall be reviewed in advance by the school's principal(s), if the proposed gift involves a particular school or schools. Gifts with a value of \$250 or less, but which are not intended for a specific school or schools, shall be reviewed by the Superintendent or his/her designee.
3. Gift offers with a cash value of more than \$250 but less than \$2,000 shall be reviewed in advance by the Superintendent or his/her designee.
4. Gift offers with a cash value of more than \$2,000 shall be reviewed in advance by the Board of Trustees.
5. It shall be the responsibility of the Superintendent to develop and disseminate the specific procedures for the review and presentation of gifts, including a standard district form on which the prospective donor may outline the gift, cite any preferences for its use, and identify the

fund-raising activities, if any, that are planned.

6. The Superintendent shall have the prerogative, however, of waiving the normal review process in highly exceptional instances where the gift offer is spontaneous or of nominal value.

**INVOLVEMENT OF SCHOOL PERSONNEL IN GIFTS**

1. School personnel shall not request or encourage a group or individual to present a gift or to raise money for such. Once a gift has been proposed, employees may suggest possible ways the gift may be used and may plan a supportive role in any related fund-raising effort.
2. Until such time as it is accepted by the Board and received by the District, however, a gift or any funds related to such shall not be used or handled by school personnel.

**ACCEPTANCE OF GIFTS**

Final acceptance or rejection of gifts shall rest with the Board. Once accepted by the Board, all gifts, grants and bequests shall become the property of the school district and a letter of appreciation shall be forwarded to the donor(s).

**SAN DIEGUITO UNION HIGH SCHOOL DISTRICT**

**Gifts, Grants and Bequests**

All proposed gifts, grants or bequests to the San Dieguito Union High School District or to an individual school site must be outlined in advance and include the donor's intent along with any particular preferences to be considered by the administration in accepting the offer. All proposals will be reviewed according to the following criteria:

1. Will not violate the principle of equal opportunity for all students at a given grade level and/or will not create significant inequities among District schools of similar grade levels.
2. Will not imply the endorsement of any particular business or product or any specific political or religious point of view.
3. Will not be in conflict with any provisions of state or local laws and regulations.
4. Will have a purpose consistent with the goals of the educational program.
5. Will not be inappropriate or harmful to the welfare of students.
6. Will not result in excessive maintenance, installation or unacceptable continuing costs to the District.
7. Will not restrict or otherwise limit the school program.
8. If the gift constitutes a piece of equipment, it meets accepted quality, performance and safety standards.
9. If the gift constitutes a book (or set of books) it appears on the approved list of a recognized professional library agency/association and/or is deemed by the Superintendent or his designee(s) to be acceptable and of educational value.
10. Does not involve funds raised wholly or partially through anonymous or unidentified solicitation.

Date: \_\_\_\_\_ School Site and Department \_\_\_\_\_

I propose to offer the following gift, grant or bequest:

Special preferences that I/we would like for the administration to consider when reviewing the offer:

Name(s) of Potential Donor(s)	
Address:	Phone:
City, State, Zip:	Email:

I have reviewed the gift proposal according to the criteria set forth in Board policy and recommend acceptance.

Administrator's Signature:	Print Name:
Phone:	Email:

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