

SAN LORENZO UNIFIED SCHOOL DISTRICT BOARD POLICY

Business and Noninstructional Operations

BP 3290 (a)

GIFTS, GRANTS AND BEQUESTS

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 equal educational opportunities for all district students.

All gifts, grants and bequests shall become district property. All donations and gifts, including checks, cash, awards and grants must be written to a school, program, or project and NOT to a teacher or district employee. A teacher may accept a donation of classroom supplies.

Only gifts, grants, bequests, and/or donations that are approved by the Board shall be considered property of the district. The Superintendent may accept, on behalf of the Board, any such gift less than \$500.00 in value.

No gifts or donations will be accepted if the Board determines that the likely purpose of the gift or donation is an attempt to influence the Board, or any employee, in decisions, policies, or regulations.

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

1. Has a purpose consistent with the district's vision, philosophy and educational program
2. Begins a program which the Board may be unable to continue when the donated funds are exhausted
3. Entails undesirable or excessive costs, including maintenance and support
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. All non-monetary items (books, supplies, equipment, furniture, etc.) obtained are the property of the San Lorenzo Unified School District and all inventory procedures apply. Inventory procedures shall be followed with the support of Business Services. If the Board feels the district will be unable to fully satisfy the donor's conditions, the gift shall not be accepted.

Appropriate staff shall acknowledge the receipt of any gift accepted by the district.

STAFF FUNDRAISING/CROWDFUNDING

The principal/director supervisor must pre-approve a fundraising or crowd funding initiative PRIOR to it being posted on a crowdfunding platform. Please use the Proposal for Employee Fundraising form.

All fundraising activities must be fully compliant with all Board Policies.

PROCEDURES FOR RECORDING AND DEPOSITING FUNDS

The District may invest gift monies not immediately needed. Such funds shall be placed in a district special fund in the county treasury, and designated as the Foundation Trust Fund.

Funds donated for specific purposes shall be placed in a separate account in that trust fund. If funds are placed in a Foundation Trust Fund an advisory committee shall be appointed by the Board to recommend related rules and regulations and oversee investments to be made. (Education Code 41035, 41036 and 41037)

The handling of gifts, donations, and fundraising proceeds is as follows:

1. District employees, who receive public funds in the form of gifts, grants, donations, or fundraising proceeds by cash, check, or any other form, must transmit those monies within one working day of receipt to the school's Associated Student Body (ASB) account or to District Business Services Department.
2. Student body banking account must be reported to and audited by the Business Department.
3. If the funds are earmarked for use by a particular school or program, the Business Services Department will put them in a separate account for use by that school or program;
4. All non-profit organizations (PTA, PTO, PTSO, Parent Booster, etc.) which receive funds intended to benefit the District, a District program or school, shall be subject to District oversight and reporting requirements in accordance with agreements between the District and the non-profit organization;
5. District staff are prohibited from holding un-reported or un-deposited public funds, and prohibited from opening or operating any banking or checking account which contains public funds, without the express written authorization of the Assistant Superintendent of Business Services.

All cash or equipment donations valued at \$500 or more must be accepted by the Board of Education at one of their regular Board meetings. Gifts/donations make up the "Gift Report" on the Board agenda.

Please inform the Business Department immediately upon receipt of any gift/donation/fundraising valued at \$500 or more. Following are steps necessary in reporting gifts/donations/fundraising:

1. Gifts/donations/fundraising valued at \$500 or more arrives at school. If donation is equipment, etc., email the Assistant Superintendent of Business Services with name and address of donor and value of item.
2. When a check is received, email the Assistant Superintendent of Business Services with donor contact name and address and state how the donation will be used.
3. Send a copy of the check to Business Services.
4. Send a copy of the Proposal for Employee Fundraising form (for fundraising deposits)

Legal Reference:

EDUCATION CODE

1834 Acquisition of materials and apparatus

35162 Power to sue, be sued, hold and convey property

41030 School district may invest surplus monies from bequest or gifts

41031 Special fund or account in county treasury

41032 Authority of school board to accept gift or bequest; investments; gift of land requirements

41035 Advisory committee

41036 Function of advisory committee

41037 Rules and regulations

Board Adopted: October 17, 2017