

Board Policy DFK: Gifts and Bequests

Status: DRAFT - 2nd Reading

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RED LINE VERSION

Gifts and Bequests

PUBLIC DONATIONS

I. Donation Consideration:

- A. No donation will be accepted that permanently alters the physical plant without the approval of the Superintendent or his/her designee. That approval will be based on the review of a detailed plan for the alteration or proposed construction and on the following criteria:
 - 1. The donation must enhance the programs and services normally provided by the school or must add to the beauty of the facilities.
 - 2. The donation, if in the form of goods or equipment, must be in acceptable condition and must not need repair.
 - 3. The donation will become the property of the DeKalb County Board of Education ("Board") and shall be subject to reallocation at another site without consultation with the donor.
 - 4. The donation may or may not be repaired or replaced as it becomes damaged or obsolete.
 - 5. When applicable and/or necessary as determined by the DeKalb County School System ("School System,"), proof of title must be presented by the donor upon request by the School System.
- B. No donation of physical education materials or equipment or playground equipment will be accepted, unless it meets with the safety standards and the guidelines set forth by the appropriate district administrator.
- C. No donation will be accepted that does not benefit or promote the instructional program or beautify the facilities of the Board.
- D. An accepted item which requires installation must be installed by the Department of Plant Services and Development. Upon receipt of any donation, the donation receipt form 7241463/480 must be completed and copies properly distributed. All donations that exceed \$5,000.00 in value will be formally presented to the Board by the Chief Operations Officer or his/her designee.
- E. The donation must not obligate the Board to a continuation of funding without approval by the Board prior to the acceptance of the donation.
- F. The donation must not imply endorsement of any business, commercial product, political party, or unacceptable philosophy. Public recognition of the donation does not imply endorsement of the above.
- G. Donations shall be accepted without promise or expectation of any benefit whatsoever to the donor.

II. Guidelines for Submittal and Acceptance

The Board and the staff of the School System recognize and appreciate the valuable support from individuals, PTA and community groups, and others in the contribution of cash and material gifts. Because of concern for the safety and well-being of DeKalb County children and School System staff and employees, however, certain specifications must be met before donations will be accepted and certain procurement procedures must be followed after acceptance. The criteria and procedures to be followed for submittal and acceptance of specific types of donations are as follows:

Gifts and Bequests Overview

The DeKalb County Board of Education reserves the right to approve or decline any donation not consistent with the district's educational mission, values, or equity goals. Any donation that is expressly conditional upon the district's use for a specified purpose, involves real property, or obligates the district to future operating, maintenance, or replacement costs requires board approval. Routine donations of supplies, instructional materials, or minor improvements that do not create ongoing obligations may be accepted through administrative approval. The following table outlines the required level of approval based on the value of the donation.

Approval From	Donation Amount
Board of Education	More than \$30,000
Superintendent	\$10,001 - \$30,000
Principal	\$10,000 or less

Donations, bequests, or gifts made through the DeKalb Schools Educational Foundation, Inc. are district property and are subject to the same thresholds, review processes, and approval requirements established in regulations.

A. Monetary Gifts

1. Monetary gifts for special projects: Monetary gifts made to the School System to be utilized for proposed construction or improvement projects (all projects to build a new structure or add to, modify or renovate any building structure or grounds). Monetary gifts for special projects may be made by outside organizations, individual citizens from the community, and/or groups affiliated with the School System (i.e., parents, booster clubs, PTAs, etc.) that are approved by the Superintendent and the Board;

All monetary gifts for special projects must be approved by the Superintendent. All monetary gifts to be used for special projects must be transferred to the School System and the School System must be the entity that enters into any written agreement with contractors to perform work for the proposed construction/improvement project. The School System, with use of the gifted funds, will be responsible for obtaining any services needed for the project and for securing qualified contractors for the project pursuant to Board Policy DJE and applicable state law regarding public entity bidding. Notwithstanding any other language in this policy, all monetary gifts for special projects that exceed \$5,000.00 must be presented to the Board for formal acceptance and approval.

The individual and/or organization wishing to make a monetary gift to the School System for a special project must work in conjunction with the school or director affiliated with the facility to which the proposed construction or improvement will be made and must adhere to the following approval procedure:

The principal/director must provide the appropriate district administrator with a detailed memorandum regarding the proposed project that must include the following information:

- General description of proposed construction work to include exact location and size;
- Sources of funding and amount of funding to be gifted;
- Any obtained estimates for the proposed construction work (including any consultant services);
- Any plans or specifications created for the proposed construction work;
- Understood scope of work to be undertaken for the proposed construction work;
- Proposed time frame for construction and known impact of the proposed construction on the school and students;
- A copy of any agreement or contract entered into by any person or organization responsible for the monetary gift and any consultant firm providing services for or related to the

proposed construction work;

The district administrator will review the memorandum and any supporting documents or plans and determine accuracy, completeness, and the feasibility of the proposed construction/improvement project. The district administrator will communicate to the principal/director as to whether any additional information is needed and as to any concerns regarding the intended construction/improvement project and funding.

The district administrator will notify the principal/administrator once approval of the proposed construction/improvement project and its funding has been granted. Any changes to the scope of work, including time frame for construction work, will be communicated with the notice of approval.

2. Monetary gifts for goods and/or equipment: Monetary gifts intended for a specific school, department or for the School System as a whole to secure goods (i.e., uniforms, training materials, etc.) and/or equipment (computers, exercise equipment, media equipment, etc.).

All monetary gifts intended to secure specific goods and/or equipment must be approved by the Superintendent. All monetary gifts for goods and/or equipment that are over \$5,000.00 must be transferred to the School System and the School System must be the entity that enters into any written agreement with contractors to obtain and supply the goods and/or equipment. The School System will be responsible for obtaining vendor quotes and/or bids for the goods and/or equipment pursuant to Board Policy DJE. Notwithstanding any other language in this policy, all monetary gifts for goods and/or equipment that exceed \$5,000.00 must be presented to the Board for formal acceptance and approval.

The individual and/or organization wishing to make a monetary gift to secure goods and/or equipment for any school or department in the School System must work in conjunction with the appropriate school principal or center director to ensure appropriateness of the goods and/or equipment and to provide written notification to the appropriate district administrator of the proposed gift.

B. Equipment

1. The Superintendent or his/her designee will determine if equipment or goods to be donated meet any bidding specifications for that type of equipment or goods that is already in use in the School System.
2. Equipment and/or goods not in use in the School System and/or for which no bid specifications exist must be researched and inspected by the appropriate designee from either the Operations Division or the Instructional Department, or both, to ensure compliance with school system standards, goals, etc.
3. An accepted item that requires installation must be installed by the Operations Division and/or a system approved or selected vendor/bidder.
4. Upon receipt of any equipment donation, the Donation Receipt Form 7241463/480 must be completed and copies properly distributed. All donations of equipment or goods that exceed \$5,000.00 in value will be formally presented to the Board for acceptance and approval.

C. Real Property

1. The Board shall not act as trustee or manager of any trust or fund. Although the Board may accept donations of real property, individual Board member is authorized to accept donations of real property or to establish trusts or funds for the benefit of any School System student on behalf of DCSS.

Trust and Real Property

The board will not serve as trustee or manager of any trust or fund. The board may accept donations of real property, but no individual board member can accept real property or establish trusts or funds on behalf of the district or its students. The superintendent or designee will establish a valuation of any donation and may require the donor to provide a valuation or documentation of actual costs incurred. All donations of real property require board approval before acceptance.

Special Projects

Monetary gifts for special projects, including construction, renovation, or improvement of school facilities, must be approved by the superintendent and comply with Board Policy DJE and applicable procurement laws. Such projects must be managed through the district's procurement processes, and the district will be the contracting entity for any related work. When applicable, proof of title must be presented by the donor upon request by the district.
