



Santa Ana Unified School District

BOARD POLICY NO: 3290

EFFECTIVE: 07/27/2021

SUBJECT: Gifts, Grants and Bequests

CATEGORY: Business and Noninstructional Operations

RESPONSIBLE OFFICE(S): Business Services, Accounting Department

SCOPE:

To provide guidelines relating to the acceptance and processing of gifts, donations, grants and bequests on behalf of Santa Ana Unified School District.

POLICY:

The Governing Board may accept any gift, grant, or bequest of money, property, or service to the District from any individual, organization, foundation, or public or private agency that desires to support the District's educational program. While greatly appreciating suitable donations, the Board shall reject any gift which may directly or indirectly impair its authority to make decisions in the best interest of District students or its ability or commitment to provide equitable educational opportunities. (cf. 0200 - Goals for the School District) (cf. 0410 - Nondiscrimination in District Programs and Activities) (cf. 0415 - Equity) (cf. 1260 - Educational Foundation) (cf. 9270 - Conflict of Interest)

Before accepting any gift, grant, or bequest, the Board shall carefully consider any conditions or restrictions imposed by the donor to ensure their consistency with the District's vision, philosophy, and operations. If the Board believes the District will be unable to fully satisfy the donor's conditions, the gift shall not be accepted. (cf. 0000 - Vision) (cf. 0100 - Philosophy)

In addition, the Board shall ensure that acceptance of the gift, grant, or bequest does not:

1. Involve creation of a program which the Board would be unable to sustain when the donation is exhausted
2. Entail undesirable or excessive costs
3. Promote the use of violence, drugs, tobacco, or alcohol (cf. 5131.6 - Alcohol and Other Drugs) (cf. 5131.62 - Tobacco)
4. Advertise or endorse the use of non-nutritious food or beverages during the school day (cf. 5030 - Student Wellness)
5. Encourage or enable the violation of any law or District policy
6. Imply endorsement of any business or product or unduly commercialize or politicize the school environment (cf. 1325 - Advertising and Promotion)

Any gift of books or instructional materials may only be accepted if they meet District criteria for selection of instructional materials. (cf. 6161.1 - Selection and Evaluation of Instructional Materials) (cf. 6161.11 - Supplementary Instructional Materials)



Santa Ana Unified School District

BOARD POLICY NO: 3290

EFFECTIVE: 07/27/2021

SUBJECT: Gifts, Grants and Bequests

CATEGORY: Business and Noninstructional Operations

RESPONSIBLE OFFICE(S): Business Services, Accounting Department

All gifts, grants, and bequests shall become District property. Donors are encouraged to donate all gifts to the District rather than to a particular school, classroom, or teacher. At the Superintendent or designee's discretion, a gift may be used at a particular school or classroom.

When any gift of money received by the District is not immediately used, it shall be placed in the county treasury in accordance with law. (Education Code 41030-41031) (cf. 3430 - Investing)

The Superintendent or designee shall annually provide a report to the Board indicating the gifts, grants, and/or bequests received on behalf of the District in the preceding fiscal year. The report shall include a statement of account and expenditure of all gifts of money and an inventory of all gifts of physical assets. (cf. 3440 - Inventories) (cf. 3460 - Financial Reports and Accountability)

Corporate Sponsorship

The Board may enter into an agreement or arrangement with an outside entity for the sponsorship of an educational, athletic, or other program or activity. When appropriate, the agreement may allow the outside entity to advertise or promote its business, product, or service in District publications or on District property or web sites. (cf. 1113 - District and School Web Sites) (cf. 1700 - Relations Between Private Industry and the Schools) (cf. 3312 - Contracts) (cf. 6145.2 - Athletic Competition)

Every sponsorship agreement shall be in writing and shall be approved by the Board. The Board shall ensure that the District's relationship and arrangement with the sponsor are consistent with the District's mission, values, and goals. Any advertising or promotional message, image, or other depiction to be used by the sponsor shall meet the standards set for commercial advertising on District property and in District-sponsored publications in accordance with BP 1325 - Advertising and Promotion.

Each sponsorship agreement shall contain statements including, but not limited to:

1. The purpose of the relationship with the sponsor, details of the benefits to the District, and how the benefits will be distributed.
2. The duration of the agreement and the roles, expectations, rights, and responsibilities of the District and the sponsor, including whether and to what extent the sponsor is allowed to advertise or promote its products and/or services.
3. The authority of the Board to retain exclusive right over the use of the District's name, logo, and other proprietary information and the requirement that the sponsor obtain prior approval of the Board before using such information.



Santa Ana Unified School District

BOARD POLICY NO: 3290

EFFECTIVE: 07/27/2021

SUBJECT: Gifts, Grants and Bequests

CATEGORY: Business and Noninstructional Operations

RESPONSIBLE OFFICE(S): Business Services, Accounting Department

4. The prohibition against the collection or distribution of students' personal information except as allowed by law.
5. The authority of the Board to terminate the agreement without any penalty or sanction to the District if the sponsor's message, business, or product becomes inconsistent with the District's vision, mission, or goals or the sponsor engages in any prohibited activity. (cf. 5022 - Student and Family Privacy Rights) (cf. 5125 - Student Records)

Online Fundraising

Any person or entity who wishes to conduct an online fundraising campaign, including a crowdfunding campaign, for the benefit of the District, a school, or a classroom shall submit a written request for prior approval to the Superintendent or designee. Approval of requests shall take into consideration compatibility with the District's vision and goals, core beliefs, instructional priorities, and infrastructure; the manner in which donations are collected and distributed; equity of the use of funds; and any other factors deemed relevant or appropriate by the District.

Any person or entity approved to conduct an online fundraising campaign shall comply with relevant District policies and procedures, including ensuring financial transparency in describing the purpose and use of the funds and protecting student privacy as applicable. Such person or entity shall specify that the district, rather than a staff member, classroom, or school, will own the funded resources.

Funds raised by an online fundraising campaign and donated to the District shall be subject to the same terms, criteria for acceptance, and accountability measures as any other donation as specified in this policy.

Appreciation

The Board may show appreciation for any donation to the District in any manner it deems appropriate. Such appreciation may take the form of letters of recognition or Board resolutions; plaques, commendations, or awards; planting of commemorative trees or gardens; or naming or renaming of buildings, grounds, or facilities. Conferment of any such honor shall be in accordance with applicable Board policy. (cf. 1150 - Commendations and Awards) (cf. 7310 - Naming of Facility)

DESIRED OUTCOME:

To ensure proper guidelines relating to the acceptance and processing of gifts, donations, grants and bequests are followed.



Santa Ana Unified School District

BOARD POLICY NO: 3290

EFFECTIVE: 07/27/2021

SUBJECT: Gifts, Grants and Bequests

CATEGORY: Business and Noninstructional Operations

RESPONSIBLE OFFICE(S): Business Services, Accounting Department

IMPLEMENTATION GUIDELINES AND ASSOCIATED DOCUMENTS:

District Policies and Procedures:

- BP 0410 - Nondiscrimination in District Programs and Activities
- BP 1260 - Educational Foundation
- AR 3290 - Gifts, Grants and Bequests
- BP/AR 3312 - Contracts
- BP 3430 - Investing
- BP/AR 3440 - Inventories
- BP/AR 3460 - Financial Reports and Accountability
- BP/AR 5030 - Student Wellness
- BP/AR 5125 - Student Records
- BP/AR 5131.6 - Alcohol and Other Drugs
- BP/AR 5131.62 - Tobacco
- BP/AR 6145.2 - Athletic Competition
- BP/AR 6161.1 - Selection and Evaluation of Instructional Materials
- BP/AR 6161.11 - Supplementary Instructional Materials
- BP/AR 7310 - Naming of a School/Facility
- BB 9270 - Conflict of Interest

Legal Reference:

EDUCATION CODE

- 1834 Acquisition of materials and apparatus
- 35160 Powers and duties
- 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
- 41038 Applicability of other provisions of chapter

Management Resources:

WEB SITES

California Consortium of Education Foundations: <http://www.cceflink.org>

ADOPTION AND REVISION HISTORY:

Adopted: (5-76 5-98 2-17 2-19) 7-21