

Santa Barbara Unified School District

Administrative Regulation

Business and Non-Instructional Operations

AR 3290

GIFTS, GRANTS AND BEQUESTS

The Deputy Superintendent for Business Services has been designated by the Superintendent of the Santa Barbara Unified School District (District) to be responsible for the acceptance, processing, and stewardship of gifts, as well as the coordination of all fundraising activities for the District. The District greatly appreciates private support for public education. To be most effective and serve the best interests of the District, fundraising efforts must be related to the District purpose, mission, vision, and values; be carefully coordinated; and be aligned with the District's annual planning and evaluation processes.

Gift Solicitation

In order to ensure proper coordination, all gift solicitations of funds or property in the name of Santa Barbara Unified School District must be preapproved by the Superintendent or designee. This includes fundraising activities sponsored by Associated Student Body organizations or by other student groups. The purpose of coordinating all fundraising activities through the Superintendent or designee includes:

1. To avoid conflict and duplication of efforts in the fundraising programs.
2. To maximize the contributions from each donor.
3. To provide continuity for understanding and supporting funding needs throughout the district.
4. To ensure that all gifts are properly acknowledged.
5. To ensure that accurate records of all gifts are maintained.
6. To ensure that all contributions received through a 501(c)3 nonprofit organization are properly accounted for.

Faculty, staff, and students are encouraged to undertake fundraising and solicitation activities. Anyone who seeks to engage in any fundraising activity in the name of the District from individuals, business, industry, foundations, community organizations, or others must follow the guidelines set forth in this policy. This includes approval by the Superintendent or designee of any written documents, mailing lists, and other related documents used for solicitation.

Before pursuing formal discussions with any potential donor for gifts in excess of \$50,000 for support of the District, approval is required from the Superintendent or designee.

Gift Acceptance

All gifts to the District will be accepted and processed by the Business Office. The following procedures shall apply.

1. The purpose for which the gift is given must be consistent with the stated purpose, goals, objectives, and educational philosophy of the District.
2. All gifts must be within IRS regulations governing charitable contributions and cannot be restricted for the donor's direct benefit.
3. No gift shall be accepted with an intent that is so restrictive as to make the gift's use unnecessarily difficult.

4. The nature of the gift, the identity of the donor, and the kind of program that the gift is intended to support must be carefully evaluated.
5. The cost of accepting a noncash gift must be considered in advance (i.e. delivery, storage, permanent installation, operation, and maintenance). If District funds are needed to secure, store and/or install, operate, or maintain the gift, these funds must be requested and obtained before accepting the gift.
6. Non-cash donations valued over \$1,000 (art, furniture, equipment, etc.) must be approved by the Deputy Superintendent before acceptance.

Santa Barbara Education Foundation

Depending on circumstances, some gifts and solicitations may be better directed to or through the Santa Barbara Education Foundation, an IRS 501(3) non-profit umbrella organization dedicated to the support of the District, and whose board includes community members, leaders in business and arts education, and parents, as well as members of the Governing Board, the Superintendent, and other staff as non-voting participants. In cases where there needs to be active fundraising, collaboration with other major community partners, fiscal sponsorships or independent oversight, this may be a preferable manner of proceeding.

Board Acceptance of Gifts

The Deputy Superintendent will report to the District's Governing Board the gifts offered for the benefit of the district for acceptance by the board.

Administrative Fees

An indirect cost rate shall not be applied to local donation accounts, unless the indirect cost rate was included in a memorandum of understanding approved by the Governing Board.

SANTA BARBARA UNIFIED SCHOOL DISTRICT
Santa Barbara, California May 13, 2011