



DATE: March 15, 2021

AGENDA ITEM # 4

TO: Financial Commission
FROM: Jon Maginot, Staff Liaison
SUBJECT: Review and Discussion of Gift and Donation Policy

RECOMMENDATION:

The Financial Commission to review and discuss the City's Gift and Donation Policy.

BACKGROUND

The Financial Commission during the Special Financial Commission Meeting of February 16, 2021 indicated the desire to review and discuss the City's Gift and Donation Policy.

The City's Gift and Donation Policy was originally created in 1980, and amended in 2006 to include a statement regarding employees. In May 2008, a new policy was drafted and adopted by the City Council to streamline the process and remove unnecessary Council actions and protocols for gifts and donations under the value of \$10,000.

The 2008 Gift and Donation Policy is attached.



GIFTS & DONATIONS POLICY: May 2008

PURPOSE:

The purpose of this policy is to:

- establish a threshold for staff acceptance of gifts and donations and those which will be considered by the City Council;
- cultivate and encourage donations and gifts to the City and to the community via a role performed by the municipal organization;
- establish a process for the acknowledgement of gifts and donations.

GENERAL CRITERIA:

- gifts/donations must be compatible with a public purpose and City plans, policies, programs and practices;
- the City will consider gifts/donations that are cash, material gifts and/or real property;
- the City will consider the maintenance responsibilities and other costs which may be anticipated if the gift/donation is accepted;
- the City will consider the condition of the gift/donation
- the City will consider any condition(s) attached to a proposed gift/donation before making a final decision of acceptance. Unless an agreement concerning the ultimate disposition of the gift/donation is entered into at the time the gift is accepted, it is understood that the City has sole authority to determine the use, transfer, handling and location of the gift/donation.
- gifts/donations become the property of the City upon acceptance.
- if a gift/donation is damaged after acceptance, the City shall have sole authority to determine if the damaged object should be repaired; the City may ask the donor or donor's family/heirs to consider funding all or part of the repair costs;
- for significant gifts/donations, the City Council may seek a recommendation from one of its advisory committees and/or a community organization.

PROCESS:

Upon the receipt of an offer or gift from a donor(s) and the contribution is valued at less than \$10,000, the City Manager will determine if the contribution meets the purpose and general criteria of this policy. The City Manager may seek input from others on the compatibility of the contribution to the policy's purpose and criteria. If the initial decision is affirmative, then the City Manager may accept the gift/donation on behalf of the City. The City Manager shall informally notify the City Council. A letter of thanks shall be sent to the donor(s) if the gift/donation is accepted. A letter shall be sent if the offer is not accepted explaining the reasons why the offer was found to be unacceptable.

If the estimated value of the contribution is greater than \$10,000, the matter of acceptance (or not) of the contribution shall be placed upon the agenda of the City Council for its consideration. A letter to the donor(s) shall be sent following the Council's action, informing the person(s) of the Council's decision.

The City may consider the installation of a plaque to accompany the gift, if appropriate.

This policy succeeds the first sentence in Section 23.03, Acceptance of Gifts, contained in the circa 1980 publication "Personnel Regulations."