

Unity School District - Board of Education

Board Policy ~~841~~ 840

Grift, Bequests, and Scholarships

Last Revised 5/11/2021

In order to ensure that gifts, bequests and scholarships are not discriminatory, it is necessary that each is reviewed by the District Administrator and the Board of Education.

As a general rule, gifts, bequests and scholarships may not be awarded to students by public or private agencies, organizations or persons in any way that discriminates against students based on their sex, race, national origin, ancestry, creed, pregnancy, marital or parental status, sexual orientation, or physical, mental, emotional or learning disability. (WI Statutes §118.13)

All gifts, bequests, and scholarships made available to the Unity School District of \$5,000 or more shall be accepted at a regular Board meeting and shall be under the direct control of the Board of Education and their policies. The Board of Education authorizes the District Administrator to accept gifts, bequests and scholarships of lesser value in accordance with the other terms of this policy. The District Administrator shall provide an annual report of gifts, bequests and scholarships to the Board of Education.

The Board of Education may accept and use any bequest or gift of money or property for a purpose deemed by the Board to be consistent with District goals. Any gift presented to the District of \$5,000 or more value, should be accompanied by a letter from the donor for consideration by the Board.

To be accepted, a gift shall:

Have a purpose consistent with those of the school; Be offered by a donor acceptable to the board;

Not begin a program which the Board would be unwilling to continue when gift or grant funds are exhausted;

Not bring undesirable or hidden costs to the District;

Place no restrictions on the school program;

Not be inappropriate or harmful to the best education of students;

Not imply exclusive endorsement of any business or product, but not limit any business or community partnership; and;

Not be in conflict with any provisions of policy, school code or public law.

All gifts, grants and bequests become school property to be used at the discretion of the District unless otherwise specified in the bequest.

The Board of Education encourages any public or private agencies, organizations, or persons that give gifts, bequests, or scholarships to provide guidelines on how they shall be managed. This may include designating portions to be un-expendable, expendable or guidelines as to who are to receive gifts, bequests and/or scholarships. These guidelines may be followed at the discretion of the District.

The District may also establish a scholarship fund, trust, or foundation. Such funds shall be managed by the District Administrator, with assistance of the Finance Director.

Ref: WI Statutes § 118.13, 118.27

WI Admin Code PI 9.03(1)(d)

Discrimination Complaint Procedures

The School Board appreciates the generosity of individuals and organizations within the community that wish to donate money or other gifts to enhance the work of the public schools or to provide sponsorships in support of District programs, facilities and services. At the same time, the Board recognizes its responsibility to maintain control over the District's educational program and student activities and ensure equity in educational opportunity.

In order to maintain control over the District's educational program and student activities and to best pursue the District's mission, goals and priorities, there needs to be close communication between the potential donor/sponsor and school officials prior to the solicitation of any funds in pursuit of a school gift(s) or sponsorship and prior to the acceptance of any gift or sponsorship by the District.

No employee or agent of the District shall accept any gift or sponsorship that requires the financial commitment of District funds, that provides for the establishment of a new District program, or that involves facility naming rights without first obtaining the prior specific approval of the Board. The Board otherwise authorizes the District Administrator to accept all other monetary or other gifts to the schools, and to approve all other sponsorships, provided they are for a purpose consistent with the mission and goals of the District and are in line with this policy and the guidelines established to implement the policy. Notwithstanding this delegation of authority, the District Administrator may, at his/her discretion, elect to obtain Board approval of any particular gift or proposed sponsorship.

To be accepted, a gift must, at a minimum:

- have a purpose consistent with the mission and goals of the District;
- be compatible with curricular, technological, instructional, programmatic, and operational practices of the District, as may be applicable;
- neither impose, nor be substantially likely to impose, any undesirable or unacceptable costs (whether direct or indirect) upon the District, including but not limited to unacceptably adding to staff workloads;
- not begin a program that the donor intends to be ongoing, but where the Board has determined prior to acceptance of the gift that the District very likely would be unable or unwilling to continue the program when gift funds are exhausted;
- not prevent the Board from being able to properly discharge its duty to ultimately determine the District's educational program and the manner in which educational and other services are to be delivered;
- not require the District to publicly endorse any specific business, organization, service or product, with the understanding that recognition of a donor differs from explicit endorsement; and
- be consistent with applicable provisions of District policy and school rules and in compliance with legal requirements.

For purposes of this policy, a "sponsorship" is defined as a person, organization, business or other entity providing money, goods and/or services to support the District, a public school in the District, or a school activity or program in return for the sponsor receiving an agreed-upon public acknowledgement by the District or by a school or program indicating that the money, services and/or goods were donated by the sponsor or that the program/activity was sponsored by or sponsored in part by the sponsor.

The District shall not unlawfully discriminate in the acceptance and administration of gifts, bequests, scholarships and other aids, benefits or services to students from private agencies, organizations or persons

on the basis of sex, sexual orientation, race, color, national origin, ancestry, religion, creed, pregnancy, marital or parental status, any physical, mental, emotional or learning disability, or any other legally-protected status or classification. Discrimination complaints shall be processed in accordance with established procedures.

The District reserves the right to accept or reject any gift or sponsorship offer made to the District from any individual, organization, business or other entity. Except for any conditions or restrictions expressly accepted by the District in connection with approving and receiving a gift or sponsorship, the District's acceptance of a gift or sponsorship shall not entitle the donor or sponsor to any special privileges or considerations from the District.

The Board shall be advised of all gifts and sponsorships accepted by the District Administrator or his/her designee(s) with a value of \$5,000 or more.

Upon acceptance, all non-monetary gifts and sponsor-supplied items (furniture, supplies, equipment, etc.) shall become the property of the District and shall be subject to the same controls, policies and procedures governing other District property, except as otherwise expressly specified in the gift offer that was accepted by the District. All monetary donations shall be deposited in the appropriate designated District depository and shall be properly accounted for in accordance with applicable laws and the Wisconsin Uniform Financial Accounting Requirements (WUFAR).

It is the intention of the Board to provide proper acknowledgement (recognition) for all gifts accepted and received by the District and for all approved sponsorships. The degree of recognition should be reasonably correlated with the significance of the contribution.

It shall be the responsibility of the District Administrator to oversee District compliance with this policy, including providing proper notification to staff, school booster clubs and the general public regarding the existence of this policy and its implementing guidelines and ensuring that appropriate acknowledgement is provided to all gift donors and sponsors on behalf of the District.