

GIFT ACCEPTANCE & RECOGNITION

Purpose: Fostering community support
 Equitable practice
 Administrative ease

POLICY:

Gift Acceptance

The Library & Cultural Arts department encourages and welcomes monetary gifts that support and enhance library or cultural arts services, as well as library materials in good condition. Gifts may be from individuals, families, businesses, corporations, foundations and other organizations.

Depending upon the nature of the gift and the donor's interests, monetary donations may be directed to the library, Cultural Arts Office or one of its support organizations. Each support organization may have its own gift acceptance policy.

Gifts of library materials are accepted if they fulfill the library's collection development plan, which includes additional policies on acceptance. Materials not suitable for addition to the library's collection are offered to the Friends of the Library for resale, with the proceeds benefitting Carlsbad City Library programs and services.

Gifts of objects, furnishings and equipment, as well as in-kind contributions, may be accepted or offered to any of the support organizations if they do not fulfill the mission, vision or service goals of the department. Separate policies may apply to these gifts.

The L&CA director or another designee of the city manager has responsibility for management of gift receipt, acceptance and recognition, and for development of acceptance criteria for gifts. A gift may be declined if, in the judgment of the L&CA director, acceptance of the gift presents unacceptable restrictions or challenges, expense that significantly diminishes the value of the gift, or the perception of impropriety; or if it conflicts with the organization's mission, vision or service goals. The acceptance of a gift shall not impede the ability to acquire gifts from other sources nor subject the department or the city to adverse publicity. Certain individual gifts with a value determined by the City Council must be accepted by the City Council.

Donations that are accepted become the property of the City of Carlsbad; items purchased with donated funds will be retained so long as they continue to be relevant and useful to the purposes of the department, and can be properly stored, preserved and used. The department has the right to deaccession or loan any items purchased with donated funds.

Reporting of Gifts

The L&CA director will report gifts to the Library Board of Trustees directed for library use, and to the Arts Commission when directed for cultural arts services; and make a recommendation on gifts that are subject to City Council approval. All gifts are subject to applicable public record laws and regulations as determined by the City of Carlsbad and the State of California.

Donor Recognition

The L&CA Department values its donors, and will establish methods to appropriately acknowledge and recognize their gifts. The department will promptly acknowledge gifts with a letter of thanks unless the donor declines this, and inform donors of how their gifts will be used. Gifts accepted by the City Council will also receive a letter of thanks on behalf of the City Council. Additional opportunities exist for recognition at a City Council meeting at the donor's request. If the gift is honorific in nature, the honoree or his/her family will also receive notification of the gift and its use.

The department may establish methods by which gifts are publicly acknowledged. The purpose of public recognition is to thank donors, encourage others to give, and to build long-term relationships between the organization and its supporters. Every effort will be made to ensure recognition is timely, meaningful to the donor, appropriate and consistent. Such methods may include book plates; limited-term signage recognizing smaller or annual gifts; donor walls, plaques or other ongoing recognition; named spaces, amenities, programs or endowments; the establishment of giving circles or communities of giving; recognition events; and recognition utilizing print and digital communication methods such as newsletters, press releases, annual reports, websites, and social networking sites.

The extent of recognition shall be in proportion to the value of the contribution and its impact. The design of donor recognition methods will complement rather than conflict with delivery of services and programs, and will be consistent with principles and standards applied to the design of facilities, marketing and communication tools. The duration of donor recognition may change as facilities and communication methods are altered.

The department respects the privacy of donors and will refrain from publicly recognizing gifts if the donor requests anonymity (to the extent permitted by law).

Support organizations establish and maintain their own recognition policies. The department may collaborate with one or more of these organizations in recognizing gifts to them that directly support department facilities, programs and services. Joint recognition will be consistent with the department's policies on donor recognition. As the department establishes donor recognition programs, it

will do so in consultation with its support organizations to facilitate their success in attracting gifts.

Physical Space Recognition

Requests for naming physical space or amenities within facilities are subject to the City Council's policies on naming rights, unless otherwise determined by the City Council. The naming or designation of facilities or amenities shall never be granted in perpetuity.

Other Considerations

Because of its noncommercial, nonprofit status, the department is committed to providing programs and services that are free from influence or editorial control by an external funding source.

Purchasing decisions, including property, equipment, materials, furnishings, programs, and services, will reside with the department.

Policy approved by the Library Board of Trustees – Sept. 20, 2017

Procedure:

Gifts with a value of \$5000 or greater must be accepted by the city council.

Refer questions or concerns to a supervisor, the Person-in-Charge (PIC) or L&CA administration.

For more information on donations of materials see *Collection Development Policy*.