



Fresno County Board of Supervisors

ADMINISTRATIVE POLICY

NUMBER 30

Donations

Effective Date: October 1, 2002

Revision Date: ~~July-October 1744~~, 2017

POLICY STATEMENT

The County may accept or reject gifts or bequests made in favor of the County for a public purpose. ~~The Auditor-Controller/Treasurer-Tax Collector (A-C/T-TC) has the delegated authority to accept or reject any gift or bequest of cash, registered securities, mutual funds, and/or motor vehicles, subject to the procedures in this Administrative Policy. The Auditor-Controller/Treasurer-Tax Collector (A-C/T-TC) has the delegated authority to accept or reject any offer of a gift or bequest of a value of \$7,500 or less, subject to the procedures in this Administrative Policy.~~ Prior to accepting or rejecting any such gift or bequest made to a ~~specific~~ County department, ~~the A-C/T-TC shall first consult with the head of the specified department.~~ ~~The receiving specified~~ department head shall have the right to recommend acceptance or rejection of such gift or bequest that is contingent upon conditions that may or may not be acceptable to the department. Conditions to be considered in acceptance or rejection of a gift would include: costs of shipping, delivery, installation, maintenance, insurance and training; compatibility with existing equipment and County standards; fiscal impacts on other County departments that may result from receipt of the donation and any restrictions or requirements placed on the budget or operations of the County. In the event that the A-C/T-TC proposes to accept or reject such gift or bequest over a recommended rejection or acceptance, the department head may appeal to the Board of Supervisors. ~~In the event that the A-C/T-TC proposes to reject such gift or bequest over a recommended acceptance, the department head may appeal to the Board of Supervisors.~~

~~The A-C/T-TC has the delegated authority to accept or reject any other offer of a gift or bequest of a value of \$500.00 or less.~~ With regard to any offer of a gift or bequest of a value in excess of ~~\$500.00~~ \$7,500 that is proposed to be rejected by the A-C/T-TC, the donor(s) or representative(s) of the estate may appeal to the Board of Supervisors.

~~Offers of gifts or bequests other than those types listed above shall be submitted to the Board of Supervisors, together with the recipient department's (if any) and A-C/T-TC recommendation for acceptance or rejection of the donation.~~

To ensure there is no appearance that the donor has an advantage or preferential treatment, when the County accepts a gift or bequest in excess of \$7,500~~500~~, all matters brought before the Board of Supervisors will disclose the following information in the Board Agenda Item:

- Identify the donor and disclose if the donor is a County contractor or principal in a business, agency or organization providing contracted services with the County;
- Description of the donation(s);
- Donation(s) value;
- Purpose for which the donation(s) will be used; and
- Account to be credited (if a monetary donation).

If the County accepts a gift or bequest of any securities, including mutual funds, that are not permissible investments under the investment policies of the County, the A-C/T-TC, within a reasonable time under the circumstances, shall convert such donation to cash.

MANAGEMENT RESPONSIBILITY

The A-C/T-TC is responsible for reviewing all offers of gifts or bequests made to or in favor of the County in accordance with Board of Supervisors Administrative Policy. The department that is the recipient of any specifically designated gift or bequest that requires Board of Supervisors' acceptance is responsible for development of the related agenda item. For a general gift or bequest that requires Board of Supervisors' acceptance, the A-C/T-TC is responsible for development of the related agenda item. For any gift or bequest that requires the Board of Supervisors' acceptance, or where the gift or bequest is of a value greater than ~~in excess of \$500.00~~\$7,500, the receiving department or the A-C/T-TC, as applicable, shall give the donor(s) or representative(s) of the estate the opportunity to appear before the Board of Supervisors for public recognition. If the donor(s) or personal representative(s) wish to appear before the Board of Supervisors, the receiving department or the A-C/T-TC, as applicable, shall prepare and submit a resolution of gratitude for adoption by the Board of Supervisors and presentation to the donor(s) or representative(s). The procedures for notifying the donor(s) or personal representative(s) of the estate of the County's proposed action concerning a gift or bequest, and for appeals to the Board of Supervisors will be set forth in the Administrative Officers Management Directives.