

COLEMAN AREA LIBRARY
GIFT AND DONATIONS POLICY

I. Purpose and Scope.

The Coleman Area Library (“Library”) welcomes monetary and nonmonetary gifts that support its mission. This Gift and Donations Policy (“Policy”) establishes standards and procedures for the review, acceptance, acknowledgment, use, administration, and disposition of gifts. For purposes of this Policy, “gift” includes any donation, bequest, devise, grant, or transfer of money or property to the Library for which the donor receives no goods or services of comparable value.

II. General Acceptance Standards and Authority.

- A.** The Library may accept gifts that are consistent with its mission, long-range plans, policies, programs, and operational needs.
- B.** In determining whether to accept a gift, the Library may consider its usefulness, condition, value, space and storage requirements, installation needs, accessibility, security, insurance, maintenance, environmental concerns, legal restrictions, administrative burden, ongoing costs, and any other relevant factor.
- C.** The Library Director may accept unrestricted gifts in the ordinary course of Library operations, subject to this Policy and other applicable Library policies. The Library Board must approve any gift of real property, any restricted gift, any gift that may create a material continuing obligation or liability, and any other gift referred to it by the Library Director.
- D.** The Library may obtain legal, financial, environmental, appraisal, or other professional review before accepting a proposed gift. The donor may be required to provide information reasonably necessary for the Library to evaluate the gift.
- E.** The Library reserves the right to decline any gift.
- F.** A donor restriction is binding only if expressly accepted in writing by the Library Board. The Library may decline a gift subject to a restriction that is unlawful, impracticable, inconsistent with the Library’s mission or policies, costly or burdensome to administer, or otherwise unacceptable to the Library.
- G.** Unless the Library Board expressly accepts a written restriction, every accepted gift becomes the sole property of the Library. The Library may use, display, store, relocate, lend, sell, transfer, recycle, discard, or otherwise dispose of the gift in its discretion and consistent with applicable law.

III. Gifts of Books and Other Library Materials.

- A.** The Library may accept new or used books, audiovisual materials, and other collection materials that are in suitable condition.
- B.** Donated materials become Library property upon acceptance. The Library has sole discretion to determine whether an item will be added to the collection in accordance with the Library’s applicable collection development or materials selection policy.

C. Materials not added to the collection may be sold, transferred, recycled, discarded, or otherwise disposed of according to Library needs. Donation does not guarantee that an item will be added to or retained in the collection.

D. Upon request, the Library may provide a receipt describing the type and quantity of materials received. The receipt will not state or verify the materials' value.

IV. Monetary Gifts and Bequests.

A. The Library welcomes cash gifts, bequests, devises, and other monetary gifts for Library materials, programs, services, facilities, staff training and professional development, and other lawful Library purposes.

B. Unrestricted monetary gifts may be used where the Library determines the need is greatest.

C. The Library may decline a monetary gift that does not meet its needs or that is subject to a restriction the Library cannot reasonably accommodate.

D. Gifts of \$1,000 or more may be accepted or administered under the Library's Endowment Fund Policy when appropriate. The Library Director shall determine the applicable process and refer any question concerning an endowment or restricted fund to the Library Board.

V. Equipment, Furniture, and Other Personal Property.

A. Equipment and furniture, including computers, office equipment, lamps, desks, and chairs, are not generally accepted and should not be left at the Library without prior approval.

B. The Library Director may accept an item that is suitable for Library use after considering its condition, compatibility, safety, accessibility, installation requirements, maintenance, storage, and anticipated costs.

C. The Library may accept other personal property on a case-by-case basis in accordance with the general standards in this Policy.

VI. Real Property and Objects of Art.

A. The Library Board must approve the acceptance of real property and objects of art, including paintings, sculpture, statuary, decorative furnishings, and similar items.

B. Before accepting real property, the Library may require satisfactory review of title, surveys, environmental conditions, zoning, taxes, assessments, insurance, restrictions, marketability, carrying costs, and other actual or potential liabilities. The Library may require the donor to pay the costs of that review.

C. Acceptance of an object of art does not guarantee permanent exhibition, a particular display location, or continued retention.

VII. Valuation and Tax Matters.

- A.** The Library will not appraise or assign a value to any gift and will not provide tax, legal, or financial advice.
- B.** The donor is solely responsible for determining the value of a gift, obtaining any required appraisal, and consulting the donor's own tax, legal, or financial advisors.
- C.** Any acknowledgment or receipt issued by the Library will describe the gift but will not state, verify, or endorse its fair-market value.

VIII. Acknowledgment, Recognition, and Donor Privacy.

- A.** The Library may acknowledge or recognize a gift in a manner it determines appropriate. Public recognition, permanent recognition, naming rights, plaques, and displays are not guaranteed and require prior written approval by the Library Board when they create an ongoing commitment.
- B.** The Library will make reasonable efforts to honor a donor's written request for anonymity, subject to applicable law.
- C.** Acceptance of a gift does not constitute or imply the Library's endorsement of the donor, the donor's activities, or any product, service, belief, or viewpoint.

IX. Gift Agreements and Administration.

- A.** The Library may require a written gift agreement for a restricted, significant, complex, or unusual gift or for any gift likely to create a continuing obligation. The agreement may address the gift's purpose, restrictions, recognition, administrative costs, disposition, and the Library's authority if the stated purpose becomes unlawful, impossible, impracticable, or inconsistent with Library needs.
- B.** Only the Library Board or a person expressly authorized by the Library Board may execute a gift agreement or accept a restriction on behalf of the Library.
- C.** The Library Director may develop forms and administrative procedures consistent with this Policy and shall refer unusual or uncertain proposed gifts to the Library Board.
- D.** If a provision of this Policy conflicts with applicable law, the law controls, and the remaining provisions continue in effect.