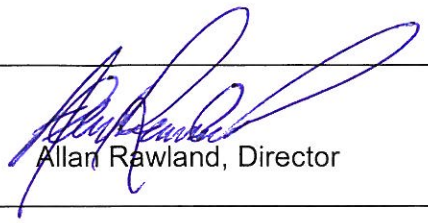
County of San Bernardino
Department of Behavioral Health

Gifts and Donations Procedure

Effective Date 01/13/10
Approval Date 01/13/10



Allan Rawland, Director

Purpose

To establish the responsibilities of procedures for reviewing, accepting and acknowledging gifts and donations offered to the Department of Behavioral Health (DBH).

Review of Gifts and/or Donations

DBH is responsible for reviewing gifts in which the Department would have proprietary control if accepted. The following includes the necessary steps when reviewing and determining whether to accept gifts and/or donations:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Determine value
<table>
<tr><th>If…</th><th>Then…</th></tr>
<tr><td>it is determined the gift/donation is of value to DBH</td><td>DBH will proceed with steps to review the acceptance of the gift/donation.</td></tr>
<tr><td>it is determined the gift/donation is not of value to DBH</td><td>DBH shall issue a letter to the donor respectfully declining the offer.</td></tr>
<tr><td>It is determined the gift/donation may be of value to a different County department</td><td>DBH may refer the gift/donation offer to the other County department unless restrictions exist that prohibit the transfer of the gift.</td></tr>
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Gifts and Donations Procedure, Continued

2	Determine impact

If...	Then...
there is a one time cost associated to the acceptance of the gift/donation and department funds are available	DBH may accept the gift with the approval of the Assistant County Administrative Officer (ACAO).
there is a one time cost associated to the acceptance of the gift/donation and department funds are *not* available	the gift may be accepted upon the recommendation of the ACAO for the appropriation of funds by the Board of Supervisors.
there is a future, continuing or ongoing cost associated to the acceptance of the gift/donation and DBH recommends the acceptance of the gift/donation	the approval of the Board of Supervisors is required.
there is a future, continuing or ongoing cost associated to the acceptance of the gift/donation and DBH does *not* recommend the acceptance of the gift/donation	DBH shall issue a letter to the donor respectfully declining the offer.
restrictions imposed by the donor as to the use or future disposition of the gift/donation are compatible with Department and County policies	DBH may accept the gift/donation.
restrictions imposed by the donor as to the use or future disposition of the gift/donation are *not* compatible with Department and County policies	DBH shall issue a letter to the donor respectfully declining the offer.
DBH determines it can obtain ownership and/or title status	DBH may accept the gift/donation.
DBH questions the ability to convey ownership	DBH shall confer with County Counsel before taking further action.

Note: Gifts and/or donations of real property must be coordinated through the County's Real Estate Services Department for analysis to determine whether DBH can accept the gift/donation.

Gifts and Donations Procedure, Continued

Acceptance of Gifts and/or Donations

The following occurs when it is determined that DBH shall accept a gift and/or donation:

Gift/Donation	Responsible Party for Acceptance
Valued under ten thousand dollars ($10,000)	Director or designee
Valued equal to or over ten thousand dollars ($10,000)	Director or designee **Important Note**: DBH is responsible for obtaining Board of Supervisor approval.
Time-sensitive regardless of the value	Board of Supervisors **Important Note**: When it is determined that receipt of a gift/donation is of a time-sensitive matter and the Board is not available for approval, DBH shall request the County Administrative Officer accept via an internal memorandum including the minimum information: • Donor • Description of gift/donation • Use restrictions, if any • Estimated cash value • Date received
Land or Real Property	County Real Estate Services
Personal Property	Director or designee Important Note: DBH is required to receive a letter from the donor noting the transference of ownership to DBH. The letter shall include any restrictions on the offer to which DBH has agreed. The Director or designee shall prepare and complete form 12-7973-123, "Notice of Acquisition-Change-Disposition" to the Auditor-Controller/Recorder for record inventory purposes and maintain a copy for Department records.

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Gifts and Donations Procedure, Continued

Notice to the Clerk of Board	The DBH Public Information Officer (PIO) shall quarterly report gifts/donations to the Board of Supervisors via the Clerk of the Board for the following gifts/donations: • Value equal to or in excess of ten thousand dollars ($10,000) • Time-sensitive gifts accepted by the CAO in which Board of Supervisor approval was not available
Acknowledge-ment of Gifts and/or Donations	The following is required once DBH accepts a gift and/or donation: • The DBH PIO shall issue a detailed letter acknowledging and thanking the donor for the gift, as the donor may need for tax purposes. • DBH shall provide a copy of the acknowledgment including pertinent information to the Board of Supervisors within thirty (30) days of acceptance of a gift/donation. • When DBH has determined that acceptance of a gift shall be acknowledged by the Board of Supervisors, the DBH PIO shall forward a copy of the letter to the Clerk of the Board when submitting as a Board Agenda Item.
Reference	California Government Code, Section 25355
Related Policies and/or Procedures	County of San Bernardino Policy 11-08, Gifts and Donations Granted to the County County of San Bernardino Standard Practice 11-08SP, Reviewing Gifts Prior to Acceptance by the County DBH Standard Practice Manual BOP3029: Acceptance of Gifts and Donations Policy