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**SUBJECT: DONATION POLICY****I. PURPOSE**

The Naperville Public Library welcomes both cash and in-kind donations. The purpose of this policy is to provide guidance to citizens making donations to the Library.

**II. SCOPE**

The Naperville Public Library may receive donations, bequests, endowments, memorials, planned giving and trusts. Restricted donations are those to which the donor has defined specific terms, conditions and purposes. Unrestricted donations are those to which the donor has not specified terms, conditions or purposes.

**III. DEFINITIONS**

- A. Bequest: A donation of assets made at death by an individual through a will or trust.
- B. Donation: A voluntary transfer of property or money without the expectation that any benefit will accrue to the donor or anyone designated by the donor.
- C. Donor: An individual, organization, foundation or business that makes a monetary or in-kind contribution to the Library.
- D. Endowment: A donation providing for the continuing support, maintenance or operation of the Library.
- E. Fund: Used variously to denote the vehicle for securing contributions; the goal of a capital campaign; goals of a special program or project; or a philanthropic foundation.
- F. Fundraising: The process of securing additional income through donations to support Library services and/or programs.
- G. Memorial: A donation made to perpetuate the memory of an individual. "Memorial" is not to be confused with a donation to honor a living person.
- H. Planned Giving: A substantial donation, possibly in the form of a bequest, life insurance and/or charitable annuity, which is often planned as a donation upon the death of the donor.

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- I. Trust: A legal arrangement between a donor and a trustee, which gives management of specified wealth to the trustee to direct income for the benefit of the Library.

**IV. PROVISIONS**

- A. Overall, donation practices must be ethical and sound and further the Library's vision, goals, objectives and priorities. The Naperville Public Library will only enter into development relationships determined to be in the best interest of the Library.
- B. All development activities conducted on behalf of the Naperville Public Library and its collections, services or programs, and the solicitation of funds from various entities, is under the supervision and approval of the Executive Director. The Executive Director may request the assistance and consultation of the Board of Trustees or qualified staff in order to effectively plan development activities.
- C. The Naperville Public Library Board of Trustees reserves the right to accept or reject any donation, endowment, bequest or trust.
- D. The Naperville Public Library welcomes direct monetary donations. These funds may be used for Library materials, Library furniture, equipment or property, or to sponsor Library programs.
- E. Direct Monetary Donations – Unrestricted
  - 1. The Library will encourage the public to make unrestricted donations.
  - 2. If donated funds are unrestricted, they may be expended by authorization of the Naperville Public Library Executive Director within the scope of its statutory authority.
  - 3. Unrestricted monetary donations may be accepted for Library materials and the donor may recommend a subject area or format. The Library will attempt to honor the donor's wishes if the recommendations are consistent with the Materials Selection Policy 260 and fit available space. Selections purchased from these funds will be made by the staff. A gift plate will acknowledge the donation if requested by the donor. Contributions toward subscriptions must be made with funds to cover a two-year commitment.
  - 4. Unrestricted monetary donations received for Library furniture or equipment will be acknowledged in writing to the donor.

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**SUBJECT: DONATION POLICY****F. Direct Monetary Donations – Restricted**

1. If donated restricted funds are accepted, they must be expended according to the Donor's conditions.

**G. The donor will determine whether a donation is being given to the Library or the Naperville Public Library Foundation.****H. Donation of Library Materials**

1. All materials donated will be evaluated for acceptance by staff. Donations must be outright and unconditional.
2. The staff will determine which materials to add to the collection. Those items not added may be offered for sale, utilized for promotional purposes, or transferred to other institutions. Unsuitable items will be discarded or recycled.

**I. In-Kind Donations**

1. The Library may accept other in-kind donations such as merchandise coupons or complimentary admissions in support of Library programs. In-kind donations will be acknowledged in the Library's promotional materials.
2. The Library may accept donations of art when the following conditions are met:
  - a. If a donation is proposed during design or construction of a new building, the Library will consult with the architect and the professional interior designer working on the building to determine whether the gift is appropriate to the facility and whether the Library will accept the donation.
  - b. If a donation is proposed after a facility has opened, the proposal will be reviewed by a committee consisting of one Library Board member, two Library staff members, two individuals with expertise in the visual arts or architecture, and the Library Manager of the building in which the piece is proposed to be displayed. The committee will be convened as needed and will be selected by the Executive Director on an ad hoc basis. Its ruling on the Library's acceptance of any piece shall be final.
  - c. Donations of art must be unconditional, transferring ownership and all the rights of ownership to the Library. Donations are accepted only with the understanding that the Library has the right to determine retention, location, and other considerations relating to the use or disposition of the gifts. The Library may sell the item for value and use the proceeds for any purpose appropriate to the Library's vision. The Library may transfer ownership to any other agency it deems appropriate.

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- J. All publications, conversations, practices and agreements regarding donations shall be truthful, fair, and kept confidential to the degree agreed upon.
- K. Trustees, employees and/or volunteers may not make any promise to a donor, nor expect any favoritism from a donor, nor agree to any donor-directed changes in the vision, policies, services, collections or programs of the Library as a result of a solicitation or contribution.
- L. All donations to the Library, including cash, pledges (unconditional promise to give) securities, trusts, insurance policies, real estate, and other in-kind donations, shall be officially recorded and acknowledged. It is the responsibility of the Executive Director to appoint appropriate staff to maintain these records.
- M. All contributors have the right to obtain complete and timely information on how their donation was/will be used.
- N. Developed relationships or agreements must maintain the Library's principle of intellectual freedom, safeguard the Library's equity of access, support the Library's policies against discrimination and assure user confidentiality.
- O. The Library will adhere to all local, state and federal statutes or mandates relating to municipal entities, charitable organizations and not-for-profit corporations.
- P. The Library will follow generally accepted accounting principles (GAAP) relating to the accounting and crediting of all contributions.
- Q. The Library reserves the right to terminate an existing agreement should conditions arise during the life of the agreement which would result in it conflicting with the best interest of the Library.
- R. Capital campaigns will be conducted to raise large sums of money to fund capital building or renovation projects under the direction of the Executive Director and approval of the Board of Trustees.
- S. Donors are to be provided with honest and accurate information about the Library's mission, services, programs and status.
- T. While it is important that the Executive Director and Trustees remain aware of any tax provision relating to contributions, the Library will not represent itself as representing

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the donor in any transaction and will stipulate that the donor contact a professional advisor in questions of gift valuation and deductibility.

- U. Any solicitation from a Library vendor must not be directly related to the business relationship with the vendor or the vendor's competition. Nor should any vendor be chosen based on a stated or implied contribution to the Library.
- V. All sponsored or donated products, materials and services must meet the standards used by the Library in the purchase of similar materials.
- W. No employee will be required to wear or personally display any items with a corporate logo or advertising, other than that of the Naperville Public Library.
- X. Donor, sponsor and partner names are public information unless the donor requests anonymity.
- Y. The prospect and donor files (including computer databases) are the property of the Library. A Trustee, employee or volunteer may not use or hold any unpublished files for any use other than the advancement of the Library.
- Z. Upon receipt of any donation, the Library may acknowledge it promptly.
  - 1. Acknowledgement of a donation may take any or none of the following forms at the discretion of the Library and/or the donor.
    - a. A special program or media campaign to announce the donation.
    - b. Library bookplate(s) with the donor's name.
    - c. A small, standardized plaque placed on or near a physical object or feature in a Library building.
    - d. Acknowledgement in a Library promotional publication, display, advertisement, Web page or banner.
    - e. Announcement at a Library program.