



<b>MANUAL: Governance – Financial Control and Oversight</b>	<b>NUMBER: Finance-6</b>
<b>POLICY: DONATIONS AND GIFTS</b>	
<b>APPROVED BY:</b> Port Hope Public Library Board	<b>DATE APPROVED: September 22, 2004*</b>  <b>DATE REVISED: April 21, 2010; May 20, 2020</b>  <b>NEXT REVIEW: Every two years or as required</b>
<b>REFERENCE:</b> <i>*Formerly Board By-Law Board-27</i>	

**General Statement**

The Port Hope Public Library greatly benefits from gifts and donations received from generous supporters each year. These welcome contributions will be used for library materials, programming, equipment as a means of developing and expanding the library’s collections, or as otherwise requested by the donor.

**Donations and Gifts Categories**

**Materials in General** – Gifts of library materials will be accepted and added to the collection only if they are needed and meet the criteria of the Collection Development Policy. Items not added to the collection will be sold, given to other libraries, or discarded.

**Collections** – Gift collections will be accepted only by the Chief Librarian, with the counsel of the Library Board as appropriate, and with the understanding that the collection may not be kept intact.

**Recognition Gifts** – The library welcomes monetary gifts for purchase of library materials given in recognition of individuals or organizations. The names of the donor(s) and the individuals or organizations recognized by the gift will be listed on a bookplate and affixed to the material.

**Other Monetary Gifts** – The library welcomes gifts of cash for the direct purchase of library materials and will try to accommodate the subject or title preferences of the donor (in accordance with the Collection Development Policy). A book plate recognizing the donor will be affixed to the material if desired. Substantial cash offerings, securities, and bequests will be handled by the CEO who, with the Library Board, will work out terms of acceptance that are compatible with library policies, the donor’s intent, and applicable laws.

**Real Estate or Other Personal Property** – The library will accept gifts of real property that support the mission of the library. Such offers will be handled by the Chief Librarian, who, with the Library Board, will determine the suitability of the gift and work out terms of acceptance that are compatible with library policies, the donor’s intent, and applicable laws.

**Return of Items** – Once a gift is accepted by the library it becomes the property of the Port Hope Public Library and will not be returned.

**Tax Receipts** – Tax receipts will be issued in accordance with current Canada Revenue Agency guidelines.

## **PROCEDURES: DONATIONS AND GIFTS POLICY**

1. Donations of library materials accepted for inclusion in the collection must meet current collection development needs and policies, and will be added at the discretion of the Library.
2. Items not added to the Library’s collection will be offered for sale or recycled depending on the nature and condition of the items.
3. See Appendix I for the Port Hope Public Library’s Statement for Donated Materials.
4. Gift collections – significant book collections offered as donations – require the approval of the CEO subject to the following criteria:
  - donated items fall within the mandate of the Library and the Library’s Collection Development Policy
  - donated items do not duplicate material already in the collection unless suitable as replacement copies
  - physical condition of the materials is acceptable and appropriate for a public library
  - donated items become the property of the Library; no restrictions can be required by the donor on the disposition and use of the material offered
5. Charitable tax receipts are only issued for books and/or collections of books of high and significant value that are added to the Library collection. The decision to issue tax receipts for the books and/or collection will be determined by the agreement of fair market value at the time of the donation. This may take the form of a discussion or evaluation by an experienced and knowledgeable staff/board member or submission of an appraisal. If there is no agreement regarding relative value then no receipt will be issued by the Library. Decisions will be made in accordance with Canada Revenue Agency legislation and guidelines. Gifts of books or other library materials valued at over \$1,000 require an independent appraisal at the expense of the donor.
6. Similar stipulations as in Item #4 apply to other gifts of personal property.
7. Charitable tax receipts are issued for cash donations over \$25.
8. Gifts of books and/or other library materials or personal property are accepted only on the understanding that the unconditional ownership of the gifts is retained by the Port Hope Public Library to use as the Library deems appropriate.
9. All donors of books, other library materials or personal property must sign the Donations and Gifts Policy Release Form (Appendix II).

10. Donors of cash gifts should be encouraged to fill out the Port Hope Public Library's Donation Form (*Appendix III*). Donors may direct their donations as well as make specific requests that the Library will attempt to honour as dictated by availability/suitability of requested materials, and current collection needs. Donors may also receive recognition through a bookplate placed in the material.



**PORT HOPE  
PUBLIC LIBRARY**

<b>MANUAL: Governance – Financial Control and Oversight</b>	<b>NUMBER: Finance-6 Appendix I</b>
<b>POLICY: DONATIONS AND GIFTS Appendix I: Port Hope Public Library’s Statement for Donated Materials</b>	
<b>APPROVED BY: Port Hope Public Library Board</b>	<b>DATE APPROVED: September 22, 2004*</b>  <b>DATE REVISED: April 21, 2010; May 20, 2020</b>  <b>NEXT REVIEW: Every two years or as required</b>
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**Appendix I: Port Hope Public Library’s Statement for Donated Materials**

The Port Hope Public Library welcomes donations of materials, however, the Library would like donors to be aware that not all materials are appropriate for the Library collection. We will gladly accept donations on the understanding that the materials may be added to the collection or they may be sold or recycled.

As general guidelines, the Port Hope Public Library accepts the following:

- Hardcover fiction and nonfiction materials published within the last five years.
- Gently used paperbacks and picture books in excellent condition
- Audio-visual materials in excellent condition
- Any material on the history of Port Hope and Hope Township

As general guidelines, the Port Hope Public Library does not accept the following:

- Reader’s Digest materials
- Old textbooks
- Encyclopedias
- National Geographic magazines

Disposing of unusable materials constitutes a cost that the Library must absorb. The Port Hope Public Library wants all donors to be aware of the policy before they consider making a donation.



**PORT HOPE  
PUBLIC LIBRARY**

<b>MANUAL: Governance – Financial Control and Oversight</b>	<b>NUMBER: Finance-6 Appendix II</b>
<b>POLICY: DONATIONS AND GIFTS Appendix II: Donations and Gifts Policy Release Form</b>	
<b>APPROVED BY: Port Hope Public Library Board</b>	<b>DATE APPROVED: September 22, 2004*</b>  <b>DATE REVISED: April 21, 2010; May 20, 2020</b>  <b>NEXT REVIEW: Every two years or as required</b>
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***Appendix II: Donations and Gifts Policy Release Form***

Date \_\_\_\_\_  
Name \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_  
Postal Code \_\_\_\_\_  
Telephone \_\_\_\_\_  
E-mail \_\_\_\_\_

Number of items \_\_\_\_\_

Description of items (attach additional pages as necessary)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Charitable Tax Receipt Requested     Yes     No

The individual (s) named above has donated books and/or other library materials or personal property as described to the Port Hope Public Library. The donation is in accordance with the Donations and Gift Policy and Procedures of the Port Hope Public Library, and by signing, the donor indicates agreement and acceptance.

Signature of Donor \_\_\_\_\_  
Date \_\_\_\_\_

Signature of Chief Librarian \_\_\_\_\_  
Date \_\_\_\_\_

*The original of this form goes to the Donor with a duplicate retained by the library.*



<b>MANUAL: Governance – Financial Control and Oversight</b>	<b>NUMBER: Finance-6 Appendix III</b>
<b>POLICY: DONATIONS AND GIFTS Appendix III: Cash Donation Form</b>	
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**Appendix III: Cash Donation Form**

Donation Form

Name \_\_\_\_\_

Address \_\_\_\_\_

Postal code \_\_\_\_\_ Phone \_\_\_\_\_

Email \_\_\_\_\_

Donation acknowledgement in Library Book  Yes please  No thank you

I would like my donation published as:

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Amount \$ \_\_\_\_\_

- Cash                       Debit  
 Cheque (payable to Port Hope Public Library)

Amounts over \$25.00 will have tax receipts issued.

I wish my donation to be directed to:

- Mary J. Benson Branch       Children’s material                       Technological Development  
 The Hub at Canton               Young adult material                      (Computers, laptops, printers)  
 Adult material                       Talking books  
 DVDs                                       Large print  
 Library programming \_\_\_\_\_

Specifically (eg. picture books, adult science fiction, etc.)

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I would like the option of being the first person to borrow this material

Yes please  No thank you

*Thank you very much for your donation.*