

Donations Acceptance Considerations

From time to time, individuals may desire to contribute items (meaning to donate without any reimbursement) to Heritage Grand. The following considerations will be made before any donations are accepted.

General Overview:

This guideline speaks of physical or financial donations only; donations of time are always welcomed.

Board approval is required to accept any donation; however the Board is assisted in its decisions as specified in the following Procedures.

The objective of this process is to confirm an Association *benefit* before a donation is accepted.

Why do we need a process? Past experience is that sometimes donations are beneficial to the Association (donations to our library, for instance) but other times the motivation might instead more seem to approach "I'm moving; it is *easier for me* to donate this white elephant to the club than to otherwise dispose of it." In this second case, the Association may also consider the "donation" of little value and then has to go to the effort and expense of disposal.

Committees are asked to give advice concerning the potential donation's usefulness so as to confirm that the item(s) complies with committee's plans and designs.

Items requiring ongoing upkeep (for instance, plants or fish) may not be accepted due to the correct recognition of support costs (for instance, irrigation equipment and ongoing utility costs for plants).

Donations, if accepted, will become the property of the Association and will be utilized as the Association sees fit.

Requested signage or other honorariums (for instance, "in honor of" placards) will, in most cases, be denied. Although many owners are deserving of such recognition, administering the break-point of "deserving" versus "not quite deserving" would generate discord in the Association.

Cash donations may be made to the Association's Operating Fund (via delivery to the Board President). Recognition, if desired, will be made at a convenient open Board meeting. Due to our purchased accounting processes, cash funds shall not be directed or tied to any specific activity or program, and carryover from year to year is also unavailable.

Procedures

The Association's property manager is the homeowner's contact person for all donations.

The Board's decision concerning acceptance or non-acceptance is on a case-by-case basis and with no "precedent" consideration.

Depending on the specific donation item, the following general practices should occur. (As can be seen, these processes are based on the physical size and ease of disposal.)

For small hand carried items (think books, games, jigsaw puzzles). These donations may be brought to the clubhouse desk and, if agreeable with staff, may be left there.

For intermediate-sized items but that are still easily carried (think decorations), discuss with staff beforehand to get an okay to bring to the desk.

The Board authorizes our property manager the decision-making authority for acceptance or rejection of these hand-carried offerings.

For larger sized physical donations (something that might best be moved by dolly), a discussion before arriving with the item is necessary.

- This discussion should be held allowing a minimum of 2 weeks notice before the desired drop-off timing so staff can obtain Operations Committee concurrence (for clubhouse use potential) and Board approval.

- Any “live items” like landscape materials (i.e., Plants, Trees, Bushes) and fish also require a minimum 2 weeks notice so staff can obtain Maintenance Committee concurrence and Board approval.

In addition, the following categories of potential donations – Furniture, Supplies, Expendables, Dishes and Cooking Utensils – regardless of size, will also follow the “larger size” process.

This guideline was ratified by majority Board vote on 2/12/24.

Jim Ireland

Board Secretary