



**PEORIA TRIBE**  
OF INDIANS OF OKLAHOMA

## **PEORIA TRIBE DONATION POLICY**

THIS PEORIA TRIBE DONATION POLICY WAS ADOPTED ON FEBRUARY 6, 2024 BY TRIBAL BUSINESS COMMITTEE.

# PEORIA TRIBE DONATION POLICY

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## 1. PURPOSE

- a. The Peoria Tribe of Indians of Oklahoma, herein known as PTIO, frequently receives requests to make donations, and/or support via sponsorships.
- b. This Policy establishes the policy and procedures for evaluating requests, processing, and making donations and/or sponsorships.
- c. This Policy is not intended to address and does not address requests for Donations:
  - i. To any subordinate entity of the PTIO that has been delegated the necessary authority to make donations:
  - ii. To any department of the PTIO pursuant to a program of such department:
  - iii. To any political campaign, political candidate, political cause, or political event; or
  - iv. To any legislative or legal cause.
- d. This Policy shall be interpreted in a manner consistent with the above purposes.

## 2. DEFINITIONS

- a. “Applicant” means the person requesting the PTIO donation.
- b. “Citizen” means a duly enrolled member of the PTIO.
- c. “Donation” means a gift of a financial or physical contribution by the PTIO.
- d. “Donation Budget” means a budget for all donations that may be approved by the Tribal Business Committee pursuant to the Policy. The donation budget does not have to be a stand-alone item of the Tribe’s overall budget but may instead be a portion of the Tribe’s overall budget adopted for all donations.
- e. “Donation Request Form” means the form approved by the Tribal Business Committee, pursuant to this Policy that an Applicant must complete to request the PTIO donate.
- f. “Entity” means any business, association, partnership, corporation, firm, joint venture, trust or other form of business association or business entity, tribal state, local government, or government instrumentality.
- g. “PTIO” means Peoria Tribe of Indians of Oklahoma.
- h. “Policy” means this PTIO Business Committee donation policy.
- i. “Tribal Business Committee” means the legislative body of the PTIO as set forth in ARTICLE VIII, Section 2 of the PTIO Constitution.
- j. “Designee” means the designated person within PTIO that receives applications and follows the outlined process.

## 3. DONATION BUDGET

The Tribal Business Committee shall approve a donation budget annually.

## 4. PROHIBITED DONATIONS

The Tribal Business Committee shall not consider or approve a donation for any of the following:

- a. A donation to an individual.
- b. A donation that exceeds the total donation budget.
- c. Any organizations that have received a donation from any PTIO subsidiaries or enterprise within the same calendar year.
- d. A donation that spans multiple years.

## 5. REQUESTING A DONATION

- a. Requests for a donation may be made by any person or entity.
- b. All requests for donations shall be made on a Donation Request Form provided by the designee, which shall include but not be limited to the following information:
  - i. Name and contact information of the applicant.
  - ii. Whether the applicant is a PTIO citizen.
  - iii. Name and description of the entity to which the donation is to be made including all contact information.
  - iv. Amount of the donation desired.
  - v. Purpose for which the donation will be used.
  - vi. If the donation is for a specific activity or event, a description of the activity or event and if known, the budget for the activity or event.
  - vii. Date by which the donation is desired.
  - viii. Whether the applicant has sought a donation for the entity from any subordinate or enterprise entity of the PTIO and when.
  - ix. W9 information for the entity to which the donation is to be made.
  - x. Any publicity or recognition that the PTIO may receive if the donation is approved.
- c. All completed donation requests forms shall be returned to the designee to check validity and policy requirements before being submitted to the Executive Assistant to the Chief to be added to Business Committee packets for discussion at the next regular meeting.

## 6. DONATION AMOUNT

- a. Donations in the amount of \$250 or less may be made at the discretion of the Chief/Tribal Administrator following the policy of once per calendar year.
- b. Any donation requests exceeding \$250 must be discussed and approved by the Tribal Business Committee.

## 7. PROCESSING DONATION REQUEST FORMS

- a. The designated person shall review all completed Donation Request Forms for compliance with this Policy. The designee shall determine whether the completed Donation Request Form fulfills the requirements of this Policy and is eligible for a donation review pursuant to this Policy.
- b. If the completed Donation Request Form does not fulfill the requirements of this Policy and is not eligible for a donation pursuant to this Policy, the designee shall inform the applicant, including all reasons for such. Any such determination shall be final and not subject to appeal.
- c. Upon a determination that the completed Donation Request Form does fulfill the requirements of this Policy and is eligible for consideration by the Tribal Business Committee pursuant to this Policy, the designee shall submit all related information to the Executive Assistant to the Chief to be disseminated at the next regular scheduled Business Committee meeting for discussion.

## 8. DECISION

- a. Any donation made by the PTIO pursuant to a Donation Request Form must be approved by Tribal Business Committee by a motion. With the exception of the Chief/Tribal Administrator discretionary amount designated in the "DONATION AMOUNT" section of this Policy.

- b. The Tribal Business Committee may consider the following when deciding whether to approve a donation:
  - i. The extent to which the PTIO or its entities will benefit, including through supporting the PTIO mission and strategic initiatives, positive viability, or community goodwill.
  - ii. The extent to which PTIO Citizens will benefit.
  - iii. The extent to which the donation is for any priority that may be adopted or recognized by the Tribal Business Committee.
  - iv. Whether to approve an amount less than that requested in the Donation Request Form.
  - v. The amount remaining in the donation budget
- c. Any decision to approve (in whole or in part), reject or not consider any donation pursuant to a Donation Request Form shall be in the Tribal Business Committee's sole discretion. Any such decision shall be final and not subject to appeal.
- d. The Executive Assistant to the Chief shall instruct the designee to inform the applicant in writing, whether formal or electronically, whether the donation was approved or rejected. There shall be specified language utilized in the notice of rejection, i.e., "this request does not currently meet the priorities of the PTIO."
- e. If the Tribal Business Committee approves a donation, the Executive Assistant to the Chief will inform the designee to submit a requisition to the Accounting Department in the amount approved by the Tribal Business Committee.

## 9. PAYING APPROVED DONATIONS

All donations approved by the Tribal Business Committee shall be paid directly to the requesting entity identified in the Donation Request Form. Before issuing payment to the said entity, the Accounting Department shall obtain from the entity a completed IRS W9 Form (Request for Taxpayer Identification Number and Certification).

## 10. MISCELLANEOUS

- a. The designee must keep a pristine record of all requests and decisions and shall quarterly provide the Tribal Business Committee with a report that, at a minimum, contains the number and amount of each donation approved pursuant to this Policy during the calendar year and remaining donation budget balance.
- b. The Communications Department staff shall ensure that a copy of this Policy and the Donation Request Form are provided on the PTIO website and are otherwise available upon request.
- c. Nothing contained in this Policy shall be construed to vest in any person, applicant, or entity any right or interest in any PTIO revenues or assets.
- d. The PTIO Business Committee reserves the right to amend or repeal this Policy at any time in its sole discretion, subject to applicable PTIO law.