

CAMPAIGN DONOR RECOGNITION

Guidelines

The overall objectives of a Campaign Donor Recognition plan are to:

- Honor leadership donors at the \$100,000 and above gift levels with emphasis on donors at the \$1 million and above gift levels.
- Express gratitude to all donors regardless of gift levels
- Encourage donors to continue their ongoing support and involvement with the organization.

The following are recommendations and guidelines for a Campaign Recognition Committee.

Campaign Donor Recognition Committee

The Campaign Steering Committee appoints a Chair to head a Committee to be comprised of 4 to 6 Trustees and non-Trustees to guide and direct formal recognition of donors to the campaign. This Committee's principal areas of responsibility will be to:

- Review current policies and procedures related to donor recognition, and make any suggested additions and/or modifications judged necessary.
- Oversee the application of approved donor recognition policies as well as make any necessary *exceptions to policy* during the course of the campaign as judged to be in the best interests of the organization and donors involved.
- Oversee the preparation and placement of donor plaques and honor rolls as well as receptions, mementoes and the like designed to honor donors to the campaign.

Major Facilities and Features for "Naming"

Based on an examination of projected construction costs of the new buildings and facilities a recommended list of *Major Donor "Naming" Opportunities* will be developed

“Right of First Acceptance”

During early personal contacts and conversations with potential “lead” donors, and prior to formal Board approval of donor “naming” recognition opportunities, early donors/donor families can be assured of their “right of first acceptance” of Board approved “naming” opportunities based on the date and level of their gift commitment.

Recognizing Prior “Named” Donors

A thoughtful approach should be taken with prior donors and donor families whose current “named” recognition associated with the campus’s major feature and facilities may be eliminated as a result of new construction and renovation.

Defining Permanent Recognition

A “named” major facility or feature will remain “named” in honor of a donor/donor family until such time as the facility or feature requires replacement and/or major renovation, at which time the donor/donor family will be asked to consider a renewed “naming” gift **or** accept permanent acknowledgement of their earlier and generous support through the prominent placement of an appropriate plaque on the campus.

It should be made clear to donors that a “naming” gift commitment provides the organization the opportunity to “name” a major facility or feature on the campus to honor the donor/donor family and **does not represent** the restriction of the gift commitment to fund that “named” major facility or feature.

Featured “Naming” Opportunities

During the initial stages of the campaign, when gift commitments are being sought at the highest dollar levels, only “naming” opportunities at the highest specified gift levels will be featured. As the campaign progresses, donor recognition opportunities at increasingly lower dollar level may be offered for donors’ considerations.

Although there may be “naming” opportunities available throughout the campus in areas not associated with the campaign’s featured funding objectives, these opportunities will not be featured during the campaign, but may be made available to donors on a selective basis at the discretion of the Campaign Donor Recognition Committee.

Number and Levels of “Naming” Opportunities

A sufficient number of “naming” opportunities should be identified at the appropriate gift dollar levels to coincide with a projected “gift model” for the campaign.

Policies Regarding “Naming”

The following general guidelines would be applied to terms and conditions for “naming” a major facility or feature on the campus:

- **Cash-In-Hand:** The formal and official “naming” of a major facility or feature will be made when sufficient cash has been received from the donor/donor family toward their total pledged commitment to cover the actual costs of construction, renovation or purchase.
- **Pledge Periods:** Gifts pledged with payments of up to 5 (five) years will be acceptable.

Additional Consideration

In accepting “naming” gifts, the organization must be clear with the donor, and donors must be willing to accept, reasonable expectations of timing and/or other specific considerations under which the major facility or feature will be constructed or renovated.

Estate Planned Gifts

In establishing gift levels for the purposes of donor recognition, the value of an irrevocable planned gift will be determined based on the following definitions:

- **Charitable Remainder and Lead Trust:** valuation of the organization’s charitable interest upon trust formation.
- **Pooled Income Fund Gift and Gift Annuity:** valuation of the organization’s share of charitable interest calculated at the time of the gift.
- **IRA (Individual Retirement Account) Designation:** specified dollar amount or currently estimated residual dollar amount to pass to the organization as designated beneficiary from a donor IRA or other retirement account.

- **Life Insurance:** specified dollar amount of death benefit for which the organization is the designated beneficiary.
- **Bequest:** actuarial value of specified dollar amount or currently estimated residual dollar amount in the donor's irrevocable trust or will.

Donors of estate planned gifts will be listed separately and distinctly from cash and cash equivalent gifts to the campaign.