ALPHA DELTA STATE OHIO EDUCATIONAL FOUNDATION (ADSOEF)

DONOR RECOGNITION POLICY

OPERATING POLICY

Effective Date: 06/11/2019

Review Date(s): 05/15/2023; 05/19/2025; 05/18/2026; 10/19/2026

Revision Date(s): 05/15/2023; 05/18/2026

Number of Pages: 4

I. INTRODUCTION

ADSOEF accepts donations in support of its mission and purposes. ADSOEF recognizes and appreciates the generosity and importance of individuals, businesses, organizations and foundations that invest in its work. The Donor Recognition Policy applies to all people and groups that have donated to ADSOEF, whether in response to annual or special fundraising activities, appeals and campaigns, or through self-determined planned gifts. This policy applies to how the donors of all gifts to ADSOEF will be acknowledged.

In keeping with ADSOEF mission and purposes, and in accordance with the IRS policies relating to charitable giving, the Donor Recognition Policy provides appropriate, timely and donor-centered recognition of all charitable donations and provides public evidence of philanthropic activity that indicates ADSOEF appreciates external support and encourages others to invest.

II. PURPOSE

The Board of Directors (BOD) of ADSOEF will ensure that all donor recognition is

A. APPROPRIATE: All donors to ADSOEF are appropriately recognized for their contribution to its service, accomplishments and growth.

B. TIMELY: All donors are promptly and fairly recognized through a uniform recognition structure.

C. DONOR CENTERED: A positive, on-going relationship is developed with donors through communications that will stimulate their subsequent and/or increased giving, and inspire non-donors to support ADSOEF.

D. PUBLIC EVIDENCE OF PHILANTHROPIC ACTIVITY: All members and non-

members are reminded through recognition that it is the generous financial support of people that has helped build ADSOEF and this support is vital to its future growth and development.

III. DONOR APPRECIATION

The BOD and appropriate Board officers and committee members of ADSOEF will appreciate and recognize all donors according to the following guidelines.

A. GIFT ACKNOWLEDGEMENT

1. All donors will receive a personal thank-you letter/receipt regardless of the size of the gift.

2. ADSOEF will follow current IRS gift substantiation guidelines when issuing acknowledgement letters/receipts for tax purposes.

3. Acknowledgement letters/receipts will be mailed within two to three weeks of receipt of the contribution.

B. ACCOUNTABILITY OF THE USE OF GIFTS

1. All donors may access information via *Foundation Matters,* the monthly ADSOEF newsletter, and website which will inform them of the impact their donations have made.

2. The ADSOEF Report for the Annual Meeting is available on the ADSOEF website. Hard copies will be distributed to those in attendance at an in-person Annual Meeting, and may be distributed electronically when the Annual Meeting is conducted via the internet.

C. EXPRESSIONS OF APPRECIATION FOR GIFTS

1. All donors will be thanked according to the provisions in the Gift Acknowledgement Section III, A, 3 of this policy.

2. In addition, donors may be thanked personally via telephone, email, or hand-written notes.

3. All donors will be listed in the *Foundation Matters*, the monthly ADSOEF newsletter, and in the ADSOEF Report for the Annual Meeting.

IV. DONOR RECOGNITION

The BOD and appropriate Board officers and committee members of ADSOEF will appreciate and recognize all donors according to the following guidelines.

A. GENERAL INFORMATION

1. Permission
   To the best of its ability, ADSOEF will consult the donor and obtain permission of the donor before any public recognition. Requests for donor anonymity shall be respected.

2. Accuracy
   Donors may be consulted to determine the accuracy of spelling and preference for listing before recognition occurs.

3. Timeliness
   Acknowledgement letters/receipts will be made within two-three weeks of receipt of the contribution.

4. In-kind Contributions
   In-kind contributions shall be recognized according to the same guidelines used to recognize cash gifts.

5. Uniqueness
   There may be unique instances which may necessitate recognition outside of these established criteria. Recognition for gifts in this category will be on an individual basis as determined by the ADSOEF BOD.

6. Budget
   An adequate budget will be made available to conduct the donor recognition program.

7. Electronic resources may be used for the purpose of donor recognition.

B. Gifts

Gifts are outright donations to ADSOEF.

C. Endowed Funds

The term endowment is used to refer to donations made to ADSOEF on the understanding that the *capital* or *principal* amount of the donation will be invested with only the investment earnings used to advance specified purposes of ADSOEF.

C. Gift-In-Kind

The term gift-in-kind refers to donations of goods, services, or time.

D. Planned Gifts

The term *planned gifts* is used to refer to donations made to ADSOEF that include bequests, life-income agreements, gifts of life insurance, gifts of retirement assets, and other special planned gifts.

E. Memorials or Tributes

Acknowledgement will be sent to whomever the donor requests if contact information is supplied. The donor will be notified that the memorial or tribute has been received and that the honoree has been notified of same. No amount will be documented on the honoree's note.

F. Special Events

Donor events are held for a variety of purposes: to cultivate donors and prospective donors, to celebrate donations to ADSOEF and thank those donors for their generosity, and to create public awareness about ADSOEF.

G. Donor Acknowledgement

Donor Acknowledgement is an important component of the ADSOEF recognition program. It helps ensure a consistent, planned and timely approach to donor relations. In addition to what is prescribed in this Policy, ADSOEF will take the initiative to customize thank-you activities as appropriate.