



# Alpha Delta State Ohio Educational Foundation

## DONOR RECOGNITION POLICY

### OPERATING POLICY

**Effective Date: 6/11/2019**

**Review Date(s):**

**Revision Date(s):**

**Number of Pages: 4**

### I. INTRODUCTION

Alpha Delta State Ohio Educational Foundation accepts donations in support of the mission and purposes of the Foundation. This document, Donor Recognition Policy, applies to all fundraising activities of the Foundation including, and with respect to, annual giving, planned gifts, special fundraising initiatives, and campaigns. This document applies to the receipt of all gifts.

The Foundation recognizes and appreciates the generosity of individuals, businesses, organizations and foundations that invest in Alpha Delta State Ohio Educational Foundation. Recognizing the financial investment made by our supporters demonstrates the importance of these partners in fulfillment of the Foundation mission and purposes.

In keeping with the Foundation mission and purposes, and in accordance with the IRS policies relating to charitable giving, as well as to help the Foundation fulfill its mission and purposes, the following Donor Recognition Policy has been put in place to

- provide appropriate, timely and donor-centered recognition of all charitable donations;
- elevate donors' sights and serve as a cultivation tool for continued donations;
- guide the public recognition and acknowledgement of all donors; and
- provide public evidence of philanthropic activity that indicates the Foundation appreciates external support and encourages others to invest in the Foundation.

### II. PURPOSE

The Board of Directors of Alpha Delta State Ohio Educational Foundation will ensure that

- A. All donors to Alpha Delta State Ohio Educational Foundation are appropriately recognized for their contribution to the service, accomplishments and growth of the Foundation.
- B. All donors are promptly and fairly recognized through a uniform recognition structure.
- C. A positive on-going relationship is developed with donors that will stimulate their subsequent and/or increased giving, and inspire non-donors to support the Foundation.
- D. All members and non-members are reminded through recognition that it is the generous financial support of people that has helped build the Foundation and this support is vital to the future growth and development of the Foundation.

### **III. DONOR APPRECIATION**

The Board of Directors and appropriate Board officers and committee members of Alpha Delta State Ohio Educational Foundation 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. Alpha Delta State Ohio Educational Foundation will follow current IRS gift substantiation guidelines when issuing acknowledgement letters/receipts for tax purposes.
- 3. Acknowledgement letters/receipts will be mailed within two weeks of receipt of the contribution.

#### **B. ACCOUNTABILITY OF THE USE OF GIFTS**

- 1. All donors may access information via the Foundation's website which will inform them of the impact their donations have made.
- 2. The Foundation Report for the Annual Meeting is available on the Foundation's website and will be distributed to those in attendance at the Annual Meeting.

#### **C. EXPRESSIONS OF APPRECIATION FOR GIFTS**

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

2. In addition, donors may be thanked personally via telephone or hand-written note.
3. All donors will be listed in the ADSOEF Annual Report and in the Foundation Report for the Annual Meeting.

#### **IV. DONOR RECOGNITION**

The Board of Directors and appropriate Board officers and committee members of Alpha Delta State Ohio Educational Foundation will appreciate and recognize all donors according to the following guidelines.

##### **A. GENERAL INFORMATION**

1. **Permission.**  
To the best of its ability, the Foundation 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 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 Foundation Board of Directors.
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 the Foundation.

C. Endowed Funds

The term endowment is used to refer to donations made to the Foundation 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 the Foundation.

D. Gift-In-Kind

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

E. Planned Gifts

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

F. 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.

G. Special Events

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

H. Donor Acknowledgement

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