

FOUNDATION

Recognition Policy

Prepared by

_____ Foundation

DISCLAIMER--This document provides one example of such a policy. Other approaches are possible and may be advisable for your organization. **Organizations should seek their own legal counsel before adopting any policy statement or procedure regarding this matter. NICF makes no legal opinion as to the validity of this document.**

Gift Recognition Policy

An integrated comprehensive gift recognition policy is very important to a fraternal foundation's development program. It honors donors and avoids poorly conceived methods of saying thank you. It also prevents programs that can become expensive and cumbersome to maintain. It also serves the entire development effort whether you are dealing with a one-person operation or a large team operating coast-to-coast.

A gift recognition policy sets the tone for how we thank our donors. Each level of recognition attempts to say thank you in an appropriate and meaningful way.

_____ is blessed due to the fact that our donors are not hung up on recognition other than that it is genuine and respectful.

The _____ Foundation subscribes to Lifetime Giving Clubs. That cumulates people's gifts over time. Currently those giving clubs start at \$100 and goes to \$50,000. This has been a very effective stewardship tool and we mention a donor's lifetime giving figure in mailings during the year and what it will take to reach the next level. At \$100 a Delt gets his name on the donor wall, at \$250 he gets a brick in the courtyard. This is our lowest level of recognition.

As a rule we do not provide premium or gifts for donations. That only changes at the upper giving levels. A lapel pin at \$1,000 to a crystal vase at \$1 Million.

1. For all gifts:

- Thank you letter mailed within 72 hours of receipt of the gift, signed by the Foundation President.
- Donor's name included in appropriate publications.
- Premium
- Receives a special donor newsletter

2. Gifts of \$1,000 to \$10,000 –

All recognition and appreciation as indicated under item one as well as the following.

- Invitation to donor appreciation receptions and special events as appropriate
- Recognition in the headquarters
- Lapel Pin based on level
- Chapter report as well as specific newsletter with inside information
- Directory of other _____ Level members
- Recognition on Website

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3. Gifts of \$10,000 to \$24,999:

All recognition and appreciation indicated under items one and two as well as the following.

- Send thank you letter signed by campaign chairman, mailed within 14 days of receipt of the gift.

4. Gifts of \$25,000+

All recognition and appreciation as appropriate from items one, two and three as well as the following.

- Recognition in the _____ Society
- Lunch or appropriate gift of appreciation: to be determined by the gift recognition committee
- Recognition on the Website and at major Fraternity events.

5. _____ Society

The _____ Society would recognize previous donors and encourage major cash gifts of over \$25,000. To be a member of the _____ Society, one must have given over \$25,000 as a part of this or previous campaigns or an estate gift in excess of \$100,000. Recipients would receive a _____, or some similar recognition and a special reception would be held at Convention to recognize members of the _____ Society. Wives would receive a _____.

A second tier of recognition would involve gifts of cash of \$100,000 or planned gifts in excess of \$500,000. These men would receive special commissioned _____.

6. Heritage Society

The Heritage Society recognizes those loyal members and friends of the Foundation who have included the Foundation in their estate planning. A special newsletter is sent to all members of the Heritage Society as well as a special place of recognition in the headquarters and mention in the annual report.

7. Order of Excellence

Cash gifts in excess of \$250,000 lifetime giving or \$750,000 planned Gift will receive a specially commissioned jeweled badge.

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8. Crystal Vision Award

The Crystal Vision Award is the highest honor to be received from the _____ Foundation. This award is given jointly to the donor and his wife. In each case the award is made of crystal and is for lifetime giving in excess of \$1 million in cash or as a planned gift. Recognition is in the form of a crystal vase. Presentations are only done at special events or conventions. This is the top recognition award of the Foundation.

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