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ID #	DRAFT
Rev	00
Date	6/2/2010
Reso	N/A

Gift Acceptance & Recognition Policy

1.0 PURPOSE

The purpose of the Gift Acceptance and Recognition Policy is to establish a framework for the acceptance and recognition of gifts to the Open Space Authority.

2.0 REVISION HISTORY

Date	Revision	Modification

3.0 PERSONS AFFECTED

- General Manager
- Public Information Specialist
- Accountant

4.0 POLICY

This policy provides guidelines that balance the need to express appropriate and equitable acknowledgement of donors with the need to protect and maintain the values and purposes of the agency.

The Open Space Authority will accept gifts that:

- are consistent and in keeping with the mission, policies, ordinances and master plans of the agency.
- will maintain the integrity and impartiality of and public confidence in the agency.
- become agency property and are subject to its ordinances, policies and procedures.

4.1 Examples of types of gifts accepted

- Cash or checks

- Tangible personal property as listed in the Open Space Authority Gift Needs Inventory
- Real estate
- Planned gifts (beneficiary): retirement plans, life insurance, estate bequests

4.2 Recognition

All gifts will be acknowledged by a letter of acknowledgement and thanks and all gifts will be recognized in the Open Space Authority annual report.

Recognition items meant for public display will be placed in an area designated specifically for the purpose of recognizing gifts and not directly on a donated item. A stewardship structure or area (recognition wall, kiosk, signboard, etc.) will be designated to acknowledge gifts worth \$5,000 or greater.

All gifts to the Open Space Authority will be acknowledged and categorized based on a tiered recognition system determined by the monetary value of the gift. The Open Space Authority does not appraise or set the value of any gift, however for the purposes of recognition only, the value of non-cash gifts shall be estimated based on the purchase price if the item is new, the local going-rate value for equivalent items, or estimated market value (e.g., an account, bonds, real property, etc).

Donors who wish to remain anonymous will be honored as “anonymous” for the purposes and all instances of public recognition, as listed below*.

Recognition items, which are given based on the monetary value of the gift as described below, include:

- Annual Report* – Inclusion in the annual report
- Thank you letter
- Photo greeting card
- High-quality photo of OSA’s choosing and related to the OSA, suitable for framing (5 x 7)
- Commemorative item
- Gratitude Wall*: Stewardship nameplate (on group plaque, most likely located in Admin office)
- Public presentation at board meeting*
- Individual stewardship plaque*

Tiered recognition:

- ALL recognition in the Open Space Authority annual report
- L1 < \$250 thank you letter
- L2 \$250-\$499 letter and gift card
- L3 \$500-\$999 letter and frame-quality photo
- L4 \$1,000-\$4,999 letter + photo + commemorative item
- L5 \$5,000-9,999 letter, photo, commemorative, stewardship nameplate (on group plaque)
- L6 \$10,000-\$24,999 letter, photo, commemorative item, stewardship nameplate, presentation at board meeting
- L7 > \$25,000 letter, photo, commemorative item, individual stewardship plaque, presentation at board meeting

4.3 Conditions

- Placement of objects will be limited in open space areas to those that meet a preserve or recreational necessity and are in accordance with agency policies and plans.
- Upon acceptance, all gifts become the property of the Open Space Authority
- The Open Space Authority is not obligated to replace an object if it is stolen, vandalized, worn out, irreparably damaged or destroyed.
- The Open Space Authority reserves the right to decline a gift for any reason.
- Except for recognition objects listed in section 4.2, the donor is responsible for the total financial cost of allowed recognition objects and their installation, repair or replacement.

4.4 Prohibited Recognition

- Commemorative plaques on Open Space Authority land or property except in built areas designated for that purpose.
- Recognition objects that are memorial in nature (such as benches, rocks, tables, etc.).
- Naming of preserve facilities.
- Naming of natural, cultural or recreational resources.
- Sponsorships – defined as an agreement wherein the donor expects to receive commercial advertising in exchange for a contribution—are prohibited.
- Marketing slogans and taglines are not permitted under any circumstances.
- Recognition is not permitted on donated vehicles.

4.5 Acceptance Procedure

All gifts received shall be reviewed and considered for acceptance by the General Manager.

A Gift Registry of all gifts received shall be maintained. The registry shall include a unique identifying number for tracking purposes, date received, type of item received (check, cash, tangible goods – see types of gifts accepted), amount or value of gift, gift giver's name (unless the donor wishes to remain anonymous, in which case the giver's name will be recorded as "anonymous").

4.5 Gift Needs Inventory (other than cash)

An inventory will be created and maintained by staff that identifies operational needs that would make appropriate gifts.

5.0 DEFINITIONS

- **Donor** – A person, group of persons, corporation, partnership, non-profit organization or any other entity who gives or donates to the Open Space Authority.
- **Gift** – An item, real or personal property, or a monetary donation given voluntarily without payment in return.
- **Gift Needs Inventory** – A list of items developed and maintained by Open Space Authority staff, which are appropriate for donation and meeting the operational needs of the Authority.
- **Gift Registry** – A list of gifts received and accepted by the Open Space Authority.
- **Recognition** – The act of acknowledging a gift or donation.
- **Recognition Items** – Items identified in the Gift Acceptance and Recognition Policy as appropriate for acknowledging a donor's gift to the Open Space Authority.
- **Stewardship Area** – A structure or area specifically designated for the purpose of public acknowledgement of accepted gifts meeting the criteria for such acknowledgement.

6.0 RESPONSIBILITIES

- **General Manager** – Responsible for reviewing and considering acceptance of gift offers, notifying Public Information Specialist of gifts received and forwarding appropriate information to Accounting.
- **Public Information Specialist** – Responsible for tracking all gifts, preparing and delivering acknowledgements and recognition.
- **Accountant** – Responsible for categorizing and tracking monetary and capital gifts.