Sample Donor Appreciation & Recognition Policy
Alaska Pacific University

Purpose
To ensure that:
1. All donors to Alaska Pacific University are appropriately recognized for their contribution to the service, accomplishments and growth of the university;
2. All donors are swiftly and fairly recognized through a uniform recognition structure;
3. 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 university;
4. All visitors, students, staff and faculty are reminded through public recognition, that it is the generous financial support of people that has helped build this great university and community support is vital to the future growth and development of the university.

Policy
Alaska Pacific University will appreciate and recognize all donors according to the following guidelines:

Donor Appreciation
1. Gift acknowledgement
   A. All donors will receive a personal thank you letter/receipt regardless of the size of the gift.
   B. The office of development will follow current IRS gift substantiation guidelines when issuing acknowledgement letters/receipts for tax purposes.
   C. Acknowledgement letters/receipts will be mailed within five business days of receipt of the contribution.

2. Accountability of the use of gifts
   A. All donors will receive the university’s twice-yearly newsletter, “Contact”, which will contain features that inform the donors of the accomplishments their donations have made possible.
   B. Donors of $1,000 or more will become members of the Denali Society and be invited to the annual Denali Society dinner and other events, and will receive special publications as outlined later in this document.
   C. Donors of endowed funds and/or scholarship funds shall receive an annual stewardship report on the value and uses of the fund.
   D. Donors to capital projects/campaigns shall receive individualized stewardship reports as appropriate. This may include facility tours, written reports, recognition ceremonies etc.
   E. The reporting requirements of all grant makers will be fulfilled in a timely and accurate manner.

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F. Once the gift is utilized, the families of planned gift donors will be provided a report on the use of the funds, if appropriate.

3. Expressions of Appreciation for Gifts
   A. All donors will be thanked according to the provision of the acknowledgement section (point 1) of this policy.
   B. In addition, all donors of $1,000 or more will be thanked personally by the president, via telephone or hand-written note, whichever is most appropriate.
   C. Donors of $1,000 or more will be recognized through membership in the Denali Society and through its many associated benefits.
   D. All donors will be listed in the annual donor honor roll listing in the fall edition of “Contact” newsletter.
   E. Along with annual reports, scholarship contributors will receive thank you letters from the recipient(s) of their scholarship.
   F. Alumni donors contributing $100 or more to the annual fund will receive an inexpensive gift item bearing the logo of Alaska Pacific University.
   
   G. An individualized stewardship plan will be created for each major gift donor ($25,000 or more) as determined by the Director of Development. This may include thank you calls or letters from university staff, faculty students or volunteer solicitors, press releases sent to local media, special thank you/recognition events, etc.
   H. Donors making gifts through capital campaigns, or in support of individual capital projects, may also be shown appreciation as part of an overall recognition plan created specifically for gifts to the campaign or facility.
   I. All donors will receive formal recognition according to the University’s Donor Recognition program as addressed later in this policy.

Donor Recognition
I. General
  A. Permission
     To the best of its ability, the university will try to consult the donor and obtain permission before any public listing. Any desire for anonymity will be respected.
  
  B. Accuracy
     All donors who qualify for permanent recognition will be consulted to determine the accuracy of spelling and preference for listing before recognition occurs.
  
  C. Pledges
     Donors who make pledges will qualify for recognition and publicity based on the total pledge amount, in the year the pledge is received. The timing of permanent recognition (such as namings) will be determined by the Director of Development and the APU Development Committee on a case by case basis.
D. In-kind contributions
In-kind contributions of products, services, equipment, furnishings etc. shall receive recognition based on the fair market value of the gift, and shall be recognized according to the same guidelines used to recognize cash gifts.

E. Timeliness of Recognition
Temporary and/or permanent recognition for gifts will be completed as soon as is feasibly possible. The University will work with the donor(s) to determine an appropriate timeline for completion.

F. Uniqueness
It is understood that there will 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 APU Board of Trustees upon the recommendation of the Board Development Committee.

G. Costs
In general, costs of recognition shall not exceed 5% of the value of the gift.

H. Budget
Adequate budget will be made available to conduct the donor recognition program.

II. Recognition Categories and Methods
A. Major Gifts
1. Denali Society
   Individuals and businesses that contribute a minimum of $1,000 (up to $24,999) in cash or in-kind products/services (restricted or unrestricted) in any one year will be recognized as members of the Denali Society. Specific recognition and associated member benefits are based on the following gift levels:
   a. Denali $1,000 - $2,499
   b. Mt. Hunter $2,500 - $4,999
   c. Mt. Foraker $5,000 - $9,999
   d. Mt. McKinley $10,000 - $24,999
   e. Summit Club $25,000 or more

2. Summit Club (businesses and foundations)
   a. Businesses or foundations that make a gift of $25,000 or more in any given year will be recognized for each gift on a case by case basis.
   b. Appropriate recognition will be determined by the Director of Development and donor, and approved by the President. This may include opportunities to sponsor academic programs, events, etc.

3. Leadership giving
   Cumulative gifts, one-time gifts or pledges in amounts of $100,000 or higher made for any purpose (restricted or unrestricted) will be recognized as follows:
a. Magna cum Laude - $100,000 to $499,999  
b. Summa cum Laude - $500,000 to $999,999  
c. Laureate - $1 million or more  
   i. After achieving Magna cum Laude, Summa cum Laude, or Laureate level, the donor will be publicly recognized during an award presentation at the annual APU Denali Society dinner.  
   ii. Magna cum Laude and Summa cum Laude donors will receive an honorary keepsake at the dinner, and their names will be listed on a group plaque located on the APU campus.  
   iii. All Laureates will be recognized with a plaque that gives detail to the donor, their gift and their connection to APU. The donor will receive a plaque for their home/office and APU will maintain a wall of identical plaques located on the APU campus.  
   iv. All donors at the above levels will also be recognized for their leadership giving by being listed in the leadership giving section in the fall edition of “Contact.”  
   v. Additionally, leadership contributors may be listed or recognized further in other university and/or community publications as appropriate.  
   vi. Membership in any of the above categories is permanent, or until such time as the donor achieves a higher recognition level based on additional gifts.  

B. Endowed Funds  
1. Those who pledge or make a gift of $25,000 or more will have the opportunity for recognition by naming the endowment in their name or the name of someone they wish to honor.  
2. In addition, endowment donors will receive recognition within any university publication, printed or on-line, that promotes the use and purpose of the named endowment.  
3. Recognition may also occur at university events, in the press, etc., as appropriate, and based on the desires of the donors and university.  

C. Capital Campaigns/Gifts  
1. Gifts or pledges made in support of a capital campaign or specific facility project will be recognized according to the major gift recognition guidelines stated above.  
2. In addition, special recognition opportunities may also be established for such campaigns or individual facility projects. Donors to these campaigns or projects will also be recognized according to plans set forth for these specific campaigns/projects.  
3. Facilities Naming:  
   a. Restricted gifts: Due to the differing natures, purposes, and costs of capital projects, the naming of buildings, spaces within buildings, or other campus spaces, will normally be determined on a case by case basis in conjunction with the donor, the Director of Development and the APU Board of Trustees.
b. **Naming recognition for unrestricted gifts:** In order to publicly honor those contributors who have generously supported APU with substantial **unrestricted** gifts, the university may offer special naming opportunities for donors whose cumulative unrestricted giving has reached $2 million or more. These namings will be determined on a case by case basis in conjunction with the donor, the Director of Development and the APU Trustees.

c. **Renaming:** Alaska Pacific University reserves the right to rename facilities, spaces or programs that have undergone substantial change, but will continue to honor the donor or individual of importance as outlined below.

d. **Permanence of namings:** It is understood that facility or space naming is typically intended to provide long-lasting recognition to donors for their significant support. In some cases historical names may become obsolete due to extensive facility remodeling, changes in the organizational mission or programs, or other unforeseeable reasons. In these instances, efforts will be taken to notify the donor or family, and to develop an alternative method of recognition that honors the donor or historical persons in perpetuity.

e. **Honoring previous historical namings:** In the event that a facility/space name change is warranted, the original donor will be honored by being included in a special “Legacy of the Past” display located on the APU campus. Displaced plaques or other recognition signage will become part of the display.

D. **Planned Gifts**

1. Donors of bequests, life-income agreements, regular gifts of life insurance, gifts or retirement assets, and other special planned gifts made to APU will be recognized through membership in the Carillon Society.

2. **Membership in the Carillon Society will begin as follows:**
   - a. When APU is notified by the donor (or their advisor) that APU is included in their will,
   - b. When the university has been named beneficiary of an insurance policy or IRA and is duly notified,
   - c. Or when a life-income agreement or other deferred gift agreement is finalized between the university and donor.

3. An individual’s membership in the Carillon Society will be terminated if and when a donor removes the university as a beneficiary of a revocable planned or testamentary gift.

4. Donors making bequests or other planned gifts will also be appropriately recognized as major donors as outlined earlier in this policy. Such recognition will commence in the year that APU is notified of the gift/pledge.

5. If an unexpected testamentary gift is received after a donor’s death, the donor will be recognized as a major donor as outlined earlier in this policy.

6. A special “Carillon Society” plaque located on the APU campus will be used to provide public recognition for these loyal donors. Donors of realized gifts will not be listed on this plaque, but elsewhere as outlined above.
7. Current Carillon Society members will also be recognized each year through a listing in “Contact” and in other printed publications, as appropriate.

8. The donor will also be entitled to select a song, and designate a date on which their musical selection will be played on the APU Carillon each year.

E. Annual Scholarships

1. Those who establish a scholarship fund for annual distribution to students (not-endowed) will have the opportunity for recognition by naming the fund in their name or the name of someone they wish to honor.

2. In addition, these donors will receive recognition within any university publication, printed or on-line, that promotes the use and purpose of the named fund.

3. Recognition may also occur at university events, in the press, etc., as appropriate, based on the amount of the gift and desires of the donors and university.

III. Authority for Administration of Donor Recognition Policies

A. The final authority for resolution of issues relative to these donor recognition policies rests with the APU Board of Trustees after consultation with the APU Development Committee and Director of Development.

B. The Director of Development will administer these policies.

C. The APU Board of Trustees may amend or modify these policies as appropriate.