

# UWG Foundation, Inc. (Foundation) – Recognition and Stewardship Policy

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Governance Oversight by: UWG Foundation, Inc. (Foundation) Resource Development Committee

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## I. Purpose

Recognition is good stewardship and a fundamental means of cultivating donors. The foundation has one donor recognition program with three societies. The purpose of donor recognition societies is (1) to recognize donors and (2) to serve as a pipeline management tool. The aim of this policy is to define the Giving Societies and the roles and responsibilities in administering the Societies.

## II. Definitions

Gifts - Gifts counted are those made to the Foundation.

Eligibility - For annual giving and consecutive giving recognition, donors are recognized based on total outright gifts, pledge payments and paid soft credit items during the Foundation's fiscal year. Pledges and planned gifts are excluded. Gifts made to support life insurance premium payments are considered outright gifts. Recognition is limited to individuals and organizations (i.e., government entities are ineligible). Typically, households are combined into a single recognition unit utilizing the Head of Household.

For cumulative giving recognition, donors are recognized based on cumulative outright gifts and pledges, including soft credits. Pledge payments and legacy gifts until realized are excluded. Gifts made to support life insurance premium payments are considered outright gifts. Individuals and organizations are recognized. Typically, unless otherwise requested, households are combined into a single recognition unit with the exception of legacy giving which is based on each individual donor.

Legacy gifts are defined by the gift acceptance policy. Examples of eligible legacy gifts include:

- Bequests and other estate gifts
- Charitable remainder trusts
- Remainder interest in a residence or farm
- Charitable lead trusts
- Life insurance

### Thirteen Oaks Society

Membership in the Thirteen Oaks Society is extended to donors whose annual gifts are between \$50 and \$999. Contributions are calculated on a fiscal year, July 1 to June 30.

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### Ingram Circle

Membership in the Ingram Circle is extended to donors who make annual gifts of \$1,000 or more through the annual giving campaign. Contributions are calculated on a fiscal year, July 1 to June 30.

### 1906 Society

Membership in the 1906 Society is extended to donors who have cumulative giving of \$50,000 or more. Contributions are calculated on a fiscal year, July 1 to June 30.

### McIntosh Circle

The McIntosh Circle honors in perpetuity those who make a commitment to provide support through their estates by means of wills, bequests, insurance policies, gifts of property, appreciated assets, or charitable trusts. Enrollment in the McIntosh Circle must be documented. Documentation shall be consistent with CASE (Council for Advancement and Support of Education) standards. The Director of Legacy Giving will prepare forms to document planned gifts and enrollment in the McIntosh Circle.

### Red & Blue Society

Membership in the Red & Blue Society recognizes loyal donors at all levels, to any area of UWG. Giving for five or more consecutive fiscal years is the criteria for inclusion in the society. Participation is sustained as long as gifts are made every fiscal year without interruption. Donors can “buy back” years at \$50 for each year missed. Donors are recognized at 5 years, 10 years, 15 years, 20 years, and 30 or more years.

- III. Applicability - Donors, development staff, university faculty, and administrators involved in stewardship.
- IV. Exceptions – None known
- V. Policy Statement

Annual report – All donors, with the exception of government entities, are recognized on-line on the Foundation’s website. The annual report listing for the McIntosh Circle includes both deceased and living individuals and is identified as such. Enrollment is listed in the name of the individual, not under the name of the trust or as “the estate of.” Corporations are eligible for recognition. Typically, households are combined into a single recognition unit. A cancelled gift terminates recognition.

Recognition determinations - For Thirteen Oaks Society, Ingram Circle, 1906 Society and Red & Blue Society, the Director of Annual Giving and the Executive Director of Development determine eligibility and recognition listings. The Director of Legacy Giving determines eligibility and

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recognition listings for the McIntosh Circle. In all cases, the Executive Director of the Foundation retains authority to resolve questions about eligibility for each donor recognition society. The Executive Director of the Foundation or his or her designee determines the benefits for each recognition society. For stewardship and cultivation purposes, donors may be invited to recognition events based on pledges or other criteria.

Stewardship - Gifts of all amounts are acknowledged in writing. Schools and Colleges are notified of every pledge and gift (including legacy gifts) within their program area on a monthly basis. Copies will be sent to the respective major gift officer. A monthly report will be sent to the Executive Director of Development listing all gifts and pledges of \$5,000 or more that do not fall within a School or College. Donors who give or pledge \$5,000 or more should receive written or verbal acknowledgement by the Dean of the College and Development Officer. Letters generated by the Advancement Department will be refreshed every six months by the Coordinator of Donor Relations.

### Acknowledgement Letters

- Athletic Foundation – Donors will receive an acknowledgement letter with tax receipt signed by the Executive Director of the Athletic Foundation.
- All other gifts - Donors will receive an acknowledgement letter with tax receipt signed by the Executive Director of the UWG Foundation. Gifts of less than \$250 will have a stamped signature. Executive Director of UWG Foundation will review all letters.
- Gifts and pledges of \$50,000 and up including legacy gifts –Donor will receive a standard acknowledgement letter with tax receipt (if a cash gift/pledge payment is made). In addition, the Coordinator of Donor Relations will draft a personalized letter for the President’s signature. The Development Officer responsible for the gift will review the letter prior to sending to the President’s Assistant for printing and signature. Letters from the President will be for new gifts and pledges, not payments on pledges.

### Scholarship Signings and UCM Requests for Publicity

#### **Gifts \$25,000-\$49,999**

- Development will take photo
- Draft of spotlight will be sent to UCM for editing
- UCM will provide edited version in 2 weeks or less

#### **\$50,000 or greater**

- Request is submitted to UCM for coverage of signing

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- Development will check with donor for permission of coverage before requesting coverage
  - UCM will **not** be notified if donor does not want publicity
- Details of the request will include the following:
  - Location of signing
  - Date
  - Time
  - Amount
  - Details of agreement and the terms around the agreement in a couple of sentences (i.e. amount over a specific amount of time, where the donation is going)
  - Who will be in attendance?
  - Bio and/or quotes
  - Can we print amount donated?
- UCM reporter will write the story to be posted online by UCM
- Development will create all donor spotlights
- For Perspective Print, Executive Director of Development will provide input on which stories are chosen, but UCM will make the final decision.