

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

Approval Date: February 5, 2015

Effective Date: February 5, 2015

Revision History:

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

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.

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, 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 \$9,999. Contributions are calculated on a fiscal year, July 1 to June 30.

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

There are five levels in the Thirteen Oaks Society:

| | |
|------------------|-------------------|
| Willow Oak | \$50 - \$499 |
| Laurel Oak | \$500 - \$999 |
| Southern Red Oak | \$1000 - \$2,499 |
| Live Oak | \$2,500 - \$4,999 |
| White Oak | \$5,000 - \$9,999 |

Ingram Circle

Membership in the Ingram Circle is extended to donors who make annual gifts of \$10,000 or more through the annual giving campaign. Contributions are calculated on a fiscal year, July 1 to June 30.

There are three levels in the Ingram Circle:

| | |
|----------|---------------------|
| Sapphire | \$10,000 - \$24,999 |
| Ruby | \$25,000 - \$49,999 |
| Diamond | \$50,000 and above |

1906 Society

Membership in the 1906 Society is extended to donors who have cumulative giving of \$25,000 or more. Contributions are calculated on a fiscal year, July 1 to June 30.

There are six levels in the 1906 Society:

| | |
|-------------|-----------------------|
| Pioneer | \$25,000 - \$49,999 |
| Founders | \$50,000 - \$99,999 |
| Centennial | \$100,000 - \$249,999 |
| Heritage | \$250,000 - \$499,999 |
| Benefactor | \$500,000 - \$999,999 |
| Cornerstone | \$1,000,000 and above |

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.

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

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 \$25 per during the 2014/2015 fiscal year, after which the additional gift is \$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 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.