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## PROCEDURE

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**Series:** **Public Relations** **COA: ETH 3**  
**CFOP:**

**Procedure Name:** Donor Recognition and Rights  
**Procedure Number:** PBR-3008  
**Reviewed Date:** 10/13/16  
**Revision #/Date:** 10/04/2019  
**Effective Date:** 02/19/13

**Applicable to:** Brevard Family Partnership Family of Agencies (BFP FOA), Brevard C.A.R.E.S. and Family Allies

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**PURPOSE:** To ensure that donations are properly recorded, donors receive recognition for their contributions, and donors' rights to privacy, when applicable, are respected.

**PROCEDURE:**

**References:** BFP Policies/Procedures: CM 140, CM 160, FM 204, GOV 005, GOV 205, PBR 3001, PBR 3003, PBR 3004, PBR 3005, PBR 3006 - Brevard C.A.R.E.S. Policies/Procedures: GOV BC 1009, OP BC 1031, OP BC 1032

Association of Fundraising Professionals Donor Bill of Rights  
(<http://www.afpnet.org/ethics/enforcementdetail.cfm?itemnumber=3359>)

**Definitions:**

- A. Donor: any person, business or organization that provides support of material value to the organizations.
- B. Donation: any financial or material contribution to the organizations.
- C. Financial Donation: cash, check, gift card, stock, bond or other financial instrument that may be converted to cash or used as a cash equivalent.
- D. In-Kind Donation: any item or service that has a monetary value.

**Procedures:**

Any donation will be recorded and recognized according to the following procedures

1. Financial Donation
  - a. Recorded in the daily log by front-desk personnel and submitted to the Finance Department (FD) for processing.
  - b. A copy of the donation is provided to the Public Affairs Department and the information is recorded in Donation Software.
  - c. A letter of thanks is generated by the Public Affairs Department, along with a tax receipt indicating the donor's name and address, as well as the amount of the financial donation.
  - d. The amount is reported by the Public Affairs Department in its monthly Donation/In-Kind report to the CFO.

## 2. In-Kind Donation

- a. Accepted by any member of the Agency
- b. If a material good (e.g., clothing, appliances, housewares, motor vehicle, etc.), the donor completes an "In-Kind Donation" form indicating their name/business and address, a list of the items donated, and their approximate value.
- c. A letter of thanks is generated, along with a tax receipt indicating the donor's name and address, as well as the noted value of the donation.
- d. If the in-kind donation is of a continuous nature (e.g. monthly discount for products or services, complimentary advertising, etc.), at the end of the calendar year a letter of recognition and thanks is generated, along with a tax receipt indicating the donor's name and address, as well as the total value of the in-kind donation

## Recognition Threshold

All monetary gifts received must be recognized in writing within 5 business days of the receipt of the donation.

- Small gifts received by any of the BFP FOA under \$200 will receive a written thank you from the PR/Marketing department of BFP. Donor contact information should be forwarded to the Senior Executive of Public Affairs including the gift amount
- Medium Donor gifts between \$200 and \$1,000 will receive a written thank you from the CEO of the agency receiving the gift
- Large Donor gifts over \$1,000 will receive a written thank you from the Chief Executive Officer, and gifts over \$10,000 will be a joint letter from the CEO and the Board chair of the agency receiving the gift.
- Special recognition events may be held to recognize large donors, including invitations to company events, or recognition at board meetings.

Each agency will send out tax exempt letters to donors by January 20 of the year following the gift. Signatures on the letters will follow the same thresholds identified above.

All donors are kept abreast of the organization's activities via newsletters, annual reports or other communication vehicles.

## Donor Rights:

It is the intent of Brevard Family Partnership, Brevard C.A.R.E.S., Family Allies, and The National Center for Innovation and Excellence to operate transparently and respect the wishes of its donors when it comes to recognition of their contributions. The following rights are afforded every donor:

1. To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
2. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
3. To have access to the organization's most recent financial statements.
4. To be assured their gifts will be used for the purposes for which they were given.
5. To receive appropriate acknowledgement and recognition.

6. To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.
7. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
8. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
9. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
10. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.
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BY DIRECTION OF THE CHIEF EXECUTIVE OFFICER:



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PHILIP J. SCARPELLI  
Chief Executive Officer  
Brevard Family Partnership Family of Agencies

APPROVAL DATE: 2/3/2020