

Chapter:	Finance and Fund Development		
Title:	Stewardship & Gift Acknowledgement		
Policy: <input checked="" type="checkbox"/> Procedure: <input type="checkbox"/>	Review Cycle: Triennial Author: CDO	Adopted Date: 08.2020 Review Date: 11.2023	Related Policies: Gift Acceptance

Purpose:

This Stewardship and Gift Acceptance Policy sets forward the guidelines by which donors are thanked and acknowledged for gifts to Hopeful Horizons (HH).

Scope:

This policy applies to

- All HH Staff
- Selected HH Staff, as specified: HHs' Chief Executive Officer (CEO) Fund Development Staff
- HH Board Members
- HH Volunteers
- Other:

Policy:

When a personally solicited gift is committed to by a donor, the solicitor shall forward a completed pledge form to the Chief Executive Officer (CEO) or Chief Development Officer (CDO) so the appropriate gift acknowledgement can be generated. Gift acknowledgement shall be commensurate with the gift amount and method of giving as defined by Fund Development procedures. HHs' employees shall comply with the [Donor Bill of Rights](#) in handling all gift acknowledgements.

The designated Fund Development staff person shall enter the donor's information into the Customer (Donor) Relationship Management (CRM) to assure timely reminders for pledge payments.

- A. **Types of Acknowledgements:** HH shall follow IRS requirements regarding acknowledgment of charitable donations. All donors will receive a thank you letter from HH that includes appropriate tax information.
- B. **Levels of Acknowledgement:** Hopeful Horizons has different tiers of recognition based on level and type of giving. Refer to the Stewardship and Gift Acknowledgement Procedure.
- C. **Additional Specifications:** Unless anonymity is requested, all gifts and pledges may be published at HHs' discretion.

Communication and Training:

The Board shall receive a copy of the policy at the time of periodic review and will have an opportunity to ask clarifying questions during the approval process. Employees and volunteers shall receive notice of the Board's policy review and approval including notice of any substantive changes. The notice will provide a link to the policy located on the HH website.

Definitions:

1. Donor-Advised Gift: A donor-advised fund, or DAF, is an account where you can deposit assets for donation to charity over time. The donor gets a tax deduction for making contributions to the donor-advised fund.
2. Solicitor: The person who requests a gift.

Other Related Materials:

[Donor Bill of Rights](#)

Gift Acknowledgement Procedure

References/Legal Authority:

NA

Change Log:

Date of Change	Description of Change	Responsible Party
08.2023	The policy is updated to the new template and includes communication & training, definitions, and other related materials.	E. Hall, Chief Development Officer