

RECOGNITION POLICY AND GUIDELINES
Jewish Community Center of York PA

Approved by the Board of Directors
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INTRODUCTION

The naming or name recognition of facilities, rooms, special use areas and endowments is set forth in this policy to insure that such naming is consistent with the mission of the JCC and its reputation in the community. The Board of Directors shall evaluate proposals for naming and name recognition for those persons or corporations that have had a positive impact on the JCC through philanthropic contributions or through exceptional achievement in service to the JCC.

Donors to the JCC may be recognized for their financial contributions that benefit the programs, projects, and services of the JCC.

MISSION

Our mission, as a premiere Jewish Community Center (JCC) is to strengthen and preserve Jewish culture, promote respect for diversity, support the State of Israel and World Jewry and enhance the well being of the members and communities we service through cultural, education, recreational, social, wellness and child development opportunities.

PURPOSE

The JCC seeks to appropriately recognize donors by providing opportunities to name proposed and existing rooms, spaces, items, programs and endowments in honor of a naming donor, a member of a naming donor's family, a company or organization, an honored supporter of the JCC or other worthy individual. Gifts from these naming donors should have an extraordinary impact on the JCC and be approved by the Gift Acceptance Committee in accordance with the existing Gift Acceptance Policy.

The minimum gift levels listed in this Policy ("Policy") are subject to periodic adjustment, and the JCC retains the right to make changes to this policy or change the minimum gift levels.

The JCC Board of Directors recommends that the following guidelines be adhered to when discussing naming opportunities with prospective donors.

These gift naming guidelines are necessary to:

- Provide guidance to prospective donors and JCC staff about the size and structure of gifts for particular naming opportunities.
- Promote uniform naming levels.
- Ensure that permanent endowments will fully support the desired purposes of the JCC and the donors.
- Provide the mechanism of gift agreements to evaluate proposed major naming opportunities with prospective donors.

TERMS AND DEFINITIONS

Annual Gift: Gifts of cash generally expended during the year in which they are received.

Capital Campaign: A capital campaign is a time-limited effort by a nonprofit organization to raise significant dollars for a specific project.

Endowment: A financial asset donation made to a non-profit group or institution in the form of investment funds or other property that has a stated purpose at the bequest of the donor. Most endowments are designed to keep the principal amount intact while using the investment income from dividends for charitable efforts. Income may be unrestricted or restricted.

Financial Contributions: For the purposes of this policy, this includes all cash contributions for the benefit of the JCC. Contributions of securities will be liquidated upon receipt and the donor will be acknowledged for the cash value at the time the donation is made.

Giving Club/Society: a club or society that gives status or unique benefits to its members. Membership is restricted to individuals who give above a certain level.

Honorific Naming: naming a space for individuals who have given extraordinary service to the JCC.

Major Gift: Currently at the JCC, a gift of \$2,500 or more is considered a major gift to JCC's Annual Giving Program. During capital campaigns, a major gift level will be determined by the campaign committee based on the size of the campaign.

Name recognition: Acknowledges a substantial philanthropic contribution for a building or facility, room, item, special use area with a conspicuously placed plaque. Plaques shall be of standard size and appearance. Standard inscription shall be: "(Room Name); gift by (Donor Name)."

Naming: Refers to titling a building or facility, room, item, program, special use area, or a special purpose endowment. The naming shall be considered either by philanthropy or as an honorific. The name of the individual or corporate entity shall preface the title of the room (e.g. "The Grumbacher Auditorium; Jane Jones Endowment for Early Childhood Education).

Philanthropic gift: A monetary gift or donation to the JCC.

Pledge: Pledges are commitments to give a specific dollar amount according to a fixed time schedule.

Room: A defined area of the JCC, such as a meeting room, office, or any room that is partitioned from other sections of the building.

Special Use Area: Any area within or outside of the JCC building that has a distinct and identifiable purpose.

GENERAL GUIDELINES

All financial contributions shall be acknowledged by letter or note card as soon as possible upon receipt of the contribution. Such correspondence shall include proper tax information. In the case of a memorial or gift contribution, an acknowledgement shall be sent to the honoree or the family of a memorialized person, if applicable. Unless the donor specifies anonymity, donors may be acknowledged by any of the following means: donor wall, annual reports, newsletter listings, and/or special media advertising.

No gift can or will be used in exchange for goods or services at the JCC.

For the purpose of this policy:

- *Space* refers to the building, a room or special use area.
- *Naming opportunities* refer to the titling of the building, rooms, special use areas, items, programs, and endowments in recognition of philanthropic contributions. Only naming opportunities are available for programs and endowments. Typically, only large rooms, areas or the building shall be named for an individual, family, foundation or corporation.
- *Recognition opportunities* serve the important purpose of publicly recognizing the individuals or entities for their philanthropic contributions to the JCC, mainly through the donor's name on a plaque on or near the space, item or area. Recognition opportunities typically involve the recognition of a name on or near rooms, spaces or items; these opportunities are not used for programs or endowments.

ENDORSEMENT

Acceptance of private support through any type of gift (as outlined in the Gift Acceptance Policy) by the JCC is not and should not be interpreted as an endorsement of that donor, any product or programs associated with that donor.

GIFT ACCEPTANCE COMMITTEE

The Gift Acceptance Committee consists of the Executive Director, Chief Financial Officer, Development Director, President of the Board of Directors, Finance Committee Chair and the Fund Development Chair. This committee reviews exceptions to established gift acceptance and recognition issues as appropriate. The President may take issues to the Board's Finance Committee or Executive Committee as necessary.

GUIDELINES FOR NAMING AND RECOGNITION OPPORTUNITIES

Named Endowments

A minimum of \$25,000 is required for consideration for a named endowment. A named endowment may be requested by the donor or proposed by the Board of Directors with permission of the person or corporation to be named. The request shall be evaluated by the Board of Directors for approval.

Named Programs

A minimum of \$100,000 is required for consideration for a named program. Program available for naming are determined by the Gift Acceptance Committee, and the potential donor should contact the JCC to discuss the opportunities.

Ownership

All named property is property of the JCC. The granting of recognition pursuant to this policy confers no property rights or interest upon the donor, individual or entity, either in law or equity, actual or implied, real or personal, whether past, present or future.

Naming and Recognition Opportunities

Naming and recognition opportunities typically occur only during a capital campaign or one-time campaign. Prior to the campaign, the campaign committee will recommend giving levels for

opportunities to the Gift Acceptance Committee for approval. After approval, the JCC has the authority to offer these areas without further approval.

Following a commitment by a donor, the JCC is responsible for communicating in writing with the donor in detail about the recognition they will receive. Naming and recognition of spaces generally requires a contribution based on the size of the space and exposure to the members and visitors of the JCC. The size of the contribution shall be determined by the campaign committee at the time of the project.

The donor may assign recognition to another individual or organization of the donor's choosing. The assignment must be approved by the Gift Acceptance Committee and the chosen individual or organization.

Honorific Naming

All opportunities may be afforded to individuals who have given extraordinary service to the JCC. The individual must have left the service of the JCC, either in the capacity of employee, volunteer, supporter, or trustee, for a period of no less than one year unless otherwise excepted by a board resolution. The board has final authority for such naming.

Sign Design

Signage for named spaces shall be prominent and readily identifiable. Lettering shall be scaled appropriate to the aesthetics of the room or area so named. A plaque shall be featured in such space as well. Room and area plaques shall be of standard size and appearance throughout the building. The JCC has the right to limit the number of characters on signage.

The use of corporate logos must be approved by the Gift Acceptance Committee. All signage and plaques for corporate name recognition will follow the same standards as signs and plaques for individuals.

Duration

Recognition of spaces, items, endowments or programs is intended to be in place for the useful life of the specific space, item, endowment or program.

Renaming and Removal

- If a named space or program is taken out of service, is no longer an operating element of the JCC, or a named space changes function to the extent that the purpose for the naming or name recognition is no longer relevant, then the replaced or renovated structure may be named in recognition of another gift. The JCC shall make a best effort to contact the original donor or other interested parties to whom a plan shall be presented to continue the recognition of the naming gift. This recognition plan may take the form of inclusion of memorabilia or original naming plaques in a place of honor in the building. Following contact with the interested parties, or, if no interested parties can be identified, the Gift Acceptance Committee may approve the recognition plan. In all cases, the JCC will provide tasteful and appropriate recognition of past philanthropy while honoring those whose more recent gifts are integral to the future of our mission.
- If a named space is being renovated, but is maintaining its original purpose, then a second opportunity will be presented with the renovation recognition listed in conjunction with the first name. The named donor or donor's family will have first right of refusal of the renovation recognition.
- If items, including but not limited to equipment, furnishings and buildings, are replaced with new capital items, then the JCC has the right to rename the item and retire the recognition to a place of honor in the building.
- As determined at the sole discretion of the board of directors, the naming or name recognition of spaces shall end if the individual or business is engaged in activities that are in conflict with the JCC's mission and values, or is involved in disreputable or criminal activities that would bring dishonor and embarrassment to the JCC.

- As outlined in the agreement between Donor and the JCC, in the case of failure of the donor to uphold the agreement, the JCC may withdraw the naming commitment.
- The JCC, at its discretion, may remove the name of an organization or corporation that is dissolved.

Agreement between Donor and the JCC

No commitment for recognition or naming shall be made prior to Executive Director’s approval of the proposed name.

All agreements for naming or recognition through philanthropic gifts shall be documented in a Recognition Agreement between the donor and the JCC as found at the end of this policy. In the case of pledged gifts, the agreement may take effect when the JCC receives 50% of payment. If any payment, subsequent to the naming, has not been made within six months after the corresponding dates as listed in the pledge agreement, then any opportunity will be unnamed and made available for another and the donor will receive recognition consistent with the level of support actually received by the JCC. In the case of failure of the donor to uphold the agreement, the JCC may withdraw the naming commitment. The JCC shall notify the donor regarding the consideration to withdraw the name and provide a reasonable time, as determined at the sole discretion of the Gift Acceptance Committee, to correct the deficiency. In the event of removal of the naming, funds already collected shall not be returned to the donor.

Exceptions

The Board of Directors shall have the latitude to approve recognition or remove recognition in serving the best interests of the JCC. Recognition in existence at the time of the adoption of this policy shall remain in effect, subject to future recognition consistent with this policy and subject to restrictions in any gift agreements related to prior recognition.

DONOR RECOGNITION THROUGH ANNUAL GIVING SOCIETIES

Requirements for membership to clubs and societies are determined by the JCC’s Gift Acceptance Committee and are reviewed periodically by the Board of Directors. Gifts to special events do not qualify for membership into a donor club or society. Annual unrestricted/undesignated gifts of cash may be recognized in the Annual Report and other potential marketing materials regardless of the size of the gift. Cumulative annual gifts less than \$118 will be recognized as *supporters* of the York JCC.

Chai Society: Donors contributing a total of \$118 or more in annual unrestricted/undesignated gifts (cumulative) will be recognized as members of the Chai Society in the following categories:

- Innovators: \$1,000 to \$2,499
- Believers: \$500 to \$999
- Dreamers: \$118 to \$499

Mensch Society: Major donors (unrestricted/undesignated, cumulative annual gifts of \$2,500 or more) will be recognized as members of the Mensch Society (published in annual giving materials, website, and other marketing materials) in the following categories.

- Mitzvah Partners: \$2,500 to \$4,999
- Tzedakah Partners: \$5,000 + (start with a 3-year commitment) (Tzedakah partners also receive recognition on JCC letterhead, lobby banner and program guides)

RESTRICTED/DESIGNATED GIFTS

Restricted or designated gifts of cash will be recognized in the donor section of the Annual Report under the appropriate category (i.e. Film Festival Patrons). Contributions made to existing endowments will be recognized in a donor section of the Annual Report and/or other potential marketing materials.

TRIBUTE/MEMORIAL GIFTS

Cash gifts in honor of or in memory of a person or entity will be recognized in a donor section of the Annual Report. Notification of the gift will be sent, as requested, to the person or the family of or representative of the person being honored or memorialized.

PATRON MEMBERS

Patron members pay \$125 per month (\$1,500 per year). Any additional money above the cost of the membership category selected is considered a donation. Patrons are listed in all program guides and Annual Reports. In addition to recognition, patrons receive their own personal locker to use at the JCC.

MATCHING GIFTS

Cash gifts and expected matching gifts will qualify separately for donor recognition in appropriate giving level groups.

DEFERRED GIFTS/SECURITIES/GIFTS OF PROPERTY

Naming or recognition opportunities will not be offered in return for deferred gifts, such as bequests, trusts, annuities, until the gifts are realized. Naming or recognition opportunities will not be considered for persons making gifts of securities or property until converted to cash and received by the JCC. Gifts of securities and property may be recognized in a donor section of the Annual Report. Deferred gifts (aka planned gifts) may be recognized, with the donor's permission, in the L'Dor V'Dor Society.

L'Dor V'Dor Society

Membership includes individuals who have notified the JCC that they have made a planned gift in support of the JCC, or individuals who have remembered the JCC by leaving a planned gift. Planned gifts may include bequests, life insurance, charitable trusts and gift annuities. Also included in this society are gifts to establish an endowment.

IN-KIND GIFTS

Naming and recognition opportunities for in-kind gifts (other than property) will be handled on a case-by-case basis at the discretion of the Gift Acceptance Committee. In-kind gifts may be recognized in a donor section of the Annual Report.

SPONSORSHIPS

Recognition of sponsors for special events will be determined by each event and may vary from year to year. Sponsorships may or may not be 100% tax-deductible

GIFT DESIGNATIONS THROUGH UNITED WAY CAMPAIGNS

The following guidelines apply to designated gifts to the JCC through the United Way Campaign:

- Gifts will be recognized the same as unrestricted gifts of cash, unless otherwise specified by donor to be used as annual or campaign gift
- Gifts will not be identified as United Way designated gifts
- Gifts cannot be used to pay a membership fee, sponsorship or service

GIFTS TO DONORS

Appropriate commemorative gifts for members of clubs or societies may be developed from time to time. Mementos should cost no more than 2% of the value of the donation.

