

## Santa Clara Valley Open Space Authority

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# Gift Acceptance and Recognition Policy

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## 1. PURPOSE

The purpose of the Gift Acceptance and Recognition Policy is to establish a framework for the acceptance and recognition of gifts to the Open Space Authority.

## 2. REVISION HISTORY

Date	Revision	Modification
6/10/2010	00	New Policy
4/28/2022	01	Revised policy

## 3. DEFINITIONS

- **Donor** – A person, group of persons, corporation, partnership, non-profit organization, or any other entity who gives or donates to the Open Space Authority, except that this policy shall not apply to formal grants received as a result of applications for funds submitted by the Open Space Authority.
- **Gift** – An item, real or personal property, or a monetary donation given voluntarily without compensation in return.
- **Recognition** – The act of acknowledging a gift or donation.
- **Recognition Type** – Recognition identified in SECTION 6.2 of this Policy as appropriate for acknowledging a donor's gift to the Open Space Authority.

## 4. PERSONS AFFECTED AND RESPONSIBILITIES

Department	Position	Task
Leadership	General Manager	Responsible for reviewing and considering acceptance of gift offers.
Public Affairs	External Affairs Manager	Accountable for overseeing the proper implementation of the Gift Acceptance and Recognition Policy
Public Affairs	Public Information Officer (PIO)	Responsible for confirming accurate information is inputted into gift acknowledgement letters, notifying accounting and Leadership team of any gifts that are subject to discussion

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		(including gifts that fall under Level 1 or 2 for recognition), or gifts that require approval through the General Manager.
Administrative	Office Assistant (and/or) Administrative Assistant	Responsible for gift intake via mail or in person, tracking and handling gifts received in the office as outlined in administrative procedures, filling in the gift acknowledgement letter template and sending any supporting gift documentation to the PIO for review, and mailing approved thank you letters.
Administrative	Accountant	Responsible for depositing cash donations and recording monetary donations in the general ledger.

### 5. ACCEPTANCE PROCEDURES

- All gifts are subject to review and consideration for acceptance by the General Manager.

### 6. POLICY

This policy provides guidelines that balance the need to express appropriate and equitable acknowledgement of donors, with the need to protect and maintain the values and purposes of the agency.

- All donations received by the Open Space Authority will be used solely for public benefit in support of the mission to protect natural and working landscapes and connect people to nature.
- The Open Space Authority can accept gifts that will maintain the integrity and impartiality of and public confidence in the agency.
- Gifts to the Open Space Authority become agency property and are subject to its ordinances, policies, procedures, and priorities.

#### 6.1 EXAMPLES OF GIFTS ACCEPTED

- Cash or checks
- Tangible personal property
- Real estate
- Planned gifts (beneficiary): retirement plans, life insurance, estate bequests.

#### 6.2 RECOGNITION

All donations shall receive a thank you letter and receipt for income tax purposes. The Open Space Authority is a tax-exempt public agency and therefore donations may be tax deductible as allowed by law. Donors should consult their tax advisor to determine deductibility of their donations.

The Open Space Authority does not appraise or set the value of any gift. For tax and recognition purposes, the donor is responsible for providing the appraised value of non-cash gifts.

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Tier	Amount	Recognition Type
ALL	ALL	<ul style="list-style-type: none"> <li>• “Thank you” letter signed by Public Information Officer. The General Manager, under their discretion, may issue a personalized “thank you” letter.</li> </ul>
Level 1	\$10,000 +	<ul style="list-style-type: none"> <li>• Recognition during Board of Directors meeting*</li> </ul>
Level 2	\$25,000 +	<ul style="list-style-type: none"> <li>• Recognition during Board of Directors meeting*</li> <li>• Property tour with Open Space Authority staff*</li> </ul>

\*Arranged with consent from the donor.

### 6.3 CONDITIONS

- Upon acceptance, all gifts become the property of the Open Space Authority.
- The Open Space Authority reserves the right to decline a gift for any reason.
- The General Manager may, at their discretion, consider placement in a preserve of a bench or other recognition object.
- The General Manager shall have discretion regarding placement of such objects in the preserves. These objects may be limited to items that meet a preserve or recreational necessity as determined by staff and the General Manager and in accordance with agency policies and plans.
- The Open Space Authority is not obligated to replace these objects if stolen, vandalized, worn out, irreparably damaged or destroyed.

### 6.4 PRIVACY AND INFORMATION SHARING

- Donors who wish to remain anonymous may indicate this on the donation intake form and will be honored as “anonymous” for the purposes and all instances of public recognition.
- All records, including donations, maintained by the Open Space Authority may be required to be disclosed pursuant to the California Public Records Act unless otherwise exempt from disclosure.

### 6.5 PROHIBITED FORMS OF RECOGNITION

- The Open Space Authority does not accept donations in exchange for the naming of facilities, natural, cultural, or recreational resources.
- Agreements wherein the donor expects to receive commercial advertising, use of marketing slogans, logos, and taglines in exchange for a contribution are prohibited.
- Recognition is not permitted on donated vehicles.
- Donations can be made towards specific programs and/or public amenities. However, the Open Space Authority does not solicit for or offer commemorative plaques on land or property in exchange for donations.
- Non-gift related recognition items may be considered by the General Manager on a case-by-case basis. The General Manager is responsible for reporting public-facing recognition item proposals to the Open Space Authority Board of Directors.

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### **6.6 MEMORIAL GIFTS AND DONATIONS**

- Donors who wish to donate “in memory” or “in honor” of someone may choose to do so on the donation intake form.
- Family members of the person for whom a gift was made “in memory of” may request a summary of donations made in the person’s memory, and shall include donor name, if the donor has not requested anonymity. Donors who wish to remain anonymous can indicate this as outlined in Section 6.4 PRIVACY AND INFORMATION SHARING.
- Requests for information must be submitted via email at [info@openspaceauthority.org](mailto:info@openspaceauthority.org)