



Gift Acceptance and Recognition Policy

**Board of Directors Meeting
Thursday, April 28, 2022**

**Presented by Charlotte Graham
Public Information Officer**

Background Gift Acceptance and Recognition Policy



- Original policy created in 2010.
- Purpose: Establish a framework for the acceptance and recognition of gifts to the Authority.



Sections 3.0 & 4.0 Definitions & Persons Affected

- Moved to the top of the document
- Definitions added to "Donor"
- Combined Sections
 - 3.0 Persons Affected
 - 6.0 Responsibilities
- Staff titles
- Additional staff added

Section 6.2: Recognition

2010 Tier System

- ALL - recognition in the Open Space Authority annual report
- L1 <\$250 - thank you letter
- L2 \$250-\$499 - letter and gift card
- L3 \$500-\$999 - letter and frame-quality photo
- L4 \$1,000-\$4,999 - letter + photo + commemorative item
- L5 \$5,000-9,999 - letter, photo, commemorative item, stewardship nameplate (on group plaque)
- L6 \$10,000-\$24,999 - letter, photo, commemorative item, stewardship nameplate, presentation at board meeting
- L7 >\$25,000 - letter, photo, commemorative item, individual stewardship plaque, presentation at board meeting

New Tier System

- ALL - “Thank you” letter
- L1 \$10,000+ – Recognition during Board of Directors meeting*
- L2 \$25,000 + Recognition during Board of Directors meeting & Property Tour with OSA Staff*

*Arranged with consent from the donor.



Section 6.4 Privacy and Information Sharing

- New section
- Donor anonymity
- California Public Records Act



Sections 6.3 & 6.5: Conditions and Prohibited Recognition

- Section 6.3 CONDITIONS:
 - Non-gift related recognition objects subject to review and approval.
- Section 6.5 PROHIBITED FORMS OF RECOGNITION:
 - Objects and plaques are not to be offered or solicited in exchange for donations.

Section 6.6: Memorial Gifts & Donations

- New section
- Outlines how to donate "in memory" or "in honor"
- Describes public procedures for requesting information from Open Space Authority related to memorial gifts.



A scenic landscape photograph. In the foreground, a cluster of bright orange poppies grows on a rocky, grassy slope. The background shows a wide valley with a winding road, a small town, and distant mountains under a clear sky. The word "QUESTIONS?" is overlaid in large white letters.

QUESTIONS?