

## ABCUSA Naming & Policy Recommendations – Draft NO 1

### GIVING SOCIETIES

In general, the ABCUSA General Secretary's Circles with five Gift Societies has served ABC well over the past decade plus. Annual gifts of \$25 to \$10,000 plus were encouraged and linked to one of five societies.

Today, no matter restricted or unrestricted, widow's mite or transformational all donors should be recognized and stewarded for their gift decision in a meaningful manner (individuals, corporations, foundations, planned gifts, churches, regions and ABCUSA affiliated organizations). A letter of appreciate and all afforded stewardship recognition activities shall be provided at each respective level of a designated giving society as developed by the Office of the ABCUSA General Secretary's Development Office and recommended to the full ABCUSA Board of General Ministries by the ABCUSA Development Advisory Team (DAT). Giving Societies will be reviewed for necessary revisions and adoptions every two years.

The following levels of annual gifts will be afforded recognition within each Annual Report:

\$ 1 to \$ 24.99  
\$ 25 to \$ 99.99  
\$ 100 to \$ 999.99  
\$ 1,000 to \$ 4,999.99  
\$ 5,000 to \$ 24,999.99  
\$ 25,000 to \$ 99,999.99  
\$ 100,000 to \$249,999.99  
\$ 250,000 to \$499,999.99  
\$ 500,000 to \$999,999.99  
\$1,000,000 plus

Level Code ID#	Giving Society (note: proposed societies name)	Current Circle Recognition in Red	Minimum Gift Required
1	Patron Society	<i>TBD</i>	\$1
2	Samaritan Society	<i>Helen Barrett Montgomery Circle</i>	\$25
3	Cornerstone Society	<i>Jitsuo Morikawa Circle</i>	\$100
4	Grand Society	<i>Leonard Ballesteros Circle</i>	\$1,000
5	Sower's Society	<i>Albert Paul Brinson Circle</i>	\$5,000
6	Founder's Society	<i>Adoniram Judson Circle (AJC)</i>	\$10,000
7	Centurion's Society	<i>TBD(AJC)</i>	\$25,000
8	General Secretary's Society	<i>TBD(AJC)</i>	\$100,000
9	Steward's Society	<i>TBD(AJC)</i>	\$250,000
10	Transformational Society	<i>TBD(AJC)</i>	\$500,000
11	Mission Society	<i>TBD(AJC)</i>	\$1,000,000 plus

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12	<b>Endower's Society</b>	<b>TBD</b>	<b>All Bequests, Wills or Estate Gifts</b>
13	<b>Legacy Society</b>	<b>TBD</b>	<b>Life-Time Giving \$25,000+</b>

**Note:** Independent of the gift's charitable purpose towards ABCUSA's mission and vision, all donors will be recognized annually in one or more of the above giving societies --- level code 12 and 13 are intended to cultivate and promote a stronger awareness of planned giving.

The proposed society names should be aligned with specific recognition actions. Certainly, the diversity of ABC should be reflected in the Society Names. All donors would receive year-end tax receipt, letter of gift appreciation, name recognition in ABCUSA publications (newsletter with a special thanks to newly enlisted donors in each periodic issue, Connection, Annual Reports/Summary, etc.), as well as periodic personal invitations to special events. All donors should be listed by their respective society or circle. **Note:** The highest gift level should be entitled to each of the suggested subsequent benefits listed, in addition to consideration given for participation on select advisory committees.

Level Code ID#	Minimum Gift Level	General Recognition Actions	Society Name or Giving Club
1	\$1	Letter of Appreciation	<b>Patron</b>
2	\$25	Letter of Appreciation Annual Report Listing	<b>Samaritan</b>
3	\$100	Letter of Appreciation Appreciation Certificate Annual Report Listing Newsletter Recognition	<b>Cornerstone</b>
4	\$1,000	Letter of Appreciation Appreciation Certificate Annual Report Listing Newsletter Recognition 1 Grand Club Donor Luncheon Invitation <i>ABC Alumni Interaction Site</i>	<b>Grand</b>
5	\$5,000	Letter of Appreciation Appreciation Certificate Annual Report Listing Newsletter Recognition 1 Grand Club Donor Luncheon Invitation <i>ABC Alumni Interaction Site</i> Private Recognition Event	<b>Sower's</b>
6	\$10,000	Letter of Appreciation Annual Report Listing Newsletter Recognition 1 Grand Club Major Events Invitations	<b>Founder's</b>

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		Donor Luncheon Invitation <i>ABC Alumni Interaction Site</i> Private Recognition Event Commemorative Plaque Outcome Report & Update Letters	
7	\$25,000	Letter of Appreciation Annual Report Listing Newsletter Recognition 1 Grand Club Major Events Invitations Donor Luncheon Invitation <i>ABC Alumni Interaction Site</i> Private Recognition Event Commemorative Plaque Outcome Report & Update Letters	<b>Centurion's</b>
8	\$100,000	Letter of Appreciation Annual Report Listing And Newsletter Recognition 1 Grand Club Major Events Invitations Donor Luncheon Invitation <i>ABC Alumni Interaction Site</i> Spec. Dedication Events Commemorative Plaque Outcome Report & Update Letters Corporate Wall of Honor Two Year Web Salute	<b>General Secretary's</b>
9	\$250,000	Letter of Appreciation Annual Report Listing And Newsletter Recognition 1 Grand Club Major Events Invitations Donor Luncheon <i>ABC Alumni Interaction Site</i> Spec. Dedication Event Commemorative Plaque Outcome Report & Update Letters Corporate Wall of Honor Three Year Web Salute	<b>Steward's</b>
10	\$500,000	Letter of Appreciation Annual Report Listing & Newsletter Recognition 1 Grand Club Major Events Invitations Donor Luncheon <i>ABC Alumni Interaction Site</i> Spec. Dedication Event	<b>Transformational</b>

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		Commemorative Plaque Outcome Report & Update Letters Corporate Wall of Honor Five Year Web Salute	
11	\$1,000,000+	Letter of Appreciation Annual Report Listing & Newsletter Recognition 1 Grand Club Major Events Invitations Donor Luncheon <i>ABC Alumni Interaction Site</i> Spec. Dedication Event Commemorative Plaque Outcome Report & Update Letters Corporate Wall of Honor Five Year Web Salute	<b>Mission</b>
12	<b>Any Amount by Will or Estate</b>	Letter of Appreciation Annual Report Listing & Newsletter Recognition Invitation Periodic Society Events Donor Luncheon <i>ABC Alumni Interaction Site</i> Corporate Wall of Honor Outcome Report & Update Letters	<b>Endower's</b>
13	\$25,000+	Letter of Appreciation Annual Report Listing & Newsletter Recognition Recognition Event Corporate Wall of Honor Invitation Periodic Society Events Donor Luncheon <i>ABC Alumni Interaction Site</i>	<b>Lifetime Giving Society</b>

### **Transformational Gift Society**

Those who commit a magnanimous gift of \$500,000 or more will be invited to become a member of the ABCUSA “*Transformation Society*”. By their very nature, charitable contributions at this level will significantly impact current and future opportunities to fund our mission and commitment to compassionate and quality ABCUSA Capacity Building and Ministries. The number of Transformational Society members will be exclusive and limited. All members of this society will be entitled, but not limited to the following benefits:

- Special dedication event for a new Endowment Fund or Facility provided in their name or partnership, or an individual or family recognition or memorial gift.
- All gifts from to an ABCUSA endowment fund will be made under the fund’s selected dedication name in perpetuity with periodic reports and communication of results.

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- All references in electronic, print and personal references to the ABCUSA facility or ministry funded will be referred to by the name selected by the donor as accepted by the ABCUSA Board of General Ministries.
- Prominent recognition of the named fund or facility or project will be provided for five years in all major ABCUSA publications or events held within the named facility.
- Recognition list, article and personal photo, will be provided on the inside or back cover of the ABCUSA annual report within the year the transformation gift is consummated.
- Invitation to participate in a special awards ceremony at the named facility/ministry, preceded by an invitation only event, dinner or luncheon with the General Secretary, the BGM Executive Team, other honored guests and local/regional communications or press.
- Special recognition acknowledgement will be provided, if selected by the donor, for three years within the periodic issue of the ABCUSA Connections Newsletter.
- Personalized commemorative plaque will be provided to the donor, with the placement of a commemorative plaque at the ABCUSA corporate office or at the site of the selected naming opportunity.
- An invitation to participate in a Biennial Transformation Society Awards Event & others.
- ABCUSA Online website recognition of donor within the transformational gift circle for a period of five years, unless electing anonymity.
- Quarterly itemized update letter on the impact delivered as a measureable outcome through the donor's transformational gift.

### **Donor Bill of Rights**

Philanthropy is based on voluntary action for the greater good. Towards a much higher good, faith giving is an act of worshiping & trusting God. It is an ABCUSA tradition of giving that is primary to improving the quality of lives through ministries. To assure that philanthropy merits the respect and trust of our ABC family & the general public, and that donors and prospective donors will develop full confidence in ABCUSA and all ABC Mission Center affiliated entities and their ministries, we declare that all donors have the following rights:

1. To be informed of the organization's mission, of the way the ABCUSA 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 ABCUSA's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities;
3. To have access to ABCUSA's most recent financial statements or summation;
4. To be assured their gifts will be used for the documented purposes for which given;
5. To receive appropriate acknowledgment and recognition, in a timely manner;
6. To be assured that information about their donation is handled with respect and with utmost confidentiality within ABCUSA policies and procedures;

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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 ABCUSA or its affiliated corporations and organizations *or* hired consultants or solicitors;
9. To have the opportunity for their names to be suppressed from mailing lists that the ABCUSA may intend to share with those within the ABC family of affiliated corporations or organizations; *and not* to sell, rent or lease such lists to entities outside ABC; and
10. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

*The text of this statement in its entirety was modified based on the initial statement developed by the American Association of Fund-Raising Counsel (AAFRC), Association for Healthcare Philanthropy (AHP), Council for Advancement and Support of Education (CASE), and the Association of Fundraising Professionals (AFP), and adopted in November 1993.*

### **Ethical Principles**

**Personal Integrity** - Individual members of the ABCUSA Development Staff corporate and affiliated staff and volunteers involved with donor solicitations will:

- Be fair and honest and conduct themselves with integrity;
- Not maintain any vested interest in a professionally related activity that could result in personal gain without prior full disclosure and BGM approval;
- Respect that their relationships with prospective donors, donors, volunteers, and employees are professional relationships and may not be exploited.

**Confidentiality** - Individuals will:

- safeguard and respect all donor and prospective donor information;
- honor the wishes of an individual and/or organizational constituent with regard to how directory information and/or giving history is used;
- record and keep only information relevant to cultivation, solicitation, and stewardship;
- identify the source of retained information, when asked by donor;
- safeguard prospective donor, donor, and other constituent lists compiled by ABCUSA as the property of the BGM; these lists may not be distributed or used for unauthorized purposes or for personal gain;
- make every effort to ensure that volunteers, vendors, and external entities with access to constituent information understand and agree to comply with the organization's confidentiality and public disclosure policies.

**Public Trust** - Individuals will:

- ensure donated funds are used in accordance with the donor's intentions or approved ministry/case elements in which gift was given;
- obtain specific instructions from a ABCUSA donor on altering conditions of a restricted gift (consistent with applicable law);
- provide prompt, responsive and truthful replies to donors and public inquiry in accordance with the ABCUSA's stated **communication policies**;
- place the missions and ministries of the ABCUSA and its donors above any personal gain;

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- pursue only gifts that are within, or advance, ABCUSA's mission and/or approved priorities.

### Disclosure - Individuals will:

- be truthful about the institution's mission, intended use of funds, and capacity of ABCUSA to use donations effectively for the intended purpose;
- be truthful and specific about the identification of the ABCUSA organization they represent and their employment or volunteer status or approved and authorized solicitor status;
- understand and disclose their areas of expertise and will give appropriate advice regarding the involvement of the donors' legal, accounting, financial and/or tax advisors;
- help ensure appropriate, consistent accounting, budgeting, and GAAP reporting methodologies.

### Compensation - Individuals will

- not accept commission-based compensation or compensation based on a percentage of funds raised, nor will bonuses be offered as a result of fundraising success;
- not accept external compensation for the receipt of a gift or information leading to a gift;
- agree not to compensate individuals in respect of a gift or information leading to a gift.

### Appendices

Tactical Sample Illustration other opportunities would be advanced:

There are numerous opportunities to financially support kingdom building through ABC. True recognition for sacrificial giving of course comes from the Lord. The following temporal benefits are intended as an expression of appreciation for support by past generations of American Baptists and friends (memorial and commemorative expressions of thanks) as well as a celebration by current generations to help accomplish unmet ministry and capital needs:

- ☐ All donors would be listed within a Commemorative Booklet
- ☐ All donors would be listed on an electronic display monitor within the facility atrium
- ☐ All donors would be invited to have their commemorative brick placed on the proposed exterior brick walkway or (if applicable Prayer Garden Wall)

The following Paver Recognition Example is provided for your information:

Guesstimate Estimated Prospects	Interior Wall and Memory Garden /Paver Brick Recognition	Est. Gvg Hshlds	Est. Unit Cost	Total Est Cost	Suggested Giving Amount	Total Est. Amount
1,000	Specialty Engraved Script, color on Large Brick with logo	100	\$ 150	\$15,000	\$ 2,500	\$ 250,000
5,000	Engraved Script, color on Medium size Brick with logo	500	\$ 75	\$37,500	\$ 1,250	\$ 625,000
10,000	Printed Name on Medium size Brick with logo	1,000	\$ 40	\$40,000	\$ 500	\$ 500,000
20,000	Printed Name on Brick with logo	2,000	\$ 30	\$60,000	\$ 300	\$ 600,000
Many	Printed Name on Brick	1,500	\$ 20	\$30,000	\$ 150	\$ 225,000
	<b>Total Estimate</b>	<b>5,100</b>	<b>\$36</b>	<b>\$182,500</b>	<b>\$431</b>	<b>\$ 2,200,000</b>

*All donors would be recognized within a Commemorative Booklet (technology). Additionally a commemorative foyer wide-screen display could recognize all donors. An actual walkway or prayer garden would be ideal on the building grounds.*