

1 **GEORGIA STATE UNIVERSITY FOUNDATION, INC.**

2 **Procedure number/name:** 2.1b Donor Recognition Procedure

3 **Issuing date:** 1/11/2013 **Effective date:** 1/11/2013

4 **Related policy number/name:** 2.1 Gift Acceptance Policy, Title I

5 **Procedures Approved by:** Vice President for Development, 1/11/2013

6 **I. Introduction**

7 Recognition is good stewardship and a fundamental means of cultivating donors. The foundation has  
8 one donor recognition program, the Presidents Society, with four circles: Leaders Circle  
9 (cumulative lifetime giving of \$1 million or more); Benefactors Circle (cumulative lifetime giving of  
10 \$100,000 to \$999,999); Partners Circle (annual [fiscal year] giving of \$1,000 or more); and the  
11 Legacy Circle (planned giving). The Presidents Society is designed to recognize donors to the  
12 Georgia State University (GSU) Foundation and to the university and other cooperative  
13 organizations. The purpose of donor recognition societies is (1) to recognize donors and (2) to  
14 serve as a pipeline management tool. The aim of this procedure is to define the Presidents Society  
15 circles and to define the roles and responsibilities in administering the Presidents Society. This  
16 procedure replaces and expands upon the “Donor Recognition Procedure” approved Dec. 1, 2008.  
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18 **II. Revision history**

19 Originally adopted as President’s Society Procedure on 8/9/2006.

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21 Revised November 2008 and January 2013.  
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23 **III. Definitions**

24 **A. Gifts**

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26 I. Gifts counted include those made to the GSU Foundation, GSU, and other GSU cooperative  
27 organizations, such as the GSU Alumni Association, GSU Research Foundation and the GSU Risk  
28 Management Foundation.  
29

30 Specifically gifts counted include those made to funds groups 02 (GSU Foundation), 03 (GSU  
31 Research Foundation), 05 (GSU Risk Management Foundation), 06 (GSU) groups, and 08 (GSU  
32 Alumni Association). Also included are gifts to old inactive funds groups 01, 04, and 07.  
33

34 **2. Excluded**

35 Specifically excluded is fund group 99 (non-gifts).  
36

37 **B. Annual gifts: The Presidents Society Partners Circle.**

38 I. Eligibility. For annual giving recognition, donors are recognized based on total outright gifts,  
39 pledge payments and paid soft credit items during the foundation’s fiscal year. Pledges and  
40 planned gifts are excluded. (Gifts made to support life insurance premium payments are  
41 considered outright gifts.) Recognition is limited to individuals (i.e., organizations and  
42 government entities are ineligible). Typically, households are combined into a single  
43 recognition unit with head of household listed first.  
44

45 **2. Presidents Society Partners Circle**

46 a) Purpose. Presidents Society Partners Circle recognizes leading donors in the year they  
47 make their gifts.

48 b) Levels. There are three levels in the Partners Circle:  
49 White (\$1,000 to \$2,499); Blue (\$2,500 to \$4,999); Silver (\$5,000 or more).

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51 **C. Cumulative Lifetime Giving: Leaders and Benefactors Circles**

52 1. Purpose. The Presidents Society Leaders and Benefactors Circles, formerly known as  
53 “Cumulative Lifetime Giving,” recognize leadership donors who have achieved milestones in  
54 their lifetime giving to the university.

55 2. Eligibility. Donors are recognized based on cumulative outright gifts and pledges, including  
56 soft credit. Pledge payments and planned gifts are excluded. (Gifts made to support life  
57 insurance premium payments are considered outright gifts.) Individuals and organizations are  
58 recognized. Typically, households are combined into a single recognition unit with head of  
59 household listed first.

60 3. Levels. Cumulative lifetime giving has the following levels:

61	• Leaders Circle	
62	Langdale	\$10 million or more
63	Sparks	\$5 million to \$9,999,999
64	Patton	\$1 million to \$4,999,999
65		
66	• Benefactors Circle	
67	Kell	\$500,000 to \$999,999
68	Suttles	\$250,000 to \$499,999
69	University	\$100,000 to \$249,999
70		

71 **D. Planned giving: Legacy Circle**

72 1. Purpose. Originally named the Heritage Society, this giving group was established in 1989 to  
73 recognize donors who have made planned gifts that have the university or one of its  
74 cooperative organizations designated as a beneficiary.

75 2. Eligibility. Planned gifts are defined by the gift acceptance policy. Examples of eligible gifts  
76 include:

- 77 • bequests and other estate gifts
- 78 • IRA’s and other retirement plans (excluding lifetime IRA rollovers which are considered
- 79 outright gifts)
- 80 • charitable gift annuities
- 81 • charitable remainder trusts
- 82 • gifts of residence or farm with retained life estate
- 83 • charitable lead trusts
- 84 • life insurance policies
- 85

86 E. Levels. The Legacy Circle shall have no levels but the vice president for development/president of  
87 the foundation reserves the authority to reconsider this provision in the future.

88 F. Documentation. Enrollment in the Legacy Circle must be documented. Documentation shall be  
89 consistent with NCPG counting guidelines or CASE standards. Legacy Circle donors listed in the  
90 foundation's annual report for fiscal year 2003 are deemed to have given permission for listing and  
91 enrollment in the society though no documentation is on file. The director of gift planning will  
92 prepare forms to document planned gifts and enrollment in the Heritage Society.

93

#### 94 **IV. Persons affected**

95 Donors, development staff, university faculty, and administrators involved in stewardship.

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#### 97 **V. Roles and responsibilities**

98 The Office of Donor Relations is primarily responsible for donor recognition at the university level.

99

#### 100 **VI. Procedures**

101 A. Annual report. Donor recognition societies are recognized in print by listings in the foundation  
102 annual report. Though not included in donor recognition societies, corporations, foundations,  
103 other organizations and government entities are listed in the annual report at the levels for  
104 which they qualify. Consistent with custom, such listings are separated from the individual  
105 donor listing (an example is the *2007 Georgia State University Foundation Annual Report*).

106 The annual report listing for the Legacy Circle includes both deceased and living individuals.  
107 Enrollment is listed in the name of the individual, not under the name of the trust or as "the  
108 estate of." In some cases, corporations are eligible for recognition (e.g., a term of years  
109 charitable remainder trust). Typically, households are combined into a single recognition unit.  
110 A cancelled gift terminates recognition.

111 B. Recognition determinations. For Presidents Society Leaders, Benefactors, and Partners Circles,  
112 the director, donor relations and communications, determines eligibility and recognition  
113 listings. The director of gift planning determines eligibility and recognition listings for the  
114 Legacy Circle. In all cases, the vice president for development/president of the foundation  
115 retains authority to resolve questions about eligibility each donor recognition society.

116 C. Perquisites. The vice president for development/president of the foundation or his or her  
117 designee determines the "perks" for each recognition society. For stewardship and cultivation  
118 purposes, donors may be invited to recognition events based on pledges or other criteria  
119 (such as a 7-figure prospect).

120 D. Event invitations. Staff planning events for donor recognition circles has flexibility in extending  
121 invitations to Presidents Society events. Former and prospective donors, for example, may be  
122 included in the invitation list as a cultivation strategy.

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127 **HELP**

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129 **Contact**

130 Director, Donor Relations and Communications

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133 **Additional information and resources**

- 134 • Gift acceptance policy
- 135 • University fund-raising policy
- 136 • Soft credit procedure

**Office**

I Park Place, Suite 549

**Phone**

(404) 413-3424