



Manhattan Beach Education Foundation
DONOR RECOGNITION PROJECT POLICIES & PROCEDURES

August 26, 2021

1) INTRODUCTION AND PURPOSE

- A) To celebrate past support and grow future support, the MBEF and Endowment Boards have introduced a Donor Recognition Project (“project”) to publicly recognize all who share the vision and mission of MBEF of strengthening public schools in Manhattan Beach, particularly those donors who have contributed significantly.
- B) In collaboration with the City of Manhattan Beach, a designated location has been approved by all parties for the installation of the project. The approved location is in Metlox Plaza on the North West corner wall next to Waterleaf and across from Shade Hotel.
- C) An artist will be commissioned, in joint approval by the MBEF Board and City of Manhattan Beach, to design and install an artistic art piece that embodies the essence of MBEF, while also recognizing its key donors.
 - 1) The project will be designed to allow for the recognition of past donors who qualify through MBEF’s donor criteria, as well as the addition of future qualified donors.

2) POLICY

- A) Donation Criteria
 - 1) The Board will adhere to the following donor criteria to govern the recognition and determine the total calculated gift value by donors. This policy allows for a clear set of rules to determine the total calculated gift value by a donor to qualify based on the accumulation of their total number of gifts over their giving period.
 - 2) Donations have been tracked electronically since 2004 using MBEF’s donor software, Blackbaud’s Raiser’s Edge. All donations prior to 2004 were tracked on paper in donor recognition annual reports and honor rolls.
 - 3) Donor criteria is a combination of the following gifts:
 - (a) Cash Donations
 - (1) Annual Appeal
 - (2) MBEF Endowment
 - (3) Community Partner Program (including former Business Sponsor and Real Estate programs)
 - (4) Manhattan Wine Auction Event
 - (a) Paddle Raise
 - (b) Table Sponsorships
 - (i) Must be \$5,000+ in single gift
 - (5) Golf Classic Event
 - (a) Must be \$5,000+ in single gift
 - (b) In-Kind Donations
 - (1) Manhattan Wine Auction
 - (a) Value of wine donations in excess of \$5,000+ in value for the given year. Value of wine donation approved by MBEF in conjunction with Wine Procurement Chair, Manhattan Wine Auction.
 - (b) Value of auction donations, live and silent, in excess of \$5,000+ in value for the given year. Value of donation approved by MBEF in conjunction with Auction Chair, Manhattan Wine Auction.

- B) Recognition Levels
 - 1) Qualified donors will be assigned to the four recognition levels:
 - (a) \$1 Million
 - (b) \$500,000
 - (c) \$250,000
 - (d) \$100,000
 - 2) The project has been designed in a manner to allow for donors to be added or move from lower recognition levels to higher levels as their total calculated gift value warrants.
- C) Friends of MBEF
 - 1) The following organizations or individuals will also be recognized as part of the project:
 - (a) MBEF Board Presidents
 - (b) MBEF Endowment Presidents
 - (c) The City of Manhattan Beach
 - (d) Manhattan Beach School PTA's
 - (e) The Manhattan Beach Unified School District
 - (f) Manhattan Beach Country Club/Bay Club
 - 2) As part of the commissioned art piece, a separate area has been designed to recognize these individuals and any future individuals.

3) PROCEDURE

- A) MBEF will apply the donation criteria to determine the number of donors who qualify at the four recognition levels for the initial installation.
- B) MBEF will inform all donors who qualify to be recognized on the project of their recognition level based on their total calculated gift and will verify the recognition name and spelling in writing.
 - 1) Recognition Name
 - (a) The Board has adopted a standard format for recognizing the respective donors based on how they have been recognized in MBEF's Annual Report & Honor Roll.
 - (1) Individual
 - (a) First and Last Name
 - (i) Example: Beth Dickenson
 - (2) Married Couple
 - (a) Example: Amy and Stuart Williams
 - (b) Married Couple (different last name) - Wife's First and Last name and Husband's First and Last Name
 - (i) Example: Susan Smith and Bob Mitchell
 - (3) Corporate Name - name of company only
 - (a) Example: SKECHERS
 - 2) Donors can opt out of being recognized on the project.
 - C) Annual Review
 - 1) Each year, at the conclusion of MBEF's fiscal year on June 30th, MBEF will update the total calculated gift of all MBEF donors based on the donation criteria to determine:
 - (a) If any of the current donors recognized on the project qualify for a higher recognition level.
 - (b) If there are new donors at the \$100,000 or higher level for the first time.
 - D) Update of Donor Name Plate for Installation
 - 1) MBEF will work with the artist or designated business to create:
 - (a) Donor name plates for new donors for their initial installation
 - (b) Donor name plates for current project donors whose new calculated gift value warrants their recognition at a higher recognition level.
 - 2) MBEF will contract designated business to install in the available open spaces the new Donor Name Plate's before September of each calendar year.

- 3) The MBEF and MBEF EF Boards acknowledge that a project maintenance/installation budget must be approved on a yearly basis to maintain the visual appearance of the project, as well the installation of new donor name plates.