

## CUMULATIVE GIFT RECOGNITION

When a question comes up whether or not to provide donors recognition for their cumulative giving over the years, opinions and perspectives vary. Aside from reliability of the organization's data based system, subsequent discussion seldom focuses on the consequence of a decision.

The following "case" examples are intended to prompt discussion among an organization's leadership to ensure that decisions made serve the best interests of the organization.

**Aggregate Gift Recognition:** Amy Alpha has given \$150,000 over the past 15 years. Based on her cumulative giving, Betty would be entitled to be recognized at the \$150,000 gift level, and all her subsequent gifts would entitle her to be recognized at increased levels of donor recognition.

- 1. Would Betty's cumulative giving include both her unrestricted and restricted gifts? Would it include gifts to a previous capital campaign as well as her annual fund gifts?*
- 2. Could Betty include her intended will bequest, which she has confirmed in writing? At the indicated "face value" of the bequest, or the "present current"/actuarial value?*
- 3. How would you respond to Betty's request that she would like to establish a "family recognition" for aggregate giving to the organization from herself, her deceased husband, and her three daughters each of whom benefited from the organization?"*

**Motivating Giving:** Laura Beta is informed that over the past 5 years she has made a total of \$525,000 in 37 gifts to the organization.

- 1. How do you think Laura might respond to a request to consider a pledge over the next 5 years of \$475,000 which would enable the organization to recognize her at the \$1 million aggregate gift level?*
- 2. Do you feel that Laura, or perhaps other donors who have significantly supported the organization over the years might be surprised to know the amount of their aggregate gifts?*