



ROOSEVELT FOR GENERATIONS CAMPAIGN POLICIES

The following campaign policies have been approved by the Campaign Cabinet on _____, 2021 and the TRHS Foundation Board of Directors on _____, 2021

1. Campaign commitments may include cash, pledges, grants, marketable securities, matured bequests and gifts in-kind.
2. Gifts will be credited solely for support of the Roosevelt for Generations Capital Campaign. Campaign gifts cannot be applied toward other non-campaign projects.
3. The Roosevelt for Generations Capital Campaign will allow donors to fulfill pledge commitments within a 3-year period. Exceptions/extensions will be considered upon written request to the Campaign Cabinet or Foundation Board.
4. A cash gift, signed pledge form, letter of intent or letter of award must be in the possession of the TRHS Foundation before a campaign donation is official and recognized.
5. Gifts which do not indicate a restricted use within the priorities of the campaign will be allocated to *unrestricted* campaign funds.
6. If a gift is received by another organization and then forwarded to the Campaign, it will be receipted for tax purposes from the forwarding organization. The original donor may be recognized, although not receipted, for a donation to the campaign.
7. All gifts to the Roosevelt for Generations Capital Campaign will be recognized, celebrated and publicized by donor name and gift range unless otherwise instructed by the donor. Requests for donor anonymity will be honored.
8. A list of gift opportunities, gift levels, and types of donor recognition will be developed. Campaign gifts of \$250,000 and above qualify for a naming opportunity. Those giving the largest gifts will be given first opportunities for naming.
9. Gifts of securities will be valued at the average of the high and low selling price on the date the gift was received by the Foundation on behalf of the Campaign. Losses or gains realized by the sale of securities after their receipt, brokerage fees and/or other expenses associated with the asset shall not affect the value of the gift as recorded on day received.
10. The Roosevelt for Generations Capital Campaign will comply with all state and federal laws and regulations as they relate to charitable gifts.
11. The Roosevelt for Generations Capital Campaign policies, as approved, can be modified only by a majority vote of the Campaign Cabinet and TRHS Foundation Board.