Fundraising Policy and Procedures

Introduction
Beck Center for the Arts (hereafter referred to as Beck Center) is a non-profit, 501 (c)(3) organization that provides top quality professional theatrical productions and comprehensive, curriculum-based arts education programs enriching the quality of life for Northeast Ohioans.

Beck Center’s mission is:

*To educate and entertain through diverse high-quality arts education and performance.*

Beck Center is grateful to be the beneficiary of financial support resulting from the generous gifts made by individuals, corporations, foundations, organizations, events, and government sources. All donations solicited on behalf of Beck Center shall be used to further this mission and follow the policies and procedures outlined below.

Fundraising Policy
Beck Center adheres to the Association of Fundraising Professionals (AFP) Code of Ethics and the AFP Donor Bill of Rights (Appendix A) in addition to the guidelines below. Beck Center abides by the Generally Accepted Accounting Principles (GAAP) when accounting for all funds including those obtained through philanthropic means.

Any individual requesting funds on behalf of Beck Center will do so in a respectful manner that does not impose any pressure or discomfort on the person or entity being solicited. If the request is made in writing the individual must gain approval from their immediate supervisor and the President and CEO to confirm that the message and means are an appropriate method of soliciting that individual or group. If the solicitor chooses to communicate via phone or in person that meeting and the content of the conversation to be had should be approved by the individual’s supervisor.

If the individual being asked declines the opportunity to give, the solicitor should respect the decision while also thanking them for their support and continued interest in Beck Center’s mission.

Any gift received by Beck Center will be counted toward the Annual Fund unless otherwise stated by the donor in writing. In the case that a donor chooses to place
restrictions on their contribution or give to a specific fund or program, those
designations will be honored and the finance department will be notified. If Beck Center
is unable to accommodate the donor’s request a representative will contact the donor to
discuss alternative designations for the contribution. Any individual interested in
creating an endowment fund must gain approval from the President and CEO in order
to first, determine that the fund and its purpose are in line with the mission of Beck
Center; and second, ensure that Beck Center has the capacity to manage that fund.

As a result of the complex nature of a “planned gift” or bequest any individual
choosing to leave part of their estate to Beck Center they will be encouraged to seek his
or her own outside legal and tax advice before its execution. Individuals who have
included Beck Center in their estate plans will be included in the Legacy Society
(Appendix B).

Beck Center will make every effort to maintain the wishes of any donor indicating that
they chose to give their gift anonymously. In such an instance the donor’s listing will be
adjusted in the database to indicate such and the individual will be listed in any printed
materials made available to the public as ‘Anonymous’.

As a 501 (c)(3) all donations to Beck Center are tax deductible to the fullest extent of the
law. If the donor receives anything in exchange for their contribution, such as a dinner
or tickets to a performance, the tax receipt shall clearly state what portion of the
donation is tax deductible. Written tax receipts shall be issued for all donations from
the development department in a timely fashion. However, donors are encouraged to
review their donations and deductions with a tax consultant or financial advisor.

Pledges
When a donor makes a pledge it will be recorded in Donor Perfect noting the pledge
amount, date, payment schedule, and purpose. If the pledge is not fulfilled after 6
months a reminder notice will be mailed to the donor. Three months later, if the pledge
is still outstanding, another reminder will be sent to the donor. After 12 months, if the
pledge is still not fulfilled, a call will be made to the donor. If payment still does not
occur the pledge will be written off.

If the donor indicates that they will make payments on a set schedule and later misses
payments for two months in a row a notice will be mailed to the donor. If payment still
fails to come through after three more months another letter will be sent and then
followed up with a phone call. The balance will be written off if there is still no response
from the donor.

Board Members will be asked to make a pledge to Beck Center’s Annual Fund at the
beginning of each fiscal year. If a Board Member indicates a payment schedule on the
form it will be noted in DonorPerfect. If payments are missed for two consecutive
months then the Board Member will be contacted. If it was indicated that fulfillment of
the pledge will occur in one payment and that payment has not occurred within two
months of the fiscal year end, a reminder notice will be sent.

**Fundraising Event Policy**

Beck Center regularly plans events to raise funds and to broaden our base of donors,
partners, and contacts; in addition to bringing greater awareness to the organization’s
mission. These events will only go forward if it is clear that they will not result in a
financial loss for Beck Center. Items donated for events will be considered in-kind gifts
unless a cash donation is made. Events benefitting Beck Center may take place off Beck
Center property in collaboration with the host and a Beck Center representative, with
approval from the President and CEO.

All ticket sales and donations will be handled by Beck Center’s Development Office or
Box Office unless otherwise agreed upon by the Director of Development.

**Donor Confidentiality Policy**

In recognition of its obligation to respect and protect the privacy of its donors, Beck
Center pledges to handle information about donations with respect and confidentiality.
Donors will be informed of Beck Center’s mission and the way we intend to use
contributed resources. Contributions to Beck Center will be used for the purposes for
which they are given.

**Your Personal Information**

Beck Center may collect personal information such as names, company names, titles,
addresses, telephone numbers, fax numbers, e-mail addresses, and payment
information from donors. By submitting personal information to Beck Center, the donor
acknowledges that he or she has read this privacy policy, understands it, agrees to its
terms and authorizes Beck Center to collect, use and disclose personal information
pursuant to the terms of this policy.

**How We Use It**

Beck Center uses personal information collected from donors to respond to donor
inquiries, to issue donation receipts, to help in deciding who receives future fundraising
appeals, to help organize fundraising events, and to inform donors of new programs
and services. Donor information is also used to determine the appropriate level of
recognition for each donor listed in playbills and other print material as well as
invitations to events.

**Who We Share It With**

Beck Center will never sell donor information to third parties. Beck Center does, from
time to time, share the names and mailing addresses of its donors for one time use with
other worthwhile organizations, as determined by the President and CEO. Beck Center
will never, share telephone numbers, e-mail addresses, or any financial information collected from donors. Any donor that does not want their information shared may call the Development Office at 216.521.2540 x19 or send an email to hjohnson@beckcenter.org. They may also write to Development Office, Beck Center, 17801 Detroit Avenue, Lakewood, OH 44107.

Your Right to Limit Contact By Beck Center
You may request not to be contacted by Beck Center in connection with any of its programs, updates, or fundraising appeals. Requests not to be contacted by Beck Center can be sent in writing to Development Office, Beck Center, 17801 Detroit Avenue, Lakewood, OH 44107; or via email to hjohnson@beckcenter.org or by calling 216.521.2540 x19. To unsubscribe from email communications you may click the link at the bottom of any email sent or use the contact information above.

Donor Listing
Beck Center will make every effort to list your name in donor listings in the format you prefer. If you would like you change your current listing or make your donation anonymously, please inform us by writing to Development Office, Beck Center, 17801 Detroit Avenue, Lakewood, OH 44107; or by sending an email to hjohnson@beckcenter.org or by calling 216.521.2540 x19.

Disclaimer
Notwithstanding other provisions of this privacy policy, Beck Center may disclose personal information in special cases when we find it necessary to identify, contact, or bring legal action against someone who may be violating this agreement or may be causing injury to or interference with Beck Center, its constituents, or anyone else that could be harmed by such activities. Beck Center reserves the right to disclose any information to law enforcement or other parties that Beck Center, in its sole discretion, believes is required or appropriate in order to comply with the law.

Contact Us
Beck Center’s Donor Privacy Policy may be changed or updated from time to time. If you have any questions about our Donor Privacy Policy, you can contact us at Development Office, Beck Center, 17801 Detroit Avenue, Lakewood, OH 44107; or by sending an email to hjohnson@beckcenter.org or by calling 216.521.2540 x19.

Acknowledging Donations
We strive to acknowledge every contribution with a letter signed by the President and CEO or designee identified by the President and CEO within 48 hours of receipt. Individuals donating $1.00-$5.00 will receive an electronic acknowledgement from the Stewardship Manager. Paper copies of the acknowledgment letters for gifts over $250 will be stored in development files for up to seven (7) years and an electronic version of all other gifts will be kept on network storage for up to seven years as well.
In appreciation for their support donors will receive certain benefits (Appendix C). Among these benefits donors may receive recognition online and in the playbill, invitation to special events, etc.

All donors giving $100 or more in a 12 month period will be listed in the theater playbills and education catalogs under the appropriate recognition level alphabetically by last name. If the listing contains the last names of two individuals then the record will be sorted by the first last name in the record.
Appendix A

AFP Donor Bill of Rights
# A Donor Bill of Rights

*Philanthropy* is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

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<td>To be informed of the organization’s mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.</td>
<td>To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.</td>
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<th>II.</th>
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<td>To be informed of the identity of those serving on the organization’s governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.</td>
<td>To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.</td>
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<td>To have access to the organization’s most recent financial statements.</td>
<td>To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.</td>
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<td>To be assured their gifts will be used for the purposes for which they were given.</td>
<td>To have the opportunity, for their names to be deleted from mailing lists that an organization may intend to share.</td>
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<td>To receive appropriate acknowledgement and recognition.</td>
<td>To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.</td>
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**Developed By**

- Association of Fundraising Professionals (AFP)
- Association for Healthcare Philanthropy (AHP)
- Council for Advancement and Support of Education (CASE)
- Giving Institute, Leading Consultants in Non-Profits

**Endorsed By**

- [In formation]
- Independent Sector
- National Catholic Development Conference (NCDC)
- National Committee on Planned Giving (NCPG)
- Council for Resource Development (CRD)
- United Way of America
Appendix B

Legacy Society
Legacy Society
The Legacy Society is a group of individuals who have included Beck Center in their will. An individual becomes a member of the Legacy Society by contacting the Development Office and indicating that they have thought of Beck Center during their estate planning. As such, they are flagged in DonorPerfect, recognized in the playbill and invited to attend the annual Legacy Luncheon.

An individual from whom Beck Center receives a bequest, but did not contact the Development Office during their lifetime, will also be marked in DonorPerfect as a member of the Legacy Society. If appropriate, a family member will be invited to the Legacy Society luncheon on their behalf.
Appendix C

Donor Recognition Program
Thank you for your generous gift! Your tax-deductible contribution supports our mission to educate and entertain through diverse high quality arts education and performance.

**Cameo Role**  $50
- Subscription to ArtsLine, Beck Center’s e-newsletter

**Supporting Player**  $100
All Cameo Role level benefits, plus:
- Listing in Theater Playbill and online

**Director’s Circle**  $250
All Supporting Player level benefits, plus:
- Advance notice of the theater season

**President’s Circle**  $500
All Director’s Circle benefits, plus:
- Invitation to special event hosted by Beck Center President

**Chairman’s Circle**  $1,000
All President’s Circle benefits, plus:
- Invitation to annual reception hosted by the Chair of the Board of Directors

**Benefactor’s Circle**  $2,500
All Chairman’s Circle benefits, plus:
- Two complimentary tickets to any play in the season

For more information, please contact Sally Weakley, Director of Development, at 216-521-2540, x18.

5/04/2011