**SAINT LOUIS ZOO**

**ADDENDUM: CAMPAIGN GIFT ACCEPTANCE POLICIES**

**Introduction**

The *Better Wild, Better World*Campaign with a fundraising goal of $160 million was officially authorized by the Saint Louis Zoo Commission and Association in 2021 to fund priorities identified in the Saint Louis Zoo’s (Zoo) 2020 Strategic Plan, including:

|  |  |  |
| --- | --- | --- |
| **Case Elements** | **Allocation** | **Fundraising Goal** |
| 1. Bringing the Saint Louis Zoo WildCare Park (WildCare Park) to life | Capital improvements | $140 million |
| 1. Reimagining exhibits and spaces at the Zoo, including but not limited to Destination Discovery |
| 1. Bolstering the Endowment | Endowment | $20 million |
|  | | **$160 million** |

**Gift Acceptance**

These policies are an addendum to the Zoo’s standing Gift Acceptance Policies (updated in Fall 2023) and aim to instruct what types of gifts are accepted and counted toward the *Better Wild, Better World* Campaign. All standard gift acceptance policies will apply to gifts received for the Campaign unless otherwise noted.

The Saint Louis Zoo’s Gift Acceptance Committee (Gift Acceptance Committee) may allow for special exceptions for gift acceptance on a case-by-case basis. The Gift Acceptance Committee includes the Vice President of Philanthropy and Director of Development, in consultation with the Dana Brown President & CEO*,* *Better Wild, Better World* Campaign Co-Chairs and all appropriate Zoo Development directors.

**Campaign Period**

The Campaign period runs from 2020 through 2027 with the right to be extended before December 31, 2027, via an approval vote by the Saint Louis Zoo Association (the Association), in cooperation with the St. Louis Zoological Park Subdistrict Commission (the Commission).

**Gift Counting and Reporting**

All **outright gifts and pledges** designated toward campaign priorities during the campaign period will be counted toward the fundraising goal. **Bequests or other deferred gifts realized or received** during the campaign period will also be counted, unless all or part of the gift was counted and reported previously; in that case, the remainder will be counted.

**Planned gift intentions** will be reported in addition to the Campaign’s goal of $160 million.

* Planned gift intentions documented during the campaign period will be counted and credited at face value if the donor is 65 or older by December 31, 2027 (or the end date of campaign period).
* If the planned gift intention should encompass two lives, the youngest of the two donors must meet the age minimum of 65.
* Life income gifts such as charitable gift annuities will not be counted as campaign gifts nor included in campaign reporting.

**Gift Allocations**

* Capital improvements: All outright gifts and pledges will be directed toward capital improvements and projects at WildCare Park and the Zoo, unless otherwise designated.
* Endowment: All planned gift intentions, realized planned gifts or designated outright gifts (cash or pledges) will be directed to the Endowment.

**Gift Documentation**

Proper documentation, such as a pledge form, or intention form or gift agreement, is required to count, report, and recognize gifts. The Gift Acceptance Committee may, on rare occasions, make an exception to the requirement of written documentation to count a gift or pledge.

The value of pending (gift requested with a decision from the donor pending) and verbal (orally shared by the donor without formal documentation) gifts will not be included in publicly announced Campaign totals; they may be used in projected totals for use among Zoo staff and volunteer leadership (e.g., Campaign Cabinet, the Commission, and the Association). As mentioned in the gift documentation section above, the Gift Acceptance Committee, may on rare occasions, make an exception to the requirement of written documentation to count or report a gift.

**Gift Recognition**

The Zoo’s staff will identify donor gift recognition opportunities, subject to approval by the Vice President of Philanthropy and Director of Development.

Recognition for **outright gifts and pledges** may include:

* Selection of on-site recognition as available at their philanthropic gift level or a named endowed fund as appropriate.
* Inclusion in the Campaign honor roll published in print materials and on a “campaign donor wall” or similar recognition area on site when/if installed.

Recognition of **planned gift intentions** may include:

* Inclusion in the Campaign honor roll published in print materials and on a “campaign donor wall” or similar recognition area on site when/if installed.

Recognition of **combined outright and planned gifts** may include:

* Selection of on-site recognition at the level of a donor’s combined outright gift, pledge and/or deferred gift as outlined below.
* Inclusion in the Campaign honor roll and Campaign wall at the level of their combined outright and planned gift intention.

A deferred gift may accompany an outright cash gift or pledge of approximately 50% or more of the stated donor gift recognition to ensure that capital funds are available for building and programming needs. (For example, a $3,000,000 gift recognition could be achieved with a $1,500,000 face value planned gift intention (ideally irrevocable) and an outright cash or pledged gift of $1,500,000). Rare or specialty cases outside normal bounds are at the approval of the Gift Acceptance Committee.

Recognition signage may be removed in the event a gift is not paid and written off.

All recognition is designed to conform to the established property standards and to be complementary to the landscaping, architecture or building of the selected donor gift recognition. Recognition lasts for the useful life of the exhibit, space, or program, or substantial renovation or replacement, unless otherwise specified in a pledge form, intention form or gift agreement. If an individual, corporation or foundation wishes to change the name or names on said recognition after it is installed, it will be at their expense.

In the event the Gift Acceptance Committee determines that the actions or conduct of an honoree of a recognized gift are contrary to the values of the Zoo, it may remove that person's name from the exhibit, space, or program.

*To note: This policy may be updated throughout the Campaign period. Terms defined throughout this document were established in alignment with the Guidelines for Reporting and Counting Charitable Gifts from the National Association of Charitable Gift Planners.*