DEVELOPMENT DIVISION

POLICY MANUAL

Updated FY19

Centenary College of Louisiana

Development Division

Policy and Procedures Manual

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1.1 College Mission

Centenary College of Louisiana (“Centenary” or the “College”) is a selective liberal arts college offering undergraduate programs and a limited number of graduate programs in the arts, humanities, natural sciences, and social sciences, which strengthen the foundation for students’ personal lives and career goals. Students and faculty work together to build a community focused on ethical and intellectual development, respect and concern for human and spiritual values, and the joy of creativity and discovery.

Consistent with its affiliation with the United Methodist Church, Centenary encourages a lifelong dedication not only to learning but also to serving others. It strives to overcome ignorance and intolerance; to examine ideas critically; to provide an understanding of the forces that have influenced the past, drive the present, and shape the future; and to cultivate integrity, intellectual and moral courage, responsibility, fairness, and compassion.

In pursuit of these ideals, Centenary challenges its students throughout their education to write and speak clearly; to read, listen, and think critically; to comprehend, interpret, and synthesize ideas; to analyze information qualitatively and quantitatively; to appreciate the diversity of human cultures; to respect the value of artistic expression; and to recognize the importance of a healthy mind and body and the interdependence of people and the environment.

Academic and co-curricular programs, as well as the example of those who teach and work at Centenary, support students in their development and encourage them to become leaders in the work place, the community, the nation, and the world at large.

1.2 Development Division Mission

The Development Division seeks to bolster Centenary's strength and sustainability through the maintenance of relationships between the College and the larger community. Such relationships lie at the heart of Centenary's ability to pursue its educational and service-oriented purpose.

1.3 Vice President for Development

The Vice President for Development reports directly to the President and works closely with the four other members of the Cabinet: President, Provost/Dean of the College, Vice President for Finance and Administration, and the Vice President for Enrollment. The Vice President for Development is responsible for providing leadership and management for the Development Division. The Vice President for Development supervises and directs work of the professional staff and the Directors in the Development Division. Also, the Vice President for Development supports the President and others in all matters related to fundraising, assists in the planning of special events, and supports the activities and development of external support groups.

1.4 Development Division Mission

The overall mission of the Development Division is to support the mission of the College by identifying, cultivating, and securing resources to enhance and improve educational opportunities for students and professional opportunities for faculty and staff while serving the extended community.

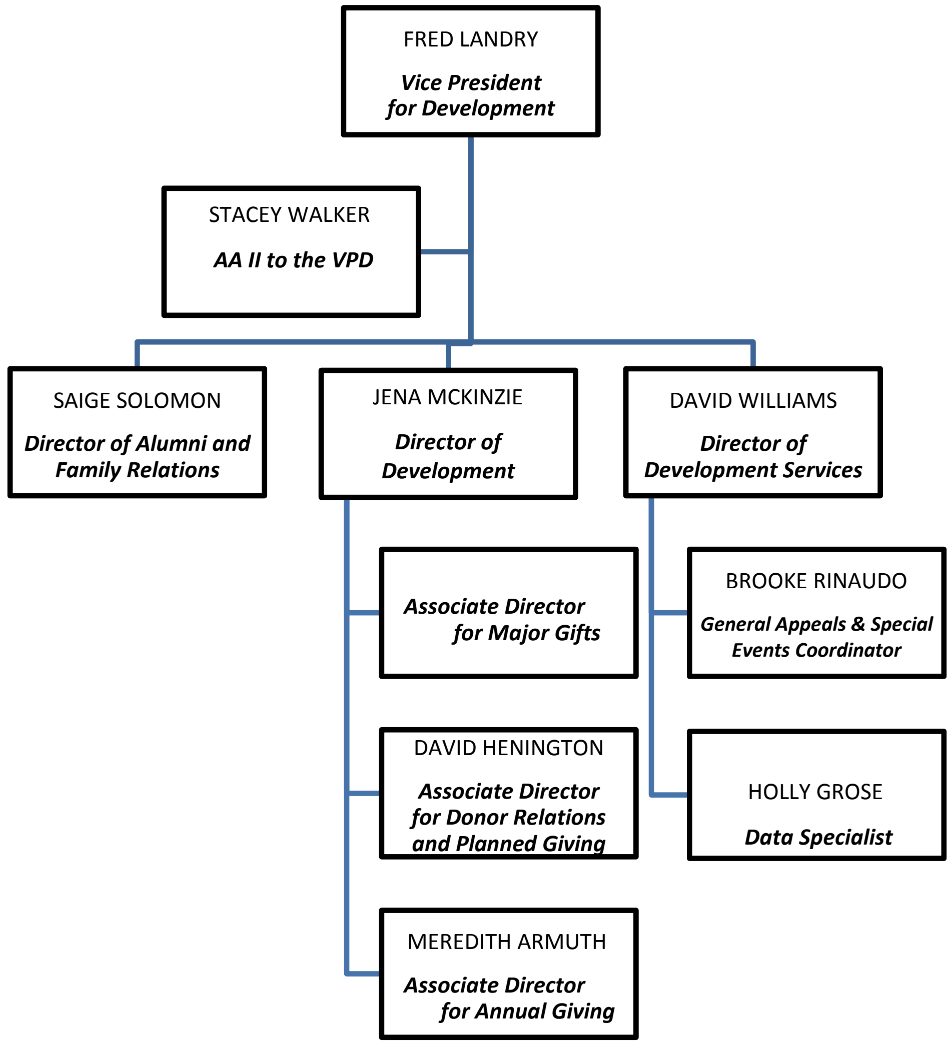
The purposes of the Development Division are (a) to create awareness within the public and private sectors of the financial needs of Centenary and (b) implement plans by which these financial needs can be met through gift support.

To fulfill these purposes, it shall be the responsibility of the Development Division to institute an organized program for obtaining gift support from alumni, friends, faculty and staff, corporations, organizations, and private foundations for annual, capital, and endowment support.

The Development Division is also responsible for: (a) the Annual Fund (GTS – Great Teachers and Scholars Fund); (b) gifts processing; and (c) prospect research.

The Development Division is composed of the Office of Alumni & Family Relations, Office of Development, Office of Development Services, and the Office of the Vice President for Development.

1.5 FY19 DEVELOPMENT ORG CHART



Updated 8/2/18

2.0 Responsibilities within the Development Division

2.0 Responsibilities within Development Division

The Development Division is one of six central divisions of the College whose primary purpose is to enhance the private support of the College through identification, cultivation, stewardship, and outreach to donors, potential donors, alumni, foundations, corporations, and the public. The Development Division includes the Vice President for Development's office, the Office of Development, Office of Alumni & Family Relations, and Office of Development Services.

2.1 Vice President's Office

The Vice President for Development's Office ("Vice President's Office") has the primary responsibility for developing, implementing, and oversight of fundraising activities and direct resources for the Development Division.

2.2 Office of Development

The Office of Development's responsibilities include maintaining the strong relationships the College builds with its alumni, family, friends, and donors, and to identify and secure needed resources to assure Centenary's continued success as a premier liberal arts college. Our philanthropic efforts focus primarily on generating support for the GTS. Ultimately, the efforts of the Development team help ensure all students who qualify to attend Centenary are afforded the opportunity to benefit from the Centenary Experience through the generosity of all who love and support the College.

2.2.1 Gift Officers

The Gift Officers in the Office of Development are an integral part of the College's team and participate in identification, cultivation, solicitation, and stewardship of donors and other activities as necessary. The Gift Officers are responsible for raising external support from all appropriate constituencies for their assigned areas of responsibility, as well as for the central College events and activities.

Gift Officers' duties, as assigned, include but are not limited to

A. identifying prospective individuals, foundations, corporations, and other organizations;
B. seeking funding to fulfill college and individual goals;
C. drafting Call Reports for all face-to-face meetings and Contact Reports for all other communications with current and prospective donors, Trustees, and alumni; ensuring entry of these reports into the existing computer records system; ensuring delivery of a copy of these reports to central files (and to foundation and scholarship files, as is necessary) and the Vice President for Development;
D. weekly communication of Development-related activities performed during that time period to the Vice President for Development and other Directors;
E. drafting gift acknowledgement/thank-you letters to donors assigned to them (e.g., prospects whom they manage);
F. planning and implementing volunteer and cultivation activities;
G. coordinating activities with other members of the Development team and other college divisions;
H. maintaining and promoting the annual Honor Roll of Donors;
I. traveling, as appropriate;
J. backing up all data and files stored on computers used in their offices;
K. securing gifts from friends, alumni, faculty, and staff made through estate plans, trust & insurance policies; and
L. other activities as required by the Vice President for Development.

2.3 Alumni & Family Relations

Alumni & Family Relations is responsible for creating and providing services and programming to general alumni, as well as identifying, cultivating, and securing gift support from alumni. Alumni Relations includes Alumni Programs.

Alumni Programs is responsible for (a) developing, managing, and coordinating various special events such as parties and receptions locally and out of town, homecoming and reunion activities, and send-off parties and (b) cultivating various volunteer constituencies such as the National Alumni Association Board, alumni chapters, homecoming and reunion committees, and alumni mentors/speakers for the purpose of connecting alumni with each other and the College.

2.4 The Office of Development Services

The Office of Development Services is responsible for researching and managing information regarding current and prospective donors. Development Services will gather such information from sources including electronic databases, the Internet, hard copy references, prospects' places of employment, government recorders' offices, courts, and other public agencies.

Development Services’ duties, as assigned, include, but are not limited to

A. researching and compiling profiles on individuals, corporations, and foundations as requested by Gift Officers and the Vice President of Development; providing on-going research of print and electronic publications regarding news related to prospective donors (“Prospects”) and information of general interest to the Development Division; distributing such research as is necessary;
B. identifying new “leads” through print and electronic media and database searching;
C. maintaining a Prospect List for prospect cultivation and solicitation; distribute said list to Director of Development and the Vice President for Development;
D. facilitating input of Call Reports and Contact Reports into the existing computer records system and central files;
E. maintaining the master computerized records system containing constituencies of alumni, current and former parents, donor and prospect corporations and foundations, individual (non-alumni) prospects and donors, current and former (retired or emeritus) faculty, and current and former (retired and emeritus) staff;
F. maintaining accurate and current gift histories on all donors;
G. striving to improve accuracy of all records data through the use of returned mail, commercial electronic services, and tracer cards;
H. providing reports of records data, including, but not limited to, quarterly reports regarding delinquent pledges (those pledges that are behind in payments or have passed their final payment’s due date) that are sent to gift officers that manage those delinquent donors;
I. producing mailing lists in-house for all development mailings;
J. formatting address files for mail merges;
K. consulting and analyzing data for information storage and retrieval;
L. training users on existing computer records system for data entry and the production of reports; and
M. assisting members of the Development Division with all group email disseminations.

2.5 Position Descriptions

2.5.1 Office of the Vice President for Development

Centenary

VICE PRESIDENT FOR DEVELOPMENT

Division:	**Development**
Department:	**Office of the Vice President for Development**
Reports To:	**President of the College**
FLSA Status:	**Exempt – Fulltime**
Employee Class:	**Executive**
Schedule Variation:	**12 months of year**
Benefits Eligibility:	**Full Benefits**
Prepared By:	**Department of Human Resources**
Revised Date:	**April 2016**

SUMMARY

The Vice President provides executive level direction and guidance to the administrative division of Development. The Vice President exercises management and administrative direction over the College's revenue generation through the College's fundraising to include planning, development, implementation, and enforcement of Development-related policies and procedures.

ESSENTIAL FUNCTIONS

- Formulates current and long range plans, forecasts, and analyses for presentation to the President, Cabinet, and Board of Trustees; provides assistance and advice to the President and Cabinet on fundraising and external relationships.
- Is responsible for all college revenue generation through Fundraising.
- Represents the college and the president to external audiences.
- Acts as primary liaison to appropriate committees of the Board of Trustees as directed by the President.
- Supports the President in management of relationships with the Board of Trustees.
- Ensures the effective administration of annual operating budgets.
- Serves as a member of the President's Cabinet.
- Plans and consults with administrative personnel to ensure compliance with established procedures and directives as well as with accreditation standards.
- Develops and implements strategies to ensure proper identification, cultivation, solicitation, and stewardship of major gift prospects capable of making annual gifts of $50,000 or more per year.
- Personally manages a portfolio of 75 prospects (individuals, churches, corporations, foundations or governmental agencies or other granting entities) 25 of whom are managed on behalf of the president, capable of contributing $50,000 or more per year.
- Facilitates the President's timely, efficient and effective engagement in fundraising activities for the College.
- Develops an integrated and prioritized set of fundraising goals and initiatives and communicate fundraising priorities throughout the organization.
- Actively participates in the solicitation and stewardship of gifts and grants.

- Represents Centenary College at events, to volunteer groups, and in the community with the goal of increasing the visibility of the College.
- Exercises strategic and operational oversight for the Development Division to meet the College's goals.
- Leads in planning, coordinating and implementing programs that optimize support of the College, including the creation and oversight of programs in the following areas:

  - Alumni Relations
  - Development
  - Development Services

- Utilizes mobile computing beyond the confines of the office for the purpose of being accessible and resourceful while traveling.
- Accessible and reachable by telephone or text message at times other than College business hours for the purpose of meeting any needs that the Development Division or College may have.
- Performs other related projects, duties, and responsibilities as deemed necessary.

SUPERVISORY RESPONSIBILITIES

Director of Development, Director of Development Services, Director of Alumni and Family Relations and Administrative Assistant II.

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

MINIMUM

- Terminal degree and 5 years of related experience or advanced degree and ten 10 years of related experience or bachelor’s degree and 15 years of related experience.
- Demonstrated entrepreneurial leadership.
- Must be adaptable to performing under levels of stress, imposed by frequent deadlines, changing priorities, peak workloads, or public/student contact.
- Must be a people-oriented individual, have good communication skills, and possess the ability to work with a diverse group of people.
- Experience with Excel, Word, Access, and PowerPoint.
- Demonstrated facility with best practices in higher education fundraising, enrollment management, and administration.
- Must be available for night and weekend hours as needed. Travel is a necessity and is estimated at 30% or greater for this position.

PREFERRED

- Master’s degree in a related field.
- Experience at a selective, residential, Liberal Arts College.

Please send cover letter and resume to:

Department of Human Resources
Centenary College of Louisiana
2911 Centenary Boulevard
Shreveport, Louisiana 71104
Email: hr@centenary.edu
Fax: 318-841-7366

Candidates are invited to visit the College's website at www.centenary.edu/jobs.

Centenary recognizes that diversity is essential to its goal of providing an educational environment where students explore the unfamiliar, invent new approaches to understanding, and connect their work and lives to the world at large. We thus welcome applicants who would add to the College's diversity of ideas, beliefs, experiences, and cultural backgrounds. EOE.

Centenary

ADMINISTRATIVE ASSISTANT II TO THE VICE PRESIDENT FOR DEVELOPMENT

Division: Development
Department: Office of Development
Reports to: Vice President for Development
FLSA Status: Non Exempt – Fulltime
Schedule Variation: 12 months of year – 40 regular scheduled hours per week
Benefits Eligibility: Full Benefits
Prepared By: Department of Human Resources
Revised Date: May 2018

SUMMARY

Performs administrative/clerical duties including but not limited to arranging and scheduling appointments, assisting in the preparation of reports and maintenance of records, and coordination of special meetings and events in support of the Vice President for Development (VPD); administrative/clerical/programmatic support for the Development Division as needed.

ESSENTIAL FUNCTIONS

- Schedules appointments, meetings and travel arrangements for the VPD.
- Opens, sorts and distributes incoming correspondence, faxes, and emails for the VPD.
- At the direction of the VPD, assists with mailings and emails to College constituencies.
- Prepares, composes and proofreads correspondence, proposals, invoices, reports, memos and letters using word processing, spreadsheet, database, or presentation software.
- Greets visitors, answers the telephone, takes messages and replies to questions in accordance with general instructions.
- Maintains Development division records and provides necessary documentation and reporting.
- Reviews/maintains division budgets by recording division invoices and expense reports and reports to the VPD as needed on issues that may arise.
- Manages VPD's expense reports and verifies credit card statements.
- Assists with Development and Presidential events.
- Enters donors' gifts into a log using Access. This includes gifts by check and by credit card.
- Records minutes for weekly Department meetings.
- Other related projects, duties and responsibilities may be assigned as deemed necessary by the VPD.

SUPERVISORY RESPONSIBILITIES

Student Workers

QUALIFICATIONS

To perform this job successfully, an individuals must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required.

MINIMUM

- Bachelor's degree.
- Two years of office experience.
- Must be a people-oriented individual, have good communication skills and the ability to work with a diverse group of people.
- Well organized and self-motivated.
- Computer skills should include word processing, spreadsheets, email, social media and database applications.
- Must be able to fulfill job requirements in a high-energy, high-traffic area.
- Must be available for overtime as assigned and approved by immediate supervisor.

PREFERRED

- Educational and/or work experience at a selective, residential, Liberal Arts College.
- Related admission/recruitment experience.
- Experience with Excel and Access.
- Experience with Banner and/or Radius.
- Experience with a selective, residential, Liberal Arts college.

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Centenary College of Louisiana is a selective, residential, national liberal arts college affiliated with the United Methodist Church. Founded in 1825, it is the oldest chartered liberal arts college west of the Mississippi river and is a member of the Associated Colleges of the South.

2.5.2 Office of Development

Centenary

DIRECTOR OF DEVELOPMENT

Division:	**Development**
Department:	**Development**
Reports To:	**Vice President for Development**
FLSA Status:	**Exempt – Fulltime**
Schedule Variation:	**12 months of year - 40 regular scheduled hours per week**
Benefits Eligibility:	**Full Benefits**
Date Revised:	**June 2018**
Available:	**July 2018**

SUMMARY

The Director of Development oversees the fundraising and stewardship efforts of the College under the supervision of the Vice President for Development. The Director monitors, directs and is accountable for the solicitation activities of Development personnel that have fundraising responsibilities.

ESSENTIAL FUNCTIONS

- Directs and administers an annual giving program that includes identification, cultivation, and solicitation of prospects and annually increases both the number of donors and annual gift totals, with special attention to budget-relieving gifts
- Meets regularly with Development solicitors and holds them accountable for setting and exceeding goals for personal solicitations and fundraising results.
- Responsible for meeting operational, endowment and capital budget giving requirements.
- Develops and implements strategies to ensure proper identification, cultivation, solicitation, and stewardship of major gift prospects capable of making gifts of $5,000 or more per year.
- Personally manages a portfolio of 100 major gift prospects (including individuals, churches, foundations, corporation, governmental agencies and other grant-making entities) with the potential of making gifts of $5,000 or more per year.
- Analyzes giving trends in order to make course corrections and achieve fundraising goals during the fiscal year, as well as in setting annual goals and objectives.
- Prepares written and oral presentations and proposals as needed and provides staff support to the College President, Vice President for Development, and volunteer leadership engaged in major gifts activity.
- Provides support to the planned giving program.

- Plans and directs events to increase involvement of prospective major gifts donors, including dinners, trips, and campus visits.
- Develops and monitors the Development program budget.
- Provides requested reports to the Vice President for Development in a timely manner.
- Directly assists, in conjunction with the Vice President for Development, the Council of Visitors program.

OTHER DUTIES AND RESPONSIBILITIES

- Participates in College events and functions and serves on Development and College committees as required.
- Performs other duties as assigned by the Vice President for Development.
- Utilizes mobile computing beyond the confines of the office for the purpose of retrieving donor information, submitting call reports and engaging in correspondence with the office or donors while traveling.
- Accessible and reachable by telephone or text message at times other than College business hours for the purpose of staying in touch with the office or donors while traveling.

SUPERVISORY RESPONSIBILITIES

Associate Director for Annual Giving, Associate Director for Donor Relations and Planned Giving,

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

MINIMUM

- Bachelor's degree and 5 years of related experience or advanced degree and 3 years of related experience.
- Must be available for night and weekend hours as needed. Travel a necessity and is estimated at 50% or greater for this position.
- Strong organizational and interpersonal skills as well as an ability to manage multiple projects concurrently.
- Strong verbal and written communication skills and the ability to establish priorities, set objectives, and achieve stated goals.
- Must have computer skills that include word processing, spreadsheets, email, and database applications.

PREFERRED

- 5 years demonstrated successful fundraising experience through personal gift solicitation or comparable experience in a related field.
- Experience at a selective, residential, Liberal Arts College.

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Centenary

ASSOCIATE DIRECTOR FOR MAJOR GIFTS

Division:	**Development**
Department:	**Development**
Reports To:	**Director of Development**
FLSA Status:	**Exempt – Fulltime**
Schedule Variation:	**12 months of year - 40 regular scheduled hours per week**
Benefits Eligibility:	**Full Benefits**
Approved Date:	**June 2016**

SUMMARY

The Associate Director for Major Gifts identifies, cultivates, solicits and stewards alumni, parents, and friends capable of making major gifts to support the operations of the College. He/she will also personally develop a portfolio of prospects capable of major annual, endowment, and capital gifts. This position entails significant interaction with potential high-level donors. Travel is required. He/she is responsible for developing and implementing an effective plan to secure ongoing unrestricted funding support for Centenary College.

ESSENTIAL FUNCTIONS

- Assists in the planning and execution of a comprehensive Great Teachers and Scholars Fund giving program.
- Identifies individuals capable of making major unrestricted gifts.
- Develops effective cultivation strategies, performs direct solicitations independently or in tandem with volunteers or other gift officers.
- Develops and implements strategies to ensure proper identification, cultivation, solicitation, and stewardship of major gift prospects capable of making annual gifts of $5,000 or more per year.
- Personally manages a portfolio of 150 prospects.
- Makes personal calls to donors on a consistent basis to ensure a growing base of support for major as well as planned gifts.

OTHER DUTIES AND RESPONSIBILITIES

- Assists the Development Division with special projects and programs.
- Represents the College at a variety of community events to promote Development programs.
- Performs other related duties as assigned.
- Utilizes mobile computing beyond the confines of the office for the purpose of retrieving donor information, submitting call reports and engaging in correspondence with the office or donors while traveling.

- Accessible and reachable by telephone or text message at times other than College business hours for the purpose of staying in touch with the office or donors while traveling.

SUPERVISORY RESPONSIBILITIES

Student interns

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

MINIMUM

- Bachelor's degree and 5 years of related experience or advanced degree and 3 years of related experience.
- Strong organizational and interpersonal skills as well as an ability to manage multiple projects concurrently.
- Strong verbal and written communication skills and the ability to establish priorities, set objectives, and achieve stated goals.
- Must have computer skills that include word processing, spreadsheets, email, and database applications
- Must be available for night and weekend hours as needed. Travel a necessity and is estimated at 75% or greater for this position.

PREFERRED

- Five years demonstrated successful fundraising experience through personal gift solicitation or comparable experience in a related field
- Experience in a selective, residential, Liberal Arts college

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Centenary

ASSOCIATE DIRECTOR FOR ANNUAL GIVING

Division:	**Development**
Department:	**Development**
Reports To:	**Director of Development**
FLSA Status:	**Exempt – Fulltime**
Schedule Variation:	**12 months of year - 40 regular scheduled hours per week**
Benefits Eligibility:	**Full Benefits Eligibility**
Prepared By:	**Department of Human Resources**
Approved Date:	**December 2016**

SUMMARY

The Associate Director for Annual Giving builds deeper relationships with existing donors. The Associate Director for Annual Giving develops and implements strategies to ensure proper identification, cultivation, solicitation, and stewardship of endowed fund donors who are prospects capable of making additional gifts. Collaborating with the Director of Development and the Vice President for Development, the Associate Director for Annual Giving will develop effective cultivation strategies and perform direct solicitation independently or in tandem with volunteers or other gift officers.

ESSENTIAL FUNCTIONS

- Solicit donors who have existing endowed funds, estate commitments or other qualities that are prospects for additional or major gifts. Review unmanaged donors at President's Circle giving levels to determine their gift capacity and make recommendations to the Director of Development for possible prospect management.
- Maintains a portfolio of 150 prospects for annual, major, and endowed gifts.
- Serves as the Development Department liaison for the Center for Family Owned Business.
- Serves as the liaison to athletics for project-based initiatives.
- Serves as the Development Department liaison to the Convocations Committee.
- Assists Director of Development in creating, implementing, and monitoring Stewardship Plan.
- Represents the College at community events.
- Serves as Liaison to the Women’s Endowment Quorum.
- Utilizes mobile computing beyond the confines of the office for the purpose of being accessible and resourceful while traveling.
- Accessible and reachable by telephone or text message at times other than College business hours for the purpose of staying in touch with the office or donors while traveling.
- Other related projects, duties and responsibilities may be assigned as deemed necessary.

SUPERVISORY RESPONSIBILITIES

None.

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

MINIMUM

- Bachelor's Degree plus three years experience.
- Ability to establish priorities, set objectives, and achieve stated goals.
- Experience working with customers or clients with a wide range of differing needs and high expectations who can be demanding of individual attention.
- Must have computer skills that include word processing, spreadsheets, email, and database applications.
- Must be available for night and weekend hours as needed. Travel a necessity and is estimated at 40% or greater for this position.
- Fundraising experience through personal gift solicitation or comparable experience.
- Strong organizational and interpersonal skills as well as an ability to manage multiple projects concurrently.
- Strong verbal and written communication skills.

PREFERRED

- Master's Degree.
- Educational and/or work experience at a selective, private, residential liberal arts college.

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Centenary

ASSOCIATE DIRECTOR OF DONOR RELATIONS AND PLANNED GIVING

Division: Development
Department: Development
Reports To: Director of Development
FLSA Status: Exempt – Fulltime
Schedule Variation: 12 months of year - 40 regular scheduled hours per week
Benefits Eligibility: Full Benefits
Approved Date: June 2016

JOB SUMMARY

The Associate Director of Donor Relations and Planned Giving provides stewardship for the College's largest donors and solicits deferred gifts.

ESSENTIAL FUNCTIONS

- Personally manages a portfolio of 75 prospects/donors capable of making deferred gifts to the college of $25,000 or more. In addition to planned giving, these prospects will also be solicited for annual gifts of $1,000 or more.
- Responsible for actively providing appropriate recognition and stewardship for members of the Paul Brown Society.
- Accountable for increasing the membership for the Paul Brown Society by 5-10% per year.
- Provides ongoing effective and celebratory stewardship for endowment donors and their heirs.
- Utilizes gift planning software, prepares gift illustrations for donors or their advisors.
- Educates prospects, donors, and their advisors on estate planning best practices in one-on-one or group settings.
- Prepares charitable gift annuity contracts.
- Builds relationships with allied professionals and firms that serve Shreveport to equip them with general knowledge of the College.
- Supports the production of planned giving mailings by providing specific input regarding the content of planned giving direct mail pieces and the manner in which topics are presented to various constituent groups.
- Educates Development staff members by providing continuing education on planned giving.
- Utilizes mobile computing beyond the confines of the office for the purpose of being accessible and resourceful while traveling.
- Accessible and reachable by telephone or text message at times other than College business hours for the purpose of staying in touch with the office or donors while traveling.
- Other related projects, duties, and responsibilities may be assigned as necessary.

SUPERVISORY RESPONSIBILITIES

None.

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

MINIMUM

- A bachelor's degree and 3 years of related experience.
- Must be a people-oriented individual, have good communication skills, and the ability to work with a diverse group of people.
- Technical knowledge of planned giving.
- Strong organizational and interpersonal skills, as well as an ability to manage multiple projects concurrently.
- Must have computer skills that include word processing, spreadsheets, email, and database applications.
- Must be available for night and weekend hours as needed. Travel a necessity and is estimated at 75% or greater for this position.

PREFERRED

- Formal education in tax law or financial planning.
- Successful fundraising experience in personal gift solicitation.
- Familiarity with planned giving practices.
- Experience at a selective, residential, Liberal Arts College.

Please send cover letter and resume to:

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Centenary College of Louisiana
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Shreveport, Louisiana 71104
Email: hr@centenary.edu
Fax: 318-841-7366

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Centenary

DIRECTOR OF ALUMNI AND FAMILY RELATIONS

Division:	**Development**
Department:	**Alumni and Family Relations**
Reports To:	**Vice President for Development**
FLSA Status:	**Exempt – Fulltime**
Schedule Variation:	**12 months of year - 40 regular scheduled hours per week**
Benefits Eligibility:	**Full Benefits**
Prepared By:	**Department of Human Resources**
Approved Date:	**June 2016**

JOB SUMMARY

The Director of Alumni and Family Relations develops and maintains relationships with alumni and the families of current students for the purpose of conducting alumni special events and programs, engaging alumni and families in the life of the College, and connecting alumni to current students. The Director cultivates various volunteer constituencies, such as the national alumni council, alumni chapters, homecoming volunteers, and event and reunion hosts.

ESSENTIAL FUNCTIONS

- Manages the alumni association, its leadership Council, its geographic and affinity chapters and the benefits that are provided to its membership.
- Works with the Office of Career Services to plan events and implement programs that connect alumni with students for the purposes of career networking, mentoring, and potential internship or employment opportunities.
- Plans and implements Homecoming/Parents & Family Weekend each year which includes, but is not limited to working with reunion groups based on affinity networks and class years as well as honoring alumni & friends annually at an Alumni Awards Banquet included in the weekend.
- Works with affinity groups to engage them in the life of the College.
- Works with the Office of Admission to maintain an active Legacy program, to engage alumni and parents in the recruitment of new students and to encourage alumni to refer qualified applicants to Centenary.
- Works with the Department of Marketing and Communication to inform and recognize alumni on a regular basis.
- Maintains the alumni and parent relations websites to ensure all information is current and relevant.

- Works with the Department of Marketing and Communication to maintain and nurture an online presence.
- Develops, manages, and coordinates various special events such as parties, dinners, and receptions both locally and out-of-town.
- Develops, coordinates, and implements parent & family programming associated with SOAR (Summer Orientation and Registration) and Orientation.
- Works with the Office of Development Services to ensure alumni records are kept up-to-date
- Represents Centenary in the community and other volunteer capacities in order to further build and maintain meaningful relationships with alumni and parents.
- Utilizes mobile computing beyond the confines of the office for the purpose of being accessible and resourceful while traveling to alumni or donor events.
- Reachable by telephone or text message at times other than College business hours for the purpose of meeting any needs the Development Office, Alumni, Donors or the College may have.

SUPERVISORY RESPONSIBILITIES

- Student Worker(s)
- Academic Student Intern(s)
- Volunteer(s)

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

MINIMUM

- Bachelor's degree and 5 years of related experience or advanced degree and 3 years of related experience.
- Computer skills should include word processing, spreadsheets, email, and database applications.
- Must be people-oriented individual, have good communication skills, and the ability to work with a diverse group of people.
- Well organized and self-motivated.
- Must be able to fulfill job requirements in a high-energy, high-traffic area.
- Must be able to travel for out-of-town events. Travel is estimated at 25% or greater for this position.

PREFERRED

- Experience with Banner and Access.
- Bachelor's degree earned at Centenary College of Louisiana.
- Educational and/or work experience at a selective, private, residential liberal arts college.

Please send cover letter and resume to:

Department of Human Resources
Centenary College of Louisiana
2911 Centenary Boulevard
Shreveport, Louisiana 71104
Email: hr@centenary.edu
Fax: 318-841-7366

Candidates are invited to visit the College's website at www.centenary.edu/jobs.

Centenary recognizes that diversity is essential to its goal of providing an educational environment where students explore the unfamiliar, invent new approaches to understanding, and connect their work and lives to the world at large. We thus welcome applicants who would add to the College's diversity of ideas, beliefs, experiences, and cultural backgrounds. EOE.

2.5.4 Office of Development Services

Centenary

DIRECTOR OF DEVELOPMENT SERVICES

Division: **Development**
Department: **Development Services**
Reports To: **Vice President for Development**
FLSA Status: **Exempt – Fulltime**
Schedule Variation: **12 months of year – 40 regular scheduled hours per week**
Benefits Eligibility: **Full Benefits**
Approved Date: **June 2016**

SUMMARY

The Director of Development Services is primarily responsible for the oversight of donor records and the production of research regarding the capacity of donors to make gifts to Centenary College. The Director also manages the Data Specialist who maintains the Development Division's component of the Banner data System and the General Appeals and Special Events Coordinator.

ESSENTIAL FUNCTIONS

- Utilizes a variety of reference materials, on-line and other sources including state and federal agency reporting to obtain information about Donor and Prospect capacity and inclination to make charitable gifts which benefit Centenary College.
- Organizes and provides analyses of collected information, including development officers contact reporting and periodic peer and electronic screening, regarding donors' and prospects' areas of interest.
- Provides briefing documents for the President and Vice President for Development in advance of development calls.
- Maintains a set of profiles on major donors, prospects and Trustees.
- Identifies funding sources including local and regional foundations and builds strategies for seeking gifts.
- Oversees the moves management system and progress of all solicitors relative to their projected and individual strategy plan of action.
- Oversees all gift logging, gift posting and gift reporting.
- Directs the prospect management system and develops prospect and donor leads.
- Manages prospect pipeline to enhance solicitors' portfolios and solicitation efforts.
- Assists the Development Division with special projects and programs.
- Represents the College at a variety of community events to promote development programs.
- Oversees general solicitations in support of all development efforts.
- Oversees special events coordination in support of all development efforts.
- Performs other related duties as assigned.

SUPERVISORY RESPONSIBILITIES

Data Specialist and General Appeals and Special Events Coordinator

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

MINIMUM

- Bachelor's degree and 5 years of related experience or advanced degree and 3 years of related experience.
- Strong organizational and interpersonal skills as well as an ability to manage multiple projects concurrently.
- Strong verbal and written communication skills and the ability to establish priorities, set objectives, and achieve stated goals.
- Must have computer skills that include word processing, spreadsheets, email, and database applications.

PREFERRED

- Experience with a selective, residential, Liberal Arts college.

Please send cover letter and resume to:

Department of Human Resources
Centenary College of Louisiana
2911 Centenary Boulevard
Shreveport, Louisiana 71104
Email: hr@centenary.edu
Fax: 318-841-7366

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Centenary

GENERAL APPEALS AND SPECIAL EVENTS COORDINATOR

Division:	**Development**
Department:	**Development Services**
Reports To:	**Director of Development Services**
FLSA Status:	**Exempt – Fulltime**
Schedule Variation:	**12 months of year – 40 regular scheduled hours per week**
Benefits Eligibility:	**Full Benefits**
Prepared By:	**Department of Human Resources**
Approved Date:	**June 2016**

SUMMARY

Under the supervision of the Director of Development Services, plans and coordinates general solicitations and special events directly in support of the Development Divisions strategic goals and objectives.

ESSENTIAL FUNCTIONS

- Creates a general appeals calendar for each fiscal year.
- Works with the Director of Development Services, the Vice President for Development and other Development Officers to create general mass appeals to accomplish the fundraising goals for the College.
- Employs a graduated gift society system to increase the size of gifts from individual donors from year to year.
- Responsible and accountable for increasing the number of donors in each gift society according to goals set by the Vice President for Development and the Director of Development Services.
- Works to broaden the base of support and develop routine and passive modes for donors to give on an annual basis such as electronic funds transfer and recurring credit card gifts.
- Strategically times annual solicitations according to individual donors giving habits to increase the retention rate.
- Responsible and accountable for renewing unmanaged LYBUNTs and reactivating SYBUNTs according to goals set by the Director of Development Services and the Vice President for Development.
- Reports to contacts of endowed funds for scholarships, professorships, chairs, building maintenance and operations, and awards utilizing letters and reports.
- Plans and implements donor recognition program, the President's Circle, to include events, annual solicitations, methods to measure effectiveness, and recognition items.
- Plans and implements annual recognition events for endowed fund contacts, including the Legacy Luncheon.
- Develops and manages the College's giving network program to include direct solicitation, reporting, and stewardship.

- Plans and implements day of giving strategies to include developing a communication plan, on campus activities, solicitation, and stewardship reporting.
- Works closely with the Development Writer and other members of Marketing and Communication in developing the media and text for general appeals.
- Plans and executes special events in support of specific fundraising & presidential objectives including stewardship and cultivation, such as the Fall Reception for Trustees, presidential holiday parties, and the annual Legacy Luncheon and Leadership Banquet.
- Works closely with Marketing and Communications to produce invitations in advance of events.
- Assists the Development Division with special projects and programs.
- Oversees the implementation of direct mail and email appeals that utilize an effective segmentation strategy.
- Other related projects, duties and responsibilities may be assigned as deemed necessary.

SUPERVISORY RESPONSIBILITIES

None.

QUALIFICATIONS

MINIMUM

- Bachelor's degree.
- Strong organizational and interpersonal skills as well as an ability to manage multiple projects concurrently.
- Strong verbal and written communication skills and the ability to establish priorities, set objectives, and achieve stated goals in a timely fashion.
- Must be people-oriented individual, have good communication skills, and the ability to work with a diverse group of people.
- Must have computer skills that include word processing, spreadsheets, email, and database applications.
- Ability to quantitatively analyze data and results.
- Ability to think creatively.
- Must be able to fulfill job requirements in a high-energy, high-traffic area.

PREFERRED

- Experience working with Banner and Access.
- Educational and/or work experience at a selective, private, residential liberal arts college.

Please send cover letter and resume to:
Department of Human Resources
Centenary College of Louisiana
2911 Centenary Boulevard
Shreveport, Louisiana 71104
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Centenary

DATA SPECIALIST

Division: **Development**
Department: **Development Services**
Reports To: **Director of Development Services**
FLSA Status: **Non-Exempt – Full time**
Schedule Variation: **12 months of year - 40 regular scheduled hours per week**
Benefits Eligibility: **Full Benefits**
Prepared By: **Department of Human Resources**
Approved Date: **June 2016**
Revised: **February 2018**

JOB SUMMARY

The Data Specialist is primarily responsible for the integrity and maintenance of donor records, prospect management, and gift processing for the Development Division.

ESSENTIAL FUNCTIONS

- Performs data entry in prospect management system including prospect contact reports.
- Updates biographical data for donors, alumni and prospects as needed specifically to ensure accuracy of gift processing management and related reports.
- Provides reports from database of donor and prospect biographical and gift details as requested.
- Processes gifts and pledge payments, including credit card transactions, cash and checks, matching gift applications, stock transfers and gifts in-kind.
- Performs data entry of pledges.
- Ensures accuracy of gift data and makes recommendations to other staff as needed for compliance with College policies and procedures, as well as other applicable industry best practices and regulations such as matching gift application requirements, CASE best practices, and IRS charitable gift requirements
- Assists with donor data audits, including reconciliation of gift records regularly as required by Finance Department, auditors, or internal staff.
- Maintains and provides as needed the electronic documentation of gift and pledge back-up and acknowledgements
- Performs data entry as needed in the Development module of the Banner database system. This includes data integrity, reports, gift and demographic data entry, and prospect management codes.
- Supports prospect management data entry and projects as directed.
- Assists the Development Division with special projects and programs
- Performs other related duties as assigned.

SUPERVISORY RESPONSIBILITIES

None.

QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

MINIMUM

- Minimum of one year of successful experience in donor relations or customer care.
- Strong organizational and interpersonal skills as well as an ability to manage multiple projects concurrently.
- Must be people-oriented individual, have good communication skills, and the ability to work with a diverse group of people.
- Strong verbal and written communication skills and the ability to establish priorities, set objectives, and achieve stated goals in a timely fashion.
- Must have computer skills that include word processing, spreadsheets, email, and database applications.
- Ability to quantitatively analyze data and results.
- Must be able to fulfill job requirements in a high-energy, high-traffic area.

PREFERRED

- Bachelor's Degree preferred
- Experience with Banner and Access.
- Educational and/or work experience at a selective, private, residential liberal arts college.

Please send cover letter and resume to:

Department of Human Resources
Centenary College of Louisiana
2911 Centenary Boulevard
Shreveport, Louisiana 71104
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3.0 Development Division Policies and Procedures

3.1 Fundraising Activities Policy

Fundraising Activities Policy

POLICY

All solicitations for charitable gifts must be conducted or coordinated through Centenary's Development Division. Charitable donations to the College and all of its related campus organizations and departments must be made in the name of Centenary College and be received by and receipted through the Office of Development Services.

(BoT 10/15/15)

FUNDRAISING GUIDELINES AT CENTENARY COLLEGE

The Great Teachers and Scholars Fund

- A well-coordinated and professionally administered annual fund program is an essential component to meet the needs of the annual budget of the College and keep tuition costs affordable for students and competitive with other cohort institutions. The Great Teachers and Scholars Fund, the budget-relieving program of annual giving, will be the primary focus of fundraising efforts at Centenary College.

- Through an active calendar of diverse and creative appeals and solicitations, the Development Division seeks to build and maintain relationships with friends and alumni of the College and communicate to them the importance of support through consistent annual gifts to the Centenary Fund.

Partnership Support: The Development Division and Campus Organizations

- Occasions exist for the Development Division to partner and promote fundraising objectives of campus organizations that support budget-relieving gifts for the College or project-based fundraising, as approved by the Cabinet, which focuses on specific needs beyond what the budget affords. The Development Division, by means of targeted and direct appeals, is eager to work with such campus-related organizations and provide the extensive resources and skills of their office to help ensure a successful fundraising effort.

- The Development Division will provide these organizations with quality promotional pieces (where budget allows); sound, professional advice; and guidance regarding successful fundraising strategies and initiatives. The Development Division will work diligently with these organizations to help ensure success. Furthermore, Development Services will offer these groups access to the latest database updates to ensure reliable address/contact information for the identified fund raising activity.

PROCEDURES

1) All solicitations for charitable gifts must be conducted or coordinated through Centenary's Development Division. Charitable donations to the College and all of its related campus

organizations and departments must be made in the name of Centenary College and be received by and receipted through Development Services.

2) Centenary College uses a variety of appeals and solicitations throughout the fiscal year in providing broad-based, budget-relieving funds for the institution and opportunities for project-based fundraising. As such, all fund raising activities or initiatives must fall into one of the two following categories:

   A. Annual Appeals

      Annual appeals are general appeals focused on specific constituent groups such as alumni, parents, faculty/staff, friends, etc. These general appeals are designed to have the greatest possible impact on the current budget and to remain consistent from year to year in order to increase participation along with familiarity and ownership of the issue. Annual appeals can also be used to help underwrite groups/programs/organizations through a charitable gift to the College. Comprehensive annual appeals originate and are coordinated through the Development Division.

   B. Project-Based Appeals

      The Cabinet will approve in advance all project-based appeals which focus primarily on specific needs beyond which the annual budget affords. Project-based appeals may be operational or capital in nature and may also be classified as a special event or non-recurring activity.

      Project-based appeals must have a specific amount/goal to meet the expectations of the project. If funds are raised in excess of this goal, 25% of the overage will be used to support College operations, with the balance remaining to be put towards the next approved project initiated by said group or organization.

      Any project-based fundraising done outside of these proscribed guidelines through the support of third parties, e.g., non-affiliated 501 (c) 3 organizations will not be allowed to use Centenary images, logos, names, or images of buildings associated with the College, without permission from Centenary.

3) Project-based appeals are classified as one of the two following solicitation types:

   A. Targeted Appeals

      Targeted appeals are solicitations on behalf of the College of a limited constituent base selected for their likely affinity to the proposed project. The Development Division has the capacity to organize and produce a limited number of these type appeals each year. Groups/programs wishing to send such an appeal must submit a request through the appropriate vice president and, following approval of the cabinet, the appeal will be placed on the fundraising agenda for the College at the discretion of the Vice President for Development.

B. Direct Appeals

Individuals/groups/programs may, from time to time, wish to appeal to one individual or organization that they think would fund a project or program of interest to the College. With the endorsement of the vice president related to that individual/group/program, and following approval by the cabinet, the appeal will be placed on the fundraising agenda at the discretion of the Vice President for Development. The Development Division will offer limited assistance in preparing such a proposal. If the individual/group/program has a potential donor in mind, the Development Division will determine if that donor is likely to be interested in such a project and whether or not this particular proposed appeal complements or detracts from any relationship(s) already in place. In the cases in which no donor has been identified, the Development Division, time permitting, will conduct cursory and limited research to provide a list of potential donors.

Once the individual/group/program has submitted a request that is approved by the cabinet, the Development Division will review and prepare it for submission to the potential donor and/or develop a strategy to increase the likelihood of a positive response.

3.1.1 Request to Conduct Fundraising Activity Form

Request to Conduct Fundraising Activity Form

Request to Conduct Fundraising Activity

In order to identify the several and various fundraising needs within the College community and to coordinate fundraising efforts campus-wide, this form must be completed and submitted to the Development Division through the Vice President whose programmatic responsibilities most closely align with the nature of the project. This request must be approved and the activity added to the College's fundraising agenda prior to conducting any fundraising event or other fundraising activity such as direct or indirect solicitations by mail, electronically, in person, or through publications. All proposed printed and/or distributed materials must be reviewed by and receive prior written approval from the Development Division before use.

Steps for Submitting Requests

1. Please indicate whether the funds requested will be for the capital budget, endowment, or project-based.
2. Please indicate whether this request is being submitted for current or future budget year(s) or both. Also indicate if it will have long-term budget implications.
3. Please read carefully the descriptions of different appeals on the back of this sheet and select the one you think most aptly describes the fundraising activity you wish to undertake.
4. If you will need assistance with the creation and/or design of printed materials for the event, please submit a Graphic Support Form at least eight weeks prior. All proposed printed and/or distributed materials must be reviewed and receive written approval from the Vice President for Development before use.
5. Please use the attached form to create a brief narrative that addresses the following (as applicable):
    A. A description of the project requiring funding.
    B. Rationale for support.
    C. A proposed project/program budget.
    D. A description of the proposed fundraising effort.
    E. A list of proposed donors, categories of individuals or groups you feel would be motivated to support this project/program with charitable gifts.
    F. Timeline for the fundraising activity to take place.
    G. Will donor(s) receive any kind of gift(s) or service(s) in exchange for contribution? If so, please note the nature and financial value of the gift.

PROJECT NARRATIVE

Project description.

Rationale for support.

Proposed project/program budget.

Description of the proposed fundraising effort.

Proposed donors, categories of individuals or groups you feel would be motivated to support this project/program with charitable gifts.

Timeline for the fundraising activity to take place.

Will donor(s) receive any kind of gift(s) or service(s) in exchange for contribution? If so, please note the nature and financial value of the gift.

APPEAL TYPE – Check One

□ **Targeted Appeal.** Targeted appeals are solicitations on behalf of the College of a limited constituent base selected for their likely affinity to the proposed project. The Development Division has the capacity to organize and produce a limited number of these type appeals each year.

□ **Direct Appeal.** Individuals/groups/programs may, from time to time, wish to appeal to one individual or organization that they think would fund a project or program of interest to the College. With the endorsement of the vice president related to that individual/group/program, and following approval by the cabinet, the appeal will be placed on the fundraising agenda at the discretion of the Vice President for Development. The Development Division will offer limited assistance in preparing such a proposal. If the individual/group/program has a potential donor in mind, the Development Division will determine if that donor is likely to be interested in such a project and whether or not this particular proposed appeal complements or detracts from any relationship(s) already in place. In the cases in which no donor has been identified, the Development Division, time permitting, will conduct cursory and limited research to provide a list of potential donors.

Once the individual/group/program has submitted a request that is approved by the cabinet, the Development Division will review and prepare it for submission to the potential donor and/or develop a strategy to increase the likelihood of a positive response.

Please complete and sign this form and submit to the appropriate Vice President for endorsement to the Development Division.

Project/Program Name_____________________________________ Dept. ________________________

Submitted by: ____Title_________________________

_______Current Budget Year ______ Future Budget Year(s) ______Both Current and Future

_______Operations ______Endowment ______Capital _____ Project-Based

____ ________________________________

Signature of Vice President Department

Approval

President____ **Date** ______________

VP for Development ____ **Date** _____________

3.2. Gift Acceptance Policy

Gift Acceptance Policy

1) *Unrestricted Gifts*
   A. All gifts of any size received by the College without donor restrictions shall be accepted immediately as outright gifts to the College. They will be used to underwrite the current budget of the College and shall be recorded by the Office of Development Services accordingly.
   B. It shall be a post-gift, asset-allocation decision on the part of the Controller, Vice President for Finance and Administration, the President and/or the Board of Trustees to re-allocate any or all of the assets resulting from the unrestricted gift for unbudgeted capital needs or for endowment purposes. The allocation decision, however, will not affect Development Services' recording of the gift as an unrestricted gift for current budget support.
2) *Restricted Gifts*
   A. All gifts restricted by donors for specific purposes will be accepted and used to underwrite the annual operating budget of the College and will be recorded upon receipt as unrestricted gifts to the College to the extent that expending the operating budget as planned in the current year would satisfy the restriction on the asset made by the donor.
   B. During the first fiscal year in which a gift is accepted with a restriction not as described in 2.A. above, but able to be satisfied within the fiscal year, the gift shall be recorded as a current restricted gift but not regarded as supportive of the annual operating budget. In subsequent fiscal years, gifts with that same restriction shall be recorded as restricted gifts in support of a *de facto* budget item whether or not that item has been properly anticipated. (See 3 for guidance on making decisions to accept gifts.)
3) *Decision to Accept Restricted Gifts (other than gifts of real estate)*
   A. From time to time, the College will receive gifts restricted by the donor for specific purposes (including non-liquid assets) which have not been anticipated in the College's budget (including the capital portion of the operating budget) or to endow an ongoing expense not currently anticipated in the College's budget. Before accepting such a gift, the Development solicitor or Office of Development Services will seek written verification from the Cabinet member whose division is most likely to need or utilize such funding or from the President that
      i. the gift can be used for or in support of educational purposes,
      ii. the gift is sufficient to cover the entire cost of the expense it creates, and
      iii. the operating budget is sufficient to sustain any ongoing or future costs created as a result of accepting the gift.
   B. When questions arise as to whether or not an offered gift (especially a non-liquid asset other than real estate) can be used for educational purposes or when there is concern that the liabilities associated with receiving, owning, managing, administering or liquidating a gift asset may outweigh any benefit to the College, the President or Vice President for Development may convene a *Gift Committee* to determine whether or not to accept the gift. The committee shall consist of
      i. the President,
      ii. the Vice President for Finance and Administration,
      iii. the Vice President for Development, and
      iv. any Trustee or senior administrators the convener deems necessary.
4) *Gifts of Real Estate*

A. The College may, from time to time, receive gifts of real estate to use for programmatic purposes or as assets to be liquidated to support the purposes of the College. Before such gifts are considered, the donor shall, at his or her expense, provide the College with the following:
   i. a specific legal description of the property,
   ii. a survey of the environmental condition of the property conducted by a qualified professional, and
   iii. a qualified appraisal of the value of the property.
B. When the qualifications of 4.A. above have been met, the President or Vice President for Development shall convene a *Real Estate Gift Committee* to determine whether or not to accept the gift. The committee shall consist of
   i. the Vice President for Finance and Administration,
   ii. the Vice President for Development,
   iii. a quorum of the Board of Trustees Financial Integrity Committee, and
   iv. any other Trustees or Senior Administrators the convener deems necessary.

3.3 Naming Opportunities Policy

Naming Opportunities Policy

The College will honor donors and/or their designees from time to time by ascribing to an endowment fund; an annually supported scholarship; award or program; or physical spaces, places, or objects a name of the donor's choosing when he/she contributes toward the purpose, project, or cause a minimum amount as specified in the Naming Opportunities Policy.

In order to pay tribute in perpetuity to generous donors or those whom donors wish to honor or memorialize, Centenary College has made available several opportunities to establish named funds or facilities. Each of these naming opportunities vitally supports the Centenary College mission and can only begin to show the school's appreciation for all that philanthropy makes possible.

Named Faculty Support Funds

Distinguished Chair: Minimum gift of $2 million to fully support a position for a faculty member who has contributed significantly to academia or a particular field of study over the course of his or her career.

Endowed Chair: Minimum gift of $1 million for partial support of a position for a faculty member who demonstrates excellent teaching and research.

Endowed Professorship: Partial support of a faculty position at a minimum gift level of $500,000.

Endowed Lectureships: Minimum gift of $100,000 to provide support for annual lectures by visiting faculty and other scholars.

Faculty and Staff Support Fund: Minimum gift of $100,000 to provide support for the salaries and professional development of the members of the faculty and staff.

Named Academic Support Funds

Named School: Minimum gift of $10 million.

Named Academic Division: Minimum gift of $5 million.

Named Academic Department: Minimum of $2.5 million.

Division Support Fund: Minimum gift of $1 million.

Department Support Fund: Minimum of $500,000.

Program Support Fund: Minimum gift of $250,000.

Scholarships and Grants

Named 1825 Scholars Award: Awarded annually to a superior student, requiring a minimum gift to endowment of $500,000

Named Academic Merit Scholarship: Awarded annually to a highly qualified student based on academic merit, requiring a minimum gift to endowment of $250,000, or a minimum annual gift in the amount equivalent to half of tuition for one student.

Named Centenary Award: Awarded annually to a student based on academic credentials and co-curricular activities, requiring a minimum gift to the endowment of $100,000, or a minimum annual gift in the amount equivalent to 20% of tuition for one student.

Named Performance Award: Awarded annually to a student who exhibits exceptional artistic talent in the performing arts. Requires a minimum gift to endowment of $50,000 or a minimum annual gift equivalent to 10% of tuition for one student.

Named Centenary Grant: Grant-in-aid based on need awarded administratively to students who qualify under federal guidelines, requiring a minimum gift to endowment of $25,000 or a minimum annual gift of $1,000.

Labor Omni Vincit Scholarship: These annual scholarships are established at the $15,000 level and can be named by the donor; donors making a four-year commitment ($60,000) can add preferences such as an academic interest or geographic origin of the student. *Labor Omnia Vincit* Scholarship donors directly support a specific student at Centenary and follow that student's Centenary career through letters, the annual Legacy Luncheon, and other opportunities.

Scholarship Funding Policies

Gifts to endowment of $25,000 or more may be made in the form of pledges paid over a period of time up to five years.

Annual scholarship award gifts must be pledged by February 1 and paid by August 1 prior to the academic year in which the award is made.

For the awarding schedule of endowed scholarships, please refer to the Endowment Funds Policy.

Named Support Funds and Awards

Library Media Fund: Minimum gift to endowment of $25,000 to purchase books, periodicals, electronic resources or other materials for the library collection.

Information Technology Fund: Minimum gift of $25,000 to endowment to provide students, faculty and staff with ongoing access to electronic information and communication systems.

Award Fund: Minimum gift to endowment of $10,000 to provide a cash award in recognition of the service or achievements of a member of the student body, faculty, or staff.

Named Buildings, Wings, or Major Renovations and Campaign Naming Opportunities

1) Minimum gift of fifty-one percent of the project cost.
   A. During a campaign, comprehensive or capital, a list of naming opportunities may be developed specific to that campaign.
   B. On an ongoing basis, there are various rooms, green spaces and facilities that may be named. A specific list of established naming opportunities may be developed for presentation to donors.
   C. The Vice President for Development is responsible for reviewing all names proposed for campus buildings (existing and planned), any portion thereof, outdoor facilities, schools and programs.
   D. The Provost and the Vice President for Finance and Administration should also be consulted regarding naming buildings and academic programs.
   E. The completed review shall be forwarded to the President – the person delegated by the Board of Trustees to have authority for final approval.
   F. This policy assumes 50% paid and 100% pledged prior to any new construction.
   G. This policy assumes that the project cost of new construction includes an endowment equivalent to 25% of the construction costs.

3.4 In-Kind Gifts Policy

In-Kind Gifts Policy

The College may accept gifts in-kind in accordance with I.R.S. regulations with proper documentation that the gift will support the mission of the College.

Procedure

1. When offered an in-kind gift, the College may choose to use, sell or decline the gift. When evaluating the acceptance of an in-kind gift, the College will consider if the gift is needed, wanted and/or has use for the purpose for which the College received its tax-exempt status, or if it can be sold and the proceeds used to benefit the College. Consideration will be given to the cost of accepting the gift (e.g. shipping and handling costs), the long term viability of the gift (e.g. maintenance costs, storage fees, insurance rates, etc.) and the resale market if the gift is sold. Some gifts will require paperwork documenting ownership, such as a title for a car or a boat.
2. For gifts of real estate, refer to the Gift Acceptance/Restricted Gift Acceptance Policy. Bonds, stocks or other marketable securities should be referred to Development Services. Such gifts should be received free from restrictions as to the disposition of the gift.
3. Prior to the acceptance of any in-kind gift, department heads must complete the In-Kind Gift Documentation form and forward to Development Services to insure proper gift acceptance procedures are followed. After Development Services approves, the gift will be recorded in Banner.
4. In all cases where doubt exists as to the acceptability of an in-kind gift, prior agreement shall be secured from the Gift Committee (refer to Gift Acceptance/Restricted Gift Acceptance Policy). During a campaign, the Campaign Steering Committee will act as the Gift Committee.
5. The department or area receiving the gift completes the In-Kind Gift Documentation form (see sample attached) and forwards the completed form to Development Services. The information needed includes
   name and address of donor,
   description of item(s) donated,
   approximate value,
   date received,
   any additional information.
6. Development Services retains all the information it receives on all in-kind gifts. This information includes
   a. donor correspondence, including all correspondence between donor and department, description of in-kind gift, appraisal, completed IRS forms and any other related documentation that is received by Development Services; and
   b. completed In-Kind Gift Documentation form.
7. It is the donor's responsibility to establish a value for the gift.
   a. For gifts valued by the donor at $1-249.99, Development Services will record the value of the gift provided by the donor.
   b. If the donor provides a value of $250 or more or no value is provided, the gift will be recorded at $1. Development Services will mail to the donor a copy of IRS Form 8283 and a set of instructions. If the form is not returned by the end of the fiscal year, Development Services

will contact the College faculty or staff member most likely to be able to establish a value. This estimated value will be used for donor recognition purposes as well as Banner records.

c. If the in-kind gift is valued by the donor at $5,000 or more, the donor must obtain at their own expense an independent appraisal. The appraiser must sign Section B Part III of the IRS Form 8283. Members of the Centenary College faculty or staff may not sign the form under Part III Declaration of Appraiser.
d. The IRS Form 8283 is returned to the College for the completion of the donee acknowledgement portion of the form. The College will then return the signed form to the donor.

8. In the event of disposition within two years of receipt by the College of any item of gift property for which the College signed the donee acknowledgement portion of the Form 8283, the College will prepare and file an IRS Form 8283 as required by law and mail a copy to the donee.
9. If the donor does not designate a department as recipient, the College will determine which department might benefit from the actual use of the gift property. Undesignated property, not of benefit to any specific department, will be sold and the proceeds will be added to the general, unrestricted funds of the College.
10. In-kind gift acknowledgement letters will include this message:
    Your gift may require the IRS Form 8283 be completed by you. Please consult your tax advisor.

3.4.1 In-Kind Gift Documentation Form

Centenary
COLLEGE OF LOUISIANA

In-Kind Gift
Documentation Form

This form should be completed for in-kind gifts. Please forward to Development Services.

To be completed by Centenary College personnel:

DATE RECEIVED: ____

DEPARTMENT: ____

CONTACT PERSON: ____

To be completed by donor:

ITEM(S) ____

____

____

____

DONOR'S ESTIMATE OF VALUE (if under $250)

____

If the value exceeds $250.00, an IRS FORM 8283 will be sent to the donor for completion. Only the value provided on this form will be recorded. The donor may wish to consult with his/her tax advisor.

DONOR NAME: ____

ADDRESS: ____

CITY/STATE/ZIP: ____

PHONE NUMBER: ____

EMAIL:

____

3.5 Gift Acknowledgement Policy

Gift Acknowledgement Policy

The Development staff will provide all official acknowledgements for charitable gifts to the College in an accurate and timely manner.

Definitions

1. Acknowledgement – An official letter which confirms that the College has received and accepted the donor's gift(s). An acknowledgement includes a statement, if applicable, declaring that the gift was made without the benefit and/or return of goods and services. This letter may be used by the donor for tax purposes.
2. Thank You Letter – A letter written and mailed by a College official or volunteer expressing gratitude and appreciation for a gift made to Centenary College. A thank you letter cannot be used for tax purposes since it will not include the goods and services language.

Note: Gifts from a Donor Advised Fund receive an "Acknowledgement" while the advisor receives a "Thank You" letter; both are to be reviewed and signed by the gift officer managing the relationship with the donor advisor.

Procedure

1. Within one working day of the receipt of a gift, the Data Specialist for Development Services will prepare and forward to the following Development staff charitable gift acknowledgement letters for original signature. If MANAGED, the letter should always come from the specific manager. If UNMANAGED, it could come from staff as outlined below:

    a. Associate Director of Annual Giving – gifts up to and including $2,499
    b. Associate Director for Donor Relations & Planned Giving – gifts between $2,500-$4,999
    c. Associate Director of Major Gifts – *position currently vacant*
    d. Director of Development – gifts between $5,000-$14,999
    e. Vice President for Development – gifts of $15,000 and above

    These signed letters will be returned to Development Services for mailing.
2. Any gift or pledge at or above $25,000 will receive a personalized letter or note from the President. The Director of Development Services will draft letters for the President for each qualifying gift.
    a. After entry into Banner of the new pledge or gift, the Data Specialist will notify by e-mail the donor contact information and details of the pledge or gifts to 1) the Director of Development Services and 2) the Administrative Assistant to the Vice President for Development.
    b. The Director of Development Services will draft a personalized letter within two working days and e-mail the draft to 1) the President's assistant for the President's approval and review, 2) the Administrative Assistant to the Vice President for Development and the Data Specialist, and 3) the Vice President for Development.
    c. When edited and approved, the President's assistant will finalize, date, print and mail the signed copy of the final letter.

    d. The President’s assistant will e-mail a .pdf of the final letter back to the Director of Development Services and the Data Specialist for retention in Development files for audit and reference purposes. The Data Specialist will store an electronic copy of the letter on the G:/ drive with other gift acknowledgements.

3. Any gift or pledge at or above $50,000 will receive a personalized letter or note from the Board of Trustees Chair, in addition to a letter from the President.
    a. After entry into Banner of the new pledge or gift, the Data Specialist will notify the Director of Development Services of the donor contact information and details of the pledge or gift.
    b. The Director of Development Services will draft a personalized letter within two days and will e-mail the draft to the Vice President for Development and the Administrative Assistant to the President. The President will review and edit the Chairman’s letter.
    c. The President’s assistant will forward a copy to the Chairman who will approve, sign and mail the letter. A scanned copy will be returned to the President’s assistant.
    d. The President’s assistant will email a .pdf of the final letter (as received from the Chairman) back to the Director of Development Services and the Data Specialist for retention in Development files for audit and reference purposes. The Data Specialist will store an electronic copy of the letter on the G:/ drive with other gift acknowledgements.
4. Where appropriate, the President and Chair will be asked to send personalized letters/notes at the request of the Vice President for Development for donors at levels below those noted in items 3 and 4. Additionally, letters will be drafted by the Director of Development Services on a quarterly basis that the President will send at his discretion based on the weekly report.
5. Gifts made “in memory of” or “in honor of” will receive an additional acknowledgement processed through Development Services.
6. Gifts made by payroll deduction, ACH bank draft, or monthly recurring check or credit card payment will receive an initial letter of confirmation at the start of their recurring donation and a “thank you” from the Vice President for Development prepared in January receipting total gifts for the prior calendar year.
7. All solicitors will provide thank you notes/letters to their specific prospects based on information received in the Daily/Weekly Posting Reports.

3.6 Endowed Funds Policy

Endowed Funds Policy

At a donor's request, the College may establish an endowment fund to monitor the gains, losses, and returns on investment of specific assets given to the College for the general purposes of the College or for a special purpose requested by the donor. While tracked individually, most assets will be merged with the endowment investments of the College. Such investments are governed by the investment policies set by the Board of Trustees.

1) Gifts for endowment must be in the form of cash or other negotiable instruments and must be of sufficient amount to meet the minimum thresholds in the Naming Opportunities policy. All other types of gifts must be judged by the Controller or Vice President for Finance and Administration as assets that can be liquidated in a timely manner. Endowment funds may be established upon receipt of a gift below the minimum amount required as a threshold in the Naming Opportunities Policy on the promise of a pledge to complete the required gift(s) within five years.
2) When the donor(s) and the College officers have agreed that an endowment fund will accomplish the donor's(s') intentions and is consistent with the purposes of the College, the donor(s) whose gift(s) will achieve the minimum to the fund, on behalf of all subsequent donors to the fund, and the President of the College, on behalf of the College, will enter into an agreement defining the use of the proceeds of the fund.
3) The agreement will contain at a minimum, the following items:
    A. A description of the assets contributed to the fund in order to meet the minimum contribution value requirements as outlined in the Naming Opportunities Policy;
    B. A description of the purpose of the fund;
    C. A formal name for the fund that references the naming categories of the Naming Opportunities Policy;
    D. A provision allowing for future gifts to be added to the fund;
    E. Explanatory language regarding the investment of the assets of the fund that includes the following information:
        1. Fund assets will be invested according to guidelines and policies set by the Investment Committee of the Board of Trustees and/or by the full Board;
        2. A fund's assets may be merged with other assets of the College for investment purposes, but will be entered into the College's books and records as a separate, named fund; and
    F. A statement of the alternative use policy that expresses the following information:
        1. Because of changed circumstances in the future, the Board of Trustees of the College may judge the originally designated use of the fund to be no longer possible or appropriate;
        2. While giving due consideration to the donor's(s') interests and intentions, the fund income, but no part of the principal, may be used to further the purposes of the College;
4) An expression of gratitude on behalf of the College and a pledge to keep the donor(s) and/or the donor's(s') designees/heirs informed about how the proceeds of the funds have been used each year, preferably before Thanksgiving.

5) The agreements will be certified with the official seal of the College. Two original agreements will be signed, one being retained by the Controller of the College and the other by the donor. Copies are distributed to Development and Financial Aid as appropriate. Also a copy will be placed in the endowment's file, and the agreement will be scanned by the author of the agreement.
6) When possible, the agreements should be appended with biographical information about the donor(s) and/or honoree(s) and specific procedures outlining the administration and use of the fund's proceeds. See Associate Director for Donor Relations & Planned Giving for a template that captures history and intent of funds to include with Endowed Fund files.
7) Proceeds from the endowment funds, as determined by the endowment spending policy of the College, will be expended according to the terms of the agreement in the fiscal year beginning at least six months after the minimum contribution value is achieved. The President may authorize exceptions to this portion of the policy when sufficient funds are available in the current budget to supplant income that otherwise would have been earned by the assets in the fund.

3.7 Pledge Guidelines

Pledge Guidelines

Policy

The College may accept a pledge, which is defined as a promise to make a gift or philanthropic grant, with documentation listing the date by which a pledge will be fulfilled. Pledges may be paid in monthly, quarterly, semi-annual, and annual installments.

Definition of a Pledge

A "Pledge" is defined as a promise to make a gift or philanthropic grant at or exceeding $1,000 with documentation listing the date by which a pledge will be fulfilled. Pledges may be paid in monthly, quarterly, semi-annual, and annual installments. The standard pledge commitment form (following) will be used to document all pledges.

Procedure

1. The following minimum information must exist to substantiate a pledge:
   A. The amount and purpose of the pledge must clearly be specified.
   B. There should be a clearly defined payment period.
   C. The donor may not prescribe contingencies or conditions without the consent of the College.
   D. Changes to original pledges must be documented in writing.
2. Written documents shall be prepared for each pledge, and that documentation should be forwarded to Development Services for entry into the existing computer records system. Acknowledgements for pledges $1,000$^+$ will not be issued until written documentation is received[1]. Pledge commitments will be scanned and electronically filed. Original pledge commitment forms will be retained for the duration of the pledge.

Pledge Acknowledgements

1. In a timely manner following receipt of a written pledge commitment between $1,000 and $24,999, the Data Specialist will prepare and forward to the following Development staff charitable pledge acknowledgement letters for original signature. If MANAGED, the letter should always come from the specific manager. If UNMANAGED, it could come from staff as outlined below:

   a. Associate Director of Annual Giving – gifts up to and including $2,499
   b. Associate Director for Donor Relations & Planned Giving – gifts between $2,500-$4,999
   c. Associate Director of Major Gifts – *position currently vacant*
   d. Director of Development – gifts between $5,000-$14,999
   e. Vice President for Development – gifts of $15,000 and above

   These signed letters will be returned to Development Services for mailing, scanning, and filing.

Oral pledges made during Call Center call times are acknowledged and invoiced by the third-party personalized messaging provider. Giving Network pledges under $1,000 are documented through an on-line form.

Pledges at or above $25,000 also receive a thank you from the President. Pledges at or above $50,000 also receive a thank you from the President and the Board Chair. See Gift Acknowledgement Policy for procedures.

Open Pledges (written pledges of $1,000$^+$)

1. The period in which pledges will be paid shall be clearly specified in the pledge document. Whenever possible, pledges shall be kept to the shortest period of time but shall not exceed ten (10) years.
2. Significant recognition for a “naming opportunity” shall not be activated until at least one-half (1/2) of the pledge has been paid.
3. Copies of all pledges shall be kept on file by Development Services.

Delinquent Pledge Processing

1. Development Services will send quarterly reports regarding delinquent pledges to solicitors who manage those delinquent donors. Development Services should send quarterly reports regarding delinquent pledges for unmanaged donors to Director of Development.
2. These reports will list the pledges that are behind in payments or have passed their final payment’s due date.
3. Where appropriate, each solicitor shall contact delinquent donors in order to determine if these pledges should remain active or are uncollectible.
4. Solicitors will inform Development Services in writing of a delinquent donor’s intent to (a) terminate the pledge or (b) continue to honor the pledge and provide new payment schedule dates.
5. Pledge deactivation requests must be reviewed and approved by the Vice President for Development before defaulted pledges will be written off.
6. Pledge balances will be “written off” when the College receives notification of a donor’s death, unless there are provisions in the donor’s will or the donor’s family has revealed intent to complete the pledge.
7. Open pledges will be maintained in the existing computer records database for three (3) years from the date of the pledge. At the beginning of the fourth (4) year, the Office of Development Services will either code these pledges as “uncollectible” or renew pending delinquent payments and the approval of the Vice President for Development.

3.8 Matching Gift Procedures

Matching Gift Procedures

Corporate matching gifts are an increasingly important source of funds for Centenary and can be the first step to a major corporate gift. The Development Division will continue to pursue this funding source with vigilance.

Restriction of Gifts
Matching gifts may or may not be restricted, depending on the wishes of the matching corporation and/or its employee.

Procedure

1. The Office of Development Services is responsible for ensuring that all matching gift records are accurate and correspond with donor records.
2. Donor participation in the matching gift process is reinforced by thank-you letters and reminders to non-participating donors that their employer may match their gifts to Centenary.

3.9 Donor Recognition Policy

Donor Recognition Policy

General Introduction

Recognition of donors is essential to the success of the College's fundraising efforts. Thanking donors promptly for their gifts in a manner appropriate to the size of their gifts and consistent with their personal wishes, including their desire for anonymity, is critical to the stewardship process. This activity sets the stage for continuing correspondence with donors and lays the foundation for continuing a mutually satisfying relationship between donors and the College. Donors who are given the opportunity to join in College-related activities and who are recognized for their participation are often the best sources for future gifts.

Strict adherence to policies and procedures regarding acceptance, recording, and acknowledgement of gifts assures consistency in honoring donors and establishing the acknowledgement responsibility for all steps in the recognition process.

Gift Societies

A. The College and its schools and departments receive many gifts annually for a variety of purposes. All gifts must be acknowledged in a consistent manner and receive equivalent gift society membership and benefits, keeping in mind that the more personal the recognition, the more likely additional gifts will be received.
B. Membership in the College's gift societies is based on cumulative annual giving during a fiscal year. Foundation and corporate gifts are included for the purposes of donor recognition. Gifts-In-Kind are handled at the discretion of the College for the purpose of donor recognition. In addition, soft/memo credit will be given for gifts, including matching gifts, from foundations/corporations received as a result of or controlled by the individual donor as well as for donations to Centenary from a donor's spouse.
C. All gifts will be recorded in the existing computer records system. Benefits to a donor will be predetermined or more personal based on the donor's interest or purpose of the gift, and may include permanent recognition, publicity, and other honors.
D. Gift acknowledgement and recognition levels for gifts, based upon cumulative giving, are organized into the following levels:

Jackson Society	$100,000^{+}$
Shreveport Society	$50,000-$99,999
Founder's Society	$25,000-$49,999
Trustee Society	$10,000-$24,999
Leadership Society	$5,000-$9,999
1825 Society	$1,825-$4,999
President's Society	$1,000-$1,824

The name of and recognition level for each Gift Society may be revised at any time with prior approval by the President and Board of Trustees.

E. The College can recognize donors at its discretion with token items within guidelines and parameters established by IRS regulations regarding safe harbor.

College-Wide Recognition

A. Recognition Sites
Donor recognition sites can be erected for capital campaigns or specific departments, schools, or programs. Approval for such sites must be obtained pursuant to Naming Opportunities Policy.

B. Annual Honor Roll of Donors
Based upon cumulative annual giving within a fiscal year, an annual Honor Roll of Donors shall be maintained on an on-going basis on the Centenary website and may be included with an Annual Report.

C. President's Circle
Donors of $1,000 or more in each fiscal year will be included as a member of the President's Circle, and will be recognized in the annual President's Circle Newsletter and invited to the annual President's Circle reception in September.

3.10 Memorial and Honor Recognition

Memorial and Honor Recognition

Centenary receives many gifts in memory or in honor of someone. An important part of gift processing is properly notifying relevant parties involved in the donation.

Procedure

1. In all cases of memorial and tribute gifts, the families of the honoree or deceased will be notified of the contribution and the contributor's identity without reference to the gift amount.
2. The donors will receive a gift receipt generated through the Office of Development Services that will be supplemented with letters of appreciation from the appropriate gift officer.
3. Tribute gifts will be published in the appropriate Centenary publication with copies of that publication sent to the donor and the party to whom tribute was paid or family of the person memorialized.

Named Fund

1. Buildings, programs, and other facilities can be named in memory or in honor of someone. (Refer to 3.3, Naming Opportunity Policy.)

3.11 Electronic Stock Transfer

Electronic Stock Transfer

The College may receive stock gifts by electronic transfer, according to I.R.S. guidelines, through a limited number of College-approved brokerages.

PROCEDURE

1. A donor who prefers to make a gift in the form of stock may do so using electronic transfer between brokerage accounts.
2. The Controller of the College will maintain a list of brokerage accounts approved to receive such gifts on behalf of the College and will keep the Development Division, and particularly the Office of Development Services, updated with that information, including transfer instructions for each account.
3. The Controller and Vice President for Finance and Administration shall open and close the brokerage accounts to be used for such gifts according to the guidelines below (4, 5, and 8). If for any reason a brokerage firm fails to adhere to these guidelines in a professional and timely manner, the Office of Development Services will request that the College's account with the brokerage firm be closed.
4. Each July, the Office of Development Services will prepare for the Controller's signature a memorandum of agreement between the College and the brokerage stating the requirements below and issuing a standing order to liquidate all stock immediately upon receipt and disperse the proceeds to the College. The letter will instruct that checks be sent to the Controller of the College. This letter is also to include an agreement for the brokerage to sign and return.
5. Brokerages wishing to be approved for receiving such transfers must agree to provide the following services at no additional charge to the College or Donor:
    a. Be prepared to receive stock transferred into College accounts at any time, without prior notice from the College or Donor.
    b. Within one business day of the transfer, provide written notification to the Development Services Office and the Controller of the following:

        i. That a stock gift has been received in a College account
        ii. The name and address of the Donor making the gift (if known).
        iii. The intended purpose of the gift (if known).
        iv. The type of stock transferred.
        v. The high, low and mean trading values of the stock **on the date of the transfer**.
        vi. The number of shares transferred.
        vii. The gift value of the stock (number of shares multiplied by the mean trading value).

    Development Services will not record any gift made by transfer of stock without written notification from the broker. An email from the broker is preferred as the initial notification to be followed by receipt of a hard copy documenting the transaction. If a broker cannot provide email notification, notification will be made by letter or fax transmission. For all initial correspondence not sent via email, fax transmission followed by US mail sent to the Office of Development Services is the order of preference.

6. A donor's intent will be documented in writing. The Office of Development Services will be responsible for determining the Donor's wishes if unknown, recording the gift with the proper designation and properly acknowledging the gift. Gift acknowledgments for stock transfers will include a form (following) stating intent which the donor will be instructed to sign and return in a BRE. When soliciting or facilitating such gifts, the Development Division and/or the Office of Development Services, will provide the Donor or the Donor's broker with the DTC (Depository Trust Company) and account number for the brokerages selected to receive the gift.
7. In the rare case that a Donor wishes for the College to establish an account at his/her brokerage to receive the transfer, the Controller may do so provided that the broker understands and agrees to the following:
    a. The account will remain open only to service the needs of that specific Donor, unless the brokerage is later added to the approved list by the Controller and VP for Finance and Administration.
    b. If there is no activity in the account for a period of more than one year, then the Controller will close the account.
    c. The broker agrees to the terms outlined in 4 and 5 above.
8. Whenever an employee or volunteer of the Development Division receives notification from a potential donor that a gift may be made to the College by means of electronic transfer, he/she should immediately call/email Development Services, offering as much detail as known concerning the date, number of shares, type of stock, brokerage firm employed, etc. in the gift transfer. Development Services will, in turn, notify the respective brokerage firm, if known, concerning the impending transfer of stock.

3.11.1 Stock Gift Acknowledgement – Sample Letter

Stock Gift Acknowledgement – Sample Letter

Date

Name
Street 1
Street 2
City State Zip

Dear First,

Thank you for your recent gift to Centenary College of <number of shares of specific stock> to support the <Centenary Fund>. The gift reference number is <gift reference number>. <Institution formerly holding stock>reports that this stock transfer was received in to our account on <date received>. They also report that the high value of the shares was <amount> on that day and the low value was <amount> that day, yielding an average of <amount>. Multiplying the number of shares received by the average yields a total gift value of <amount>. If you have any concerns about the date or the valuation of this gift, please contact your stock broker or tax advisor.

<Insert current College event, accolade, etc.>

In an effort to provide our donors with accurate information in cost effective formats, we list donors at http://www.centenary.edu/philanthropy/2014-15. If you have specific questions about your giving or this receipt, please call 318-869-5216. For other issues, contact me directly at 318-869-5136 or flandry@centenary.edu.

Respectfully,

<VP FOR DEVELOPMENT>

Centenary College of Louisiana is a charitable organization as described in section 501 (c) (3) of the Internal Revenue Code; federal tax ID number 72-0408915. No goods or services have been provided in consideration of this gift. Your gift is tax deductible under the rules of the Internal Revenue Service as they apply to your individual circumstances.

3.11.2 Stock Gift Acknowledgement – Sample Intent Form

Stock Gift Acknowledgement – Sample Intent Form

By my signature below, I confirm that the purpose of the stock transfer to Centenary College on (date) is to support

(insert purpose of gift)

_______________________________________ _________________________

(name of donor) **Date**

Please sign and return this form using the enclosed business reply envelope.

3.12 Planned Gifts

Planned Gifts Policy

Policy

Given the projected transfer of wealth nationally and the demographics of the Centenary community, planned gifts have enormous income potential to the College. All development gift officers, directors, and administrators should have a basic knowledge of planned giving and look for ways to vigorously promote planned gifts to alumni, faculty and staff (current and retired), and other potential donors.

Procedure

Assets That May Fund a Planned or Charitable Gift
The following assets, including partial undivided interests, may be transferred to Centenary in fulfillment of a gift. Gift plans and tax benefits may vary with each type of asset. This list is not exclusive to type of asset.

Cash	Retirement Plans
Publicly Traded Securities	Savings Bonds
Mutual Fund Shares	Passbook Savings Accounts
Closely Held Stock	Crops and Livestock
Land	Oil/Gas/Mineral Rights
Rental Property	Royalties
Vacation Property	Partnership Interests
Commercial Property	Patents/Trademarks/Copyrights
Life Insurance	Boats
Art and Antiques	Automobiles

Wording in Bequests and Life Income Agreements

1. All planned gifts to the College should be given to “Centenary College of Louisiana, a nonprofit corporation organized and existing under the laws of the State of Louisiana as an educational institution.”

Bequests

A. Direct, unencumbered bequests provide Centenary the full value of what was bequeathed to it and provide the testator’s estate with a charitable deduction for the same value. The Associate Director of Planned Giving & Donor Relations (PGO) is available for personal consultations with individuals, their attorneys, or other financial advisors regarding gifts as bequests.
B. Gifts of bequests will be accepted under the same terms as outright gifts as described in The Gift Acceptance Policy.
C. Attempts shall be made to discover bequest plans whenever possible in order to determine whether inappropriate property has inadvertently been left to Centenary (*e.g.*, intended bequests of property other than cash or marketable securities should be brought to the attention of the PGO so that the donor can be advised how to conform his or her plans to Centenary’s policies).

D. Depending on the size of unrestricted bequests, all such bequests will be added to Centenary's general endowment fund.

E. All gifts received for restricted endowment purposes, when accepted, will be accepted only on the condition that, should the purpose for which the funds are provided cease to exist, Centenary shall allocate income from those funds to purposes as near to the original intent of the donors as possible. Such provisions should be provided in all wills and devices, as is reasonably possible.

F. There are four ways a bequest can be made to Centenary:

  I. A <u>fixed amount</u> of cash or securities, certain personal property, or a <u>percentage</u> of an estate can be given.
  II. In a <u>residual</u> bequest, after other beneficiaries receive a designated portion of the estate, the remainder of the estate is left to Centenary.
  III. A <u>contingent</u> bequest can be made where Centenary will receive a portion of the estate only if named beneficiaries pre-decease the testator of the bequest. This form is often selected by those who desire to provide for young families.
  IV. A <u>testamentary trust</u> bequest creates a trust and provides for the income or a stated amount of the income to be paid to the beneficiaries of that trust. Upon death of the trusts' beneficiaries, Centenary receives the use of the property in trust. This option may actually increase life income for beneficiaries, since it reduces the amount of the estate subject to estate taxes. Centenary's policy allows for only two beneficiaries to be named under such trusts.

Life Income Agreements

Life income plans are irrevocable gifts that include *charitable gift annuities*, *charitable remainder trusts*, and *pooled income funds*. <u>Charitable gift annuities</u> (and <u>deferred charitable gift annuities</u>), <u>charitable remainder unitrusts</u>, and <u>charitable remainder annuity trusts</u> allow a donor to provide income to himself/herself or his/her designee and leave the remainder to Centenary. <u>Charitable lead trusts</u> allow a donor to provide income to Centenary with the remainder returned to the donor or his/her heirs/designees at the end of a specified period.

A. Charitable Gift Annuities

A charitable gift annuity is partly a charitable gift and partly a purchase of an annuity contract in which the donor transfers some asset to Centenary, and Centenary agrees to pay the donor (and if desired, one other beneficiary) a fixed annuity for life.

  I. A charitable gift annuity provides the donor with an immediate tax deduction and regular income payments for life.
  II. The amount of the annuity payment is determined by the following four factors:
    a) The dollar value of the annuity gift;
    b) The age and number of annuitant(s);
    c) The annuity rate selected; and
    d) The federal "discount rate" in effect on the date of the gift.
  III. The tax deduction is also a function of the age of the annuitant(s), annuity rate selected, and the federal discount rate selected.

B. Charitable Remainder Trusts ("CRTs")

  I. CRTs may be funded with real property, cash, or securities. Property passes to the plan free of capital gains tax and is credited to the plan at its current full fair market value, regardless of cost basis and regardless of reduction rules affecting income tax deductions.
  II. CRTs are <u>not</u> tax avoidance devices or investment vehicles, and all disclosures required by state and federal regulatory agencies shall be made in a thorough and timely manner.

III. CRTs are separate legal entities, and their obligations are limited to their assets. CRTs file their own returns, make all payments from their assets, and must have a federal trust number. CRTs make payments to beneficiaries under strictly hierarchical rules. The sources of possible income payments include the following:

a) Ordinary Income;
b) Realized capital gain;
c) Tax exempt income; and
d) Original principal.

These four sources must be used in this order to make required payments.

IV. CRTs fall into two broad categories: charitable reminder unitrusts and charitable remainder annuity trusts.

a) Charitable Remainder Unitrusts ("CRUTs")

i. CRUTs must pay income beneficiaries a fixed percentage of trust assets, which is based on a trust's fair market value. That fixed percentage cannot be less than 5%. Therefore, CRUTs pay a variable amount to the income beneficiaries (due to annual fluctuation in the values of trust assets), rather than a certain sum such as must be paid by an annuity trust. Centenary assesses that value annually on the first business day of each year. CRUTs have a stated maximum life of 20 years.

ii. Since all earnings in excess of the required payments are reinvested in the trust, growth in annual income depends on having an annual payment that is low enough to have some excess earnings available for reinvestment.

iii. CRUTs fall into three types, plus an option known as a "Flip" Unitrust.

1) "Standard Unitrust" – The most common version; allows the trustee to invade the principal if income is insufficient to meet the required payment.
2) "Net Income Unitrust" – The donor receives the lesser of the stated percentage payment or the net income earned, and thereby avoids invading the principal. This type is appropriate for donors who are limited to funding the trust with real estate or other non-income producing (or hard to sell) assets and for donors who do not want their trust to pay them anything for some years.
3) "Net Income Unitrust with Makeup Provisions" –Similar to the "Net Income Unitrust" above except that in years that the trust earns more than the stated percentage, the trust will pay income above that stated percentage as necessary to bring all payments made in years that net income was paid below the stated percentage up to the stated amount.
4) "Flip Unitrust" – Formed by combining a "Net Income Unitrust with Makeup Provisions" with an illiquid asset (*e.g.*, real estate) and dropping the net income provisions; as a result, it becomes a "Standard Unitrust" (above) when the assets are sold and the unitrust begins to generate income. After the "flip" occurs, the trust pays only the unitrust amount with no deficit makeup.

b) Charitable Remainder Annuity Trusts

i. Annuity trusts share many of the rules and conclusions applicable to unitrusts. However, unlike unitrusts, annuity trusts make the same payments, year in and year out. This fixed dollar payment is determined initially as a percentage of the value of the assets contributed to fund the trust. Therefore, everything is dependent upon the initial fair market value of the assets in the trust. Thereafter, the value of the trust assets is irrelevant, so long as there are assets enough to make the annual payments.

ii. Once the annuity trust is established, additional assets cannot be transferred to it.

iii. The trust should be funded with cash, equities, or bonds.
iv. The PGO will identify a limited number of corporate fiduciaries who hold such annuity trusts. Only when specifically asked may any corporate fiduciary be recommended by Centenary to a donor. Donors will be encouraged to interview potential trust officers and make their own informed choices.

Charitable Lead Trusts

A charitable lead trust is a trust arrangement that provides an income payment to Centenary at some designated rate for the donor's life or over a pre-established number of years. At the conclusion of the payment period, the trust assets are returned to the donor or to his or her designee (Note: each course has different tax consequences.)

A. If the donor designates himself/herself as the final recipient of the trust assets, he/she has given up his/her interest in the income value of the trust assets, and thereby earns an income tax deduction.
B. If the donor designates someone else as the final recipient of the trust assets, that individual has given up the benefit of what would have been a gift or bequest made in his/her favor, and thereby has earned a gift or estate tax deduction from that gift.
C. Charitable lead trusts fall into two categories, based on how the trust income is paid and who is designated to receive the trust assets at the end of the trust term.
    I. If the donor is designated to receive the trust assets, the charitable lead trust is a "grantor trust," and, pursuant to grantor trust rules, the donor must pay income taxes on income earned by the trust and paid to Centenary. Most donors are not attracted to this type of charitable lead trust unless they are able to fund the trust with tax-exempt property or if the value of the tax deduction earned in the year of the gift outweighs the burden of future tax dues.
    II. "Non-grantor lead trusts" have some beneficiary other than the donor named to receive the trust assets when the trust ends. This type of charitable lead trust does not generate any income tax obligations for anyone as the income is earned by the trust and paid to Centenary (*i.e.*, assets are shielded from estate and gift tax bills, which is especially valuable to donors with large estates).
D. Charitable Lead Trusts can usually be funded with cash or securities (tax exempt securities may be warranted as stated above).

Life Insurance

Centenary encourages donors to name the College to receive all or a portion of the benefits of life insurance policies that donors have purchased on their lives.

A. New or existing policies may be given outright or Centenary can be named the owner and beneficiary of an existing policy.
B. Centenary will accept fully paid life insurance policies in which the donor has named the College as the recipient of all or a portion of the benefits of the insurance policy. The tax consequences to the donor depend on whether the policy's ownership has been endorsed over to Centenary and whether the benefits have been irrevocably assigned to the College.
    I. A donor who irrevocably transfers life insurance to Centenary can claim income tax deductions for the policy's cost basis or cash surrender value, whichever is less. The donor can never claim an income tax deduction for the policy's face value.

II. Naming Centenary as a beneficiary on the policy is not sufficient to generate an income tax deduction for the donor because the donor can rescind/change his or her decision at some later date. To be entitled to a deduction, the donor must make Centenary both beneficiary and owner of the policy.

C. Upon receiving a paid-up policy, Centenary, as owner, can surrender it and obtain the cash value or keep the policy until the death of the donor.

D. If the donor takes out a new policy with Centenary as the irrevocable owner and beneficiary, the donor may pay the premium or give the premium money to Centenary (*a.k.a.* "pass through") with Centenary paying the premiums. The "pass through" is preferred by Centenary due to the following reasons:

  I. when the donor makes a cash gift to Centenary for the premium amount (assuming Centenary is under no obligation to apply the gift to the premium payment), the donor receives all the benefits both in tax savings and the personal satisfaction of making an outright gift;

  II. the donor maintains contact with Centenary and can be acknowledged properly as each gift/payment is made; and

  III. Centenary maintains control of the premium payments and policy.

E. Centenary will not, however, as a matter of course agree to accept gifts from donors for the purpose of purchasing life insurance on the donor's life. Exceptions to this policy will be made only after researching relevant state laws to assure that Centenary College of Louisiana has an insurable interest under applicable state law.

F. No insurance products may be endorsed for use in funding gifts to Centenary College of Louisiana without approval by the Board of Trustees.

G. In no event shall lists of Centenary College of Louisiana's donors be furnished to anyone for the purpose of marketing life insurance for the benefit of donors and/or the College. This policy is based on the fact that this practice represents a potential conflict of interest, may cause donor relations problems, and may subject the College to state insurance regulation should the activity be construed as involvement in the marketing of life insurance.

Retained Life Estate Gifts

A. A retained life estate agreement ("RLEA") is a gift of a donor's home, vacation home, or farm (including residences).

B. Donors irrevocably relinquish full or part ownership of their home in exchange for the right to enjoy the use of the property as long as they desire and as long as is noted in the RLEA. For this exchange, the donors receive an income tax deduction. Donors are responsible for maintenance, taxes, and insurance on that property for as long as they occupy it under the RLEA, unless there is an agreement approved by the President or other authorized person(s) stating otherwise.

C. Life estate gifts will be accepted with the approval of the President, Vice President for Development, and Vice President for Finance and Administration in situations where the asset involved appears to be a minor portion of the donor's estate and only if these officers are satisfied there has been a full disclosure by the donor of the possible future ramifications of the transaction.

D. The donor may relinquish his or her retention of the estate at any given time and give the remainder to the University.

The Paul Marvin Brown, Jr. Society

The Paul Marvin Brown, Jr. Society (the “Paul Brown Society”) is named for an alumnus of Centenary (Class of 1917) who served as Chairman of the College’s Board of Trustees. The Paul Brown Society honors those alumni and friends who include Centenary in their estate plans.

3.13 Development Records Retention

3.13.1 Development –Related Records

Development-Related Records

Policy

All Development-related use of computer resources and records should adhere to Centenary's policies governing responsible use of computer resources.

Procedure

1. Program access granted to any individual may not be transferred to or shared with any other person without written authorization.
2. Computing resources may not be used for any unlawful or unauthorized purposes.
3. Computing resources may not be used for any personal commercial purpose or gain.
4. Individuals may not participate in any activity that needlessly interferes with fair use of computer resources by others.

Access to Donor Records

Biographical and financial records of alumni and donors of Centenary are stored and maintained by the Development Division in central files and in the existing computer records system ("Donor Records").

1. Access to Donor Records shall be restricted the following ways:
    A. Donor Records stored in central files and in the existing computer records system are to be treated as confidential.
    B. In order to have access to any donor-related records, individuals must first receive authorization clearance by the Vice President for Development. Upon approval, each user shall receive a personal access code to the existing computer records system from Centenary's Information Technology Services.
    C. Gift Officers and other authorized College staff may request reports, mailing lists, reports, and other information from Development Services by completing and submitting electronically via the College's website an Information Request Form.

Confidentiality

1. All donor-related information is considered confidential and is strictly available on a need-to-know basis only.
2. All donor-related information is only open to Directors and Gift Officers and to other authorized College staff in order to assist them in the fundraising process.
3. Individuals who have authorized access to files from the Development Division shall be briefed on the importance of confidentiality. They are to take every precaution to insure that the documents are secure in their possession and properly returned or discarded when no longer in use.

Reports and Research Request Policy

Policy

Directors and Gift Officers shall draft “Contact Reports” for all face-to-face meetings and other communications with current and prospective donors, Trustees, and alumni. Directors, Gift Officers, and staff may request research, reports, and other information on prospective donors to further Development Division goals.

Procedure

Contact Reports

1) These reports should include the name of the person contacted (and, if relevant, the company or foundation whom that person represents), contacting Director’s/Gift Officer’s name, date of meeting, type of meeting (*e.g.*, personal solicitation, phone call, email, etc.), and a summary of what happened during the meeting, and any further action required (and, if relevant, a date on or around which that action must occur).

2) A copy of these reports shall be entered into the existing computer records system and filed in foundation and scholarship files, as is necessary.

Requests for Research, Reports, and Other Information

1) Requests for research on prospective donors must be submitted to the Director of Development Services.

2) To request reports, mailing lists, and other information from Development Services, an Information Request Form must be completed and submitted electronically via the College’s website (or, if the computer system is not functioning, as a hard copy to the Director of Development Services.

3) All research at Centenary will adhere to the Council for Advancement and Support of Education (“CASE”) recommendations and Principles of Ethics and Confidentiality in Development Research.

3.13.3 Donor Bill Of Rights

Donor Bill Of Rights

To assure that development merits the respect and trust of our supporters, and that donors and prospective donors can have full confidence in Centenary College of Louisiana (“Centenary” or the “College”), we declare that all donors have these rights:

I. To be informed of Centenary’s mission, of the way the College intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.

II. To be informed of the identity of those serving on Centenary’s Board of Trustees and to expect the Board to exercise prudent judgment in its stewardship responsibilities.

III. To be assured their gifts will be used for the purposes for which they were given.

IV. To receive appropriate acknowledgment and recognition.

V. To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.

VI. To expect that all relationships with individuals representing Centenary will be professional in nature.

VII. To have the opportunity for their names to be coded as “do not solicit” at their request.

VIII. To feel free to ask questions when making a donation and to receive prompt, truthful, and forthright answers.

(*Adapted from the “Donor Bill of Rights” created by the American Association of Fundraising Counsel, Association for Healthcare Philanthropy, Association of Fundraising Professionals, and Council for Advancement and Support of Education)*

Policy to Protect Privacy of Donors and Alumni

I. Introduction

Centenary College of Louisiana ("Centenary" or the "College") is committed to protecting the privacy of its donors, volunteers, employees, and other stakeholders.

We value the trust of those we deal with and of the public in general, and we recognize that maintaining this trust requires us to be transparent and accountable in maintaining the confidentiality of the personal information that you choose to share with us.

This privacy policy outlines the principles that Centenary applies in order to ensure the confidentiality and integrity of all personal information shared with us.

II. Definitions

A. "Personal Information" means information that is recorded in any form, both fact and opinion, and that can be used to distinguish, identify, or contact a specific individual. It does not include business contact information and certain publicly available information, such as names, addresses, and telephone numbers as published in telephone directories.

B. "Donor" means any individual or organization that contributes funds to Centenary; "alumni" means persons who have attended Centenary College and whose information is stored in the College's data system

C. "Employee" means both paid and volunteer workers, students and leaders of Centenary, including but not limited to administration, staff, faculty, student workers, Alumni Association members, and Board of Trustee members.

III. Principles

A. *Accountability*
We are responsible for the personal information under our control and in our possession or custody, including information that has been transferred to a third party for processing. We will use contractual or other means to provide a comparable level of protection when a third party is processing the information.

B. *Purpose*
We will identify and document the purposes for which we collect, use, or disclose personal information at or before the time of collection. The purposes will be limited to those that are related to our business and that a reasonable person would consider appropriate under the circumstances. We collect, use, and disclose personal information concerning our donors/alumni for the following reasons:

1. To establish a relationship and to communicate with donors/alumni;
2. To engage donors/alumni in events and programs hosted by the college;
3. To understand who our donors/alumni are and how we may improve our services to meet their preferences and expectations;
4. To process a donation (*e.g.,* to process a credit card transaction);
5. To issue and deliver a donation tax receipt;
6. To distribute a designated donation to another registered charity;
7. To recognize contributions;
8. To recruit, train, recognize, and retain highly qualified and motivated employees and volunteers; and

9. To meet requirements imposed by law.

If we plan to use personal information we have collected for a purpose not previously identified, we will identify and document this purpose before such use.
We will make a reasonable effort to specify the identified purposes, orally or in writing, to the individual from whom the personal information is collected either at the time of collection or after collection but before use. We will state the identified purposes so that an individual can reasonably understand how the information will be used or disclosed.

C. *Consent*

Personal information will be collected, used, or disclosed with the knowledge and consent of the individual, or as required by law. The way that we seek consent, including whether it is express or implied, may vary depending upon the sensitivity of the information and the reasonable expectations of the individual. An individual can withdraw consent at any time, subject to legal or contractual restrictions and reasonable notice. We will inform individuals of any implications of withdrawing consent. In general, we will seek consent for the use or disclosure of information at the time of collection. In certain circumstances, consent may be sought after the information has been collected but before use (*e.g.,* where we want to use information for a purpose not previously identified).

D. *Limiting Collection*

We will limit the amount and type of personal information collected to what is necessary for our identified purposes, and we will collect personal information only by fair and lawful means.

E. *Limiting Use, Disclosure, and Retention*

Personal information will not be used or disclosed for purposes other than those for which it was collected, except with the consent of the individual or as required by law. Personal information will be retained only as long as necessary to fulfill the identified purposes. Personal information that has been used to make a decision about an individual will be retained long enough to allow the individual access to that information after the decision has been made and, in the event of an access request or a challenge, long enough to exhaust any recourse an individual may have under the law. Where personal information is no longer required to fulfill the identified purposes, it will be destroyed, erased, or made anonymous.

F. *Accuracy*

We will use our best efforts to ensure that personal information, including information that is disclosed to third parties, is as accurate, complete, and up-to-date as is necessary for the purposes for which it is to be used.

G. *Safeguards*

We will protect personal information with safeguards appropriate to the sensitivity of the information. Our safeguards will protect personal information against loss or theft, as well as unauthorized access, disclosure, copying, use or modification, regardless of the format in which the information is held. We will make our employees and volunteers aware of the importance of maintaining the confidentiality of personal information, and we will exercise care in the disposal or destruction of personal information to prevent unauthorized parties from gaining access to the information. Our methods of protection will include physical measures (*e.g.,* locked filing cabinets and restricted access to offices), organizational measures (*e.g.,* limiting access on a “need-to-know” basis), and technological measures (*e.g.,* use of passwords and encryption).

H. *Openness Concerning Policies and Practices*

We will make readily available to donors and employees specific information about our policies and practices relating to the management of personal information. The information we will make available will include:

1. How to gain access to personal information;
2. Type of personal information held by us, including a general account of its use;
3. General information concerning our policies; and

4. What personal information is made available to a donor’s designated agencies.

J. *Recourse*

Any individual can address a challenge concerning our compliance with any of these Privacy Principles to the Vice President for Development at Centenary College. We will investigate all written complaints. If we find a complaint to be justified, we will take all appropriate measures, including, if necessary, amending our policies and practices.