

Yosemite Conservancy and Yosemite National Park Donor Recognition Plan

The National Park Service (NPS) recognizes philanthropy as both a noble tradition and as a vital element in the success of today's National Park System. Philanthropy provides an opportunity for people and organizations with a passion for parks to directly engage in caring for them.

At Yosemite National Park (Yosemite), donations through Yosemite Conservancy (Conservancy) comprise a critical source of support for programs and services including: major restoration projects, trail rehabilitation and access, wildlife management, habitat restoration, scientific research, cultural and historic preservation, visitor services and education, volunteer projects and youth programs.

The Director of the National Park Service issues policies that serve as the framework for NPS employees and park partners in relation to donation activities and fundraising campaigns which benefit the NPS. These policies can be found in *Director's Order #21 (DO#21): Donations and Philanthropic Partnerships*, December 28, 2016. A Donor Recognition Plan (Plan) is required for parks or programs that receive or are likely to receive donations; thus, this document.

Yosemite National Park regularly receives funding through Yosemite Conservancy for projects and programs throughout the park. NPS and Yosemite Conservancy affirm the importance of donor recognition, thanking donors for their support of the mission of the park. This Donor Recognition Plan (Plan), which is consistent with DO#21, balances the need to express appropriate and equitable acknowledgement of donors with the need to protect the public values and purposes of the NPS.

For the purposes of this plan, the term "donation" includes something of value (gifts, cash, in-kind goods or services, competitively awarded foundation grants, and support from businesses) received by the NPS, or from an outside source for the benefit of the NPS, without consideration or an exchange of value. A "philanthropic partner" is an organization or individual that has a philanthropic agreement with the NPS to fundraise or otherwise generate donations on behalf of, or for the benefit of, the NPS. "Philanthropy" is a giving of time, money, and expertise to advance the common good. A "sponsor" is a contributor who provides a substantial portion of the funding and/or in-kind goods or services for an event or program.

Through Yosemite Conservancy, the NPS may accept, use, and recognize donations of various kinds to support and promote its mission, consistent with applicable laws and policies. Examples of acceptable gifts and forms of support include:

- Cash for either restricted or unrestricted purposes that are in keeping with Yosemite's mission
- Tangible personal property
- Securities (such as common stocks, preferred stocks, and bonds)
- Real estate (land and improvements), or interests in real property (easements)
- Artifacts and collections relevant to the park's mission
- Planned and phased giving (estate planning, bequests, charitable gift annuities, charitable trusts, and retirement plan or life insurance beneficiary designations, etc.)
- Intellectual property
- In-kind goods or services
- Pro bono services (such as professional engineering or technical expertise)

Donations may be used to fund or otherwise support any activity for which appropriated funds could be used, subject to the requirements described in DO#21.

A separate Philanthropic Partnership Agreement governs the partnership between Yosemite National Park and Yosemite Conservancy. Annual Work Plans will be developed with the Conservancy to identify fundraising needs, opportunities and activities.

This Plan will be reviewed each year and updated as necessary.

I. Donation Review and Acceptance

The support received through donations is important to the successful accomplishment of the NPS mission. As a steward of the public trust, the NPS must ensure that donations are made in a legally and ethically appropriate manner. Before accepting a potential donation, Yosemite National Park and Yosemite Conservancy must first weigh the totality of the circumstances surrounding it.

To be accepted, donations must:

- Ensure that any conditions or restrictions on the donations are consistent with the NPS mission and values;
- Avoid conflict of interest;
- Maintain the integrity of the NPS and the Department's programs and operations;
- Maintain impartiality and the appearance of impartiality;
- Maintain public confidence in Yosemite National Park, the NPS, the Department, and their programs and employees;
- Protect NPS brand integrity;
- Consider the cumulative effects of donations that occur across multiple regions or parks; and,
- Prevent financial liability.

Yosemite Conservancy may accept a gift that will benefit the NPS when that gift: (1) conforms to a jointly created gift acceptance policy; (2) does not imply endorsement of an individual, organization, or product; and, (3) supports a jointly identified need of the NPS and Yosemite Conservancy through a Philanthropic Partnership Agreement and an Annual Work Plan.

Departmental and NPS policies govern the vetting of donations made directly and indirectly to the NPS. Donations made to Yosemite Conservancy solely to support their general operations and unrelated programs are not subject to NPS donor review policies although they should be consistent in the public's perception.

Yosemite National Park and Yosemite Conservancy will refer to the specific guidance regarding "Donor Review" outlined in DO#21 (Section 5.0 – 5.5) to evaluate donations. NPS and Yosemite Conservancy will follow the requirements described in DO#21 related to vetting potential donors and approving and/or obtaining approval for donations.

Yosemite National Park and Yosemite Conservancy reserve the right to decline any gift for any reason.

II. Donor Recognition

a) Thank You Letters

All donations with a value of \$25 or more that are accepted by Yosemite Conservancy on behalf of Yosemite National Park will be acknowledged in writing. The acknowledgement letter notes the gift, donor, date of acceptance, and any restrictions. When securities or in-kind gifts are received, a description – but not a dollar estimate – of the gift/item is included in the acknowledgement (the estimated value must be determined by donor if he/she chooses to include it as a tax deduction). On behalf of the park, the Superintendent additionally thanks donors for gifts of \$25,000 or more.

b) Additional Types of Recognition

In addition to thank you letters and depending on the value of the donation, the park and/or Yosemite Conservancy may also acknowledge a donor through the following: a personal call or visit, press event, printed/digital/media platforms (brochures, exhibits, displays and audiovisual productions), public website, photo opportunities, mementos, certificates, invitations to special events with appropriate recognition at the event, and finally, private events. Some will be “pending donor approval” (i.e., public press events, etc.).

c) Acknowledgement on the Donor Recognition Display at the Valley Visitor Center

The courtyard behind the Valley Visitor Center is a central location where donors are publicly recognized annually in a systematic and ongoing manner. This acknowledgement serves as both: 1) a tangible and visible record of philanthropic support for the park; and, 2) an expression of Yosemite National Park’s and Yosemite Conservancy’s appreciation for such support.

The donor recognition display will consist of a well-designed honor wall and honor register (binder) that recognizes the following:

- Friends of Yosemite
- John Muir Heritage Society
- In Memoriam
- Estate Gifts
- Corporations & Foundations
- Legacy Society Members
- Sequoia Society Members
- Yosemite Conservancy Life Members
- Galen Clark Society Members
- Yosemite Conservancy Volunteers



The Yosemite Conservancy donor honor wall is located behind the Valley Visitor Center in Yosemite Valley. Donor recognition includes the donor’s name and the category designation within which the donation falls. Donors and volunteers who do not request anonymity will be acknowledged appropriately. Donor requests for anonymity will be respected. In compliance with DO#21, the donor honor wall does not include logos, advertising, marketing slogans, taglines or other forms of commercialism.

In any given fiscal year, monetary contributions will be recognized as follows:

1. **Friends of Yosemite**

Individual donors of \$25 to \$999 are listed alphabetically for one year in the honor register (binder) which is located below the donor honor wall.

2. **John Muir Heritage Society**

<u>Level</u>	<u>Amount of Donation</u>	<u>Duration of Recognition</u>
Protector	\$1,000 - \$2,499	1 year in honor register
Guardian	\$2,500 - \$4,999	1 year on honor wall
Sentinel	\$5,000 - \$9,999	1 year on honor wall
Benefactor	\$10,000 - \$24,999	1 year on honor wall
Patron	\$25,000 - \$49,999	1 year on honor wall
Pioneer	\$50,000 - \$99,999	1 year on honor wall
Ranger	\$100,000 and more	1 year on honor wall

3. **In Honor or Memoriam**

Amount of Donation

Gifts in honor/memory less than \$2,500
Gifts in honor/memory \$2,500 - \$9,999
Gifts in honor/memory \$10,000 and more

Duration of Recognition

1 year in honor register
1 year on honor wall
Annually on honor wall*

4. **Estate Gifts**

Amount of Donation

Realized legacy gifts less than \$2,500
Realized legacy gifts \$2,500 - \$9,999
Realized legacy gifts \$10,000 and more

Duration of Recognition

1 year in honor register
1 year on honor wall
Annually on honor wall*

5. **Corporations & Foundations**

Amount of Donation

Corporation/Foundation gifts less than \$5,000
Corporation/Foundation gifts \$5,000 and more

Duration of Recognition

1 year in honor register
1 year on honor wall

6. **All Others**

Amount of Donation

Legacy Society Members
Sequoia Society Members
Yosemite Conservancy Life Members
Galen Clark Society Members
Yosemite Conservancy Volunteers

Description

Planned Giving donors
Monthly donors
Yosemite Assn. status
Former Council members
All volunteers

Duration of Recognition

Annually in honor register*
Annually in honor register*
Annually in honor register*
Annually in honor register*
1 year in honor register

* In accordance with DO/RM #21, in-park donor recognition will never be considered permanent. Longer-term recognition will be reviewed annually for the honor wall and the honor register.

d) Endowed Positions and Programs

Occasionally NPS (educational, interpretive, research, recreational, youth, or other) positions and endowments may be named to recognize a gift made to support a program or position. (See DO#21, Section 4.2). The Director must approve specific naming opportunities before an offer can be made to a potential donor. Any naming must comply with all statutory and regulatory requirements. In addition, hiring individuals for endowed, named positions must follow all applicable employment laws and procedures.

This guidance does not apply to programs managed and funded solely by Yosemite Conservancy. Programs jointly funded and administered through the Conservancy and NPS will be addressed on a case-by-case basis within individual Philanthropic Partnership Agreements and Annual Work Plans.

e) Donor Recognition for Capital Campaigns and Restricted Projects

To provide appropriate recognition for donations given in support of specific projects or Capital Campaigns, the following recognition opportunities may be considered:

Short-term recognition: While projects are going through the fundraising, construction, and (for a limited time) project completion phases, temporary, on-site signs may be posted by Yosemite Conservancy to recognize donors involved in specific capital improvement/rehabilitation projects. This may include temporary construction signs identifying contributors to the project. The level of recognition will depend on the total cost and duration of the project and will be determined on a case-by-case basis.

Longer-term recognition: Recognition of contributions for major capital projects, including the preservation, rehabilitation, or construction of park buildings/structures or sites may be provided by donor recognition plaques, on-site donor boards, or other forms of recognition when circumstances warrant, as determined by the Superintendent. The duration and kind of on-site recognition (e.g. displaying a recognition plaque stating that the work done on the building was “made possible through a generous donation from XYZ”) will be described in a Campaign Recognition Plan for the capital project and approved by the Superintendent.

The temporary naming of rooms and interior spaces within non-historic park facilities is permitted only to recognize donations for the renovation of that room/facility or construction of a new facility. The renovation or rehabilitation of structures or historic or natural features may not be acknowledged through naming; this form of recognition may only be used for interior spaces. The NPS Director must approve naming opportunities before an offer can be made to a potential donor. Naming is limited to a period of 10 years but may be extended by the Director.

Benches and Interior Furnishings: At the discretion of the Superintendent and consistent with park needs, Yosemite Conservancy donations of benches and interior furnishings may be accepted. The Superintendent will determine the most appropriate location for the item. The donation will be acknowledged in writing and/or in the donor registry, however, there will be no recognition for the item on-site.

f) Credit Lines, Logos and Name

Sometimes a Yosemite Conservancy corporate or business donor will request that its name and/or logo be included as part of its recognition. Such recognition may be appropriate when it will appear as part of a credit line on printed or electronic material, audio/video/film products, and temporary exhibits, displays, or signs. Within Yosemite National Park, short, unobtrusive credit lines may be used to acknowledge donors on exhibits, displays, donor boards or walls, or other materials that are expected to endure for many years, but will not include logos. Marketing slogans and taglines will not appear under any circumstances.

g) Special Events

At the present time, Yosemite Conservancy hosts one major event each year for all donors of \$25 and more - Spring Gathering. The Superintendent may recognize business sponsors by limited use of logos and name on temporary event facilities, signs and literature at this special event with the understanding that the size, scale, scope and location of business logos and name will not dominate the event facility or area.

III. Recognition of Donations

Donations to Yosemite Conservancy for Yosemite National Park, or directly to the park when mutually agreed upon, will be acknowledged at the donor recognition site or other agreed upon locations for jointly sponsored projects. The type and duration of recognition will be approved by the Superintendent.

IV. Prohibited Recognition

a) Special Considerations

Donors will not receive special consideration regarding any law, regulation, or policy affecting public use of the park.

b) Endorsement

Acceptance of private support by Yosemite Conservancy or Yosemite National Park is not and should not be interpreted as an endorsement of that donor, or any product or programs associated with that donor. Federal employees are prohibited from using or permitting the use of their position, title, or authority to endorse any service, product, or enterprise. This prohibition does not prevent the park and Yosemite Conservancy from acknowledging the assistance provided by a donor and how that assistance has benefited the park. Employees will not appear in any corporate advertising or public relations materials without the approval of the Superintendent.

c) Natural, cultural, and recreational resources (trees, buildings, trails, roads, etc.)

Natural, cultural, and recreational resources of any kind will not be named for or in honor of an individual, organization, or business as a result of a financial contribution.

V. Corporate Support of National Parks

Corporate support is part of the long tradition of philanthropy and shared stewardship of the National Park System as well as individual parks. Yosemite Conservancy and Yosemite welcome and encourage such support and will follow the requirements pertaining to acceptance and recognition of corporate donations as in Sections 4, 5 and 8 of DO#21.

VI. Signatures

Frank Dean, President/CEO Yosemite Conservancy Date

Superintendent, Yosemite National Park Date

Regional Director, Pacific West Region Date