

DONOR RECOGNITION POLICY

1. DONOR RECOGNITION

The City of Shorewood seeks to recognize donors who wish to support the City's park system through distinguished effort or substantial gift.

This policy determines procedures for recognizing donated amenities or projects, also noted in this policy as a "Substantial Gift", found within Shorewood parks.

This policy covers fixed and/or indefinite periods of time.

For the purposes of this policy, "Substantial Gift" is defined as at least 50% of the estimated cost of:

- (a) new construction, remodeling, or renovation;
- (b) developing a new real property, i.e. park buildings, structures, real estate, etc.; or
- (c) replacement of an existing, unnamed facility or landmark that requires substantial renovation at the time of the gift.

Items found in this policy include park structures (pavilions, warming houses, shelters, plazas, etc); real estate to be used for parks, trails, or open space, interpretive areas, or active recreation; or other large-scale projects as discussed with the Park Commission and City Council.

2. DONORS AND DONATION

"Donors" or "Donation" as defined in this policy means a substantial financial contribution toward the cost of an amenity or project. This contribution is defined as at least 50% of the total estimated cost of stated amenity or project.

Recognition may be in honor of individuals, groups of individuals, or corporations.

- a) Donors or donor representatives must sign a donor agreement that delineates terms of the contributions, unless donor wishes to remain anonymous. The Donor Agreement will include the following:
 - (1) In the event of demolition of a structure, its recognition or any part of it shall be subject to new recommendations.

- (2) The style of recognizing structures and facilities should be consistent with the City's visual standards, and adhere to City ordinances.
- (3) The Director of Public Works or designated staff person is responsible for overseeing compliance with policy requirements, including completion of consultations and approvals, securing signatures on donation agreements by donor, donor representative, and City of Shorewood.
- (4) Groundbreaking, dedication, or other ceremonies relating to gifts, shall be reviewed by the Park Commission and approved by the City Council.
- (5) The City Council may rescind a donor's recognition for just cause.

**Method of donor recognition must be agreed upon and formally approved by City Council *prior to* signing the donor agreement.

- (b) The nature of the donation will assist in determining the type of recognition.
- (c) A plaque, or other negotiated signage, may be placed on a building, room, or facility to recognize a Donor. The design, wording, size, and location of the plaque require the approval of the City Council.
- (d) A donor recognition or memorial plate may be affixed to routine furniture items. The City shall specify the size and location of the donor plate and the donor will pay for the plate and engraving. The City shall approve the wording of the donor plate and affix the plate to the furniture.
- (e) Plaques or markers will not be placed for routine tree donations.
- (f) Donations of a routine nature (e.g., trees, park benches and other furniture) shall be reviewed and approved, if appropriate, by the Public Works Director and/or the Park Commission.
- (g) The donor shall pay for the delivery and installation of the amenity and/or donor recognition plaque or plate.
- (h) The option of funding the amenity for life of said amenity is negotiable and would require assurance of sufficient funding. There is no exclusive right to sole recognition in cases of expansion or other structural modifications.

Recognition carries no power of direction to the City on matters of schedule, design, furnishing, or priority of use.

3. PROCESS AND PROCEDURES FOR SUBMISSION OF PROPOSAL

Any proposal for recognition shall be made through a formal submission process to the Park Commission. The Park Commission will make a recommendation on the proposal to the City Council.

Proposals must have the written approval of the person or corporate representative for whom the recognition is to be given. If the person is deceased, the approval of the family or designated representative should be obtained. If the person is deceased and there is not family or a designated representative, recognition can proceed through the submission process.

Procedures governing approval of recognition proposals, of a non-routine nature, are set forth below and may also be supplemented by such operational guidelines as the City of Shorewood may adopt from time to time. Exceptions from policy requirements must be authorized by the City Council in advance of the donation.

- Step One** A Schematic design and details will be submitted to the City of Shorewood and shall include the following elements:
- (a) A scaled architectural drawing or plan drawn to scale to be completed by a landscape architect or civil engineer, registered in the State of Minnesota, and would include:
 1. site plan
 2. architectural details
 3. landscape plan
 4. tree preservation plan
 5. sign or memorial detail

Please note: The Schematic design phase of the submission process will be overseen by the appropriate departments of the City of Shorewood according to established procedure.

Proposed recognition should be designated at the time of submission of schematic design, as found in Step One, a5. Recognition may not be allowed after the amenity is operational except by Council review and approval.

Step Two: After submission of the schematic design, the individual, group, or corporation will formally present their request to the Park Commission. The Park Commission will then make a recommendation to City Council.

Step Three: Upon approval by City Council, the Donor Agreement will be signed and kept on record with the City of Shorewood.

5. METHOD OF PAYMENT AND RESPONSIBILITIES OF DONATION

Donation associated with recognition proposals can be made by the donor with financial assurity or cash escrow for the full amount of the donation and shall be submitted to the City prior to the commencement of construction of amenity or project.

Individual donors may gift a portion of their contribution through an irrevocable trust or a contractual bequest mechanism.

Should the donor renege on any payment once the project has commenced and the donor agreement has been signed, the City shall be allowed to keep any portion of the donation already paid, and recognition shall not apply.

Should the City fail to use the funds for the stated purpose in the Donor Agreement, the funds shall be returned to the donor.

6. NAMING

The City of Shorewood will commemorate long-term service to the community or to a distinguished person, and such recognition is contingent upon Council review and approval.

The City of Shorewood will consider naming opportunities for outstanding contributions, such as a parcel of land or new donation outside the geographic confines of the existing park system.

The City prefers not to name facilities within its park system that are made possible with donations.

Naming a building in honor of a person who has given extraordinary distinguished service to the city will not normally be considered until after his/her substantive formal relationship with the city has ended.

The name used should normally be the family name, or in the case of a corporate entity, the shortest possible name. Unless the City Council determines otherwise, a name may be used only once.

7. STEWARDSHIP

Stewardship requires that the City of Shorewood honor the expectations of donors and abide by gift agreements, including recognition provisions. Recognition is generally expected to last the lifetime of the building, facility, unit, program, or other endeavor. There may nonetheless be extraordinary circumstances that justify cessation of the use of a recognition, or "renewed recognition," such as change in use, substantial renovation, or demolition of an existing building, facility, or part thereof, major programmatic changes,

failure of a donor to meet the financial commitment of the donor agreement, or other situations unforeseeable at the time of the original recognition. In all cases, the City Council must approve the renewed recognition.

The City of Shorewood sincerely wishes to thank all donors for contributions made to the City.