



## SWE HQ Gift Acceptance Policy

The Society of Women Engineers (SWE) mission is supported by our members and sustained by the financial support from organizations and individuals who endorse SWE's mission and objectives. Individual donors may choose to designate their contribution to support a particular programmatic area or designate the contribution as unrestricted. This Gift Acceptance Policy serves as a guideline for accepting gifts into the accounts of the Society of Women Engineers.

### SWE Donation Direction Policy

Individuals may donate to any areas listed as donation options on the [swe.org/donate](https://www.swe.org/donate) page or under the Gifts Accepted section. All donations support the mission of SWE and the specific areas the donor has selected. Funds donated to SWE cannot be returned. SWE cannot accept instructions for the particular use of any donation from donors unless said instructions are associated with a planned giving commitment fulfillment and estate gift.

### Gifts Accepted

#### Cash and Other Forms Readily Convertible to Cash

SWE HQ accepts cash gifts through cash, checks, or credit cards. Funds without a designation will be considered an unrestricted general contribution.

#### Matching Gifts and Employee Giving

Many corporations offer matching gift programs for donations or in honor of an employee's volunteer efforts. Donors should contact their Human Resources (HR) Department about eligibility and terms and conditions. Typically, matched donations should go through the company donation platform. Matching forms and pledges should be submitted to SWE HQ for processing and record-keeping.

Matching gifts processed through a donation platform (e.g., Benevity, YourCause) will receive an automated tax receipt. Donors should contact the donation platform used to obtain tax receipts.

#### Non-Endowed Scholarships

Donors may designate their gifts towards a non-endowed scholarship fund. Scholarship funds include the general scholarship fund or section scholarships.

Donors may choose to contact the Fund Development team before they make their donation if they choose to donate to SWE's General Scholarship Fund which is not an endowed scholarship listed on the donation site. Donors can also designate (if they're making a payment via check or a matching gift) to the General Scholarship Fund.

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Section scholarships are typically endowed and managed by the SWE Board of Trustees. Donors are recommended to directly reach out to the SWE section for inquiries on supporting these endowed scholarships.

### **Life Membership**

Life Membership is available with a donation of \$2,000\* either through a matching gift or on SWE's donation site. All funds are managed by the SWE Endowment Fund, Inc. (SWE-EFI) to provide funding for SWE in the future. Donors can make a commitment through three plans:

- Plan A: \$2,000 payable when the contract is signed.
- Plan B: Readily marketable securities with a minimum value of the entire Life Membership contract payable when the contract is signed.
- Plan C: Three-year contract - \$500 payable in cash when the contract is signed and \$500 payable in the case on the three following contract anniversary dates.

Many companies will match memberships for professional societies. Donors should contact their HR Department about eligibility and terms and conditions.

\*Or current rate at the time of initial contribution

### **Planned Gifts and Estate Plans**

Making a planned gift to SWE can help ensure future generations of engineers receive the resources they need to succeed and leave a legacy for women in engineering. SWE will honor planned gift donors as an Ada Pressman Society member. Planned and Estate gifts fall into two categories:

- SWE HQ manages traditional donations for programmatic operations and non-endowed scholarships. Gifts to SWE funds may support a designated fund or be unrestricted, so they are used where it's most needed.
- SWE-EFI manages all endowed scholarships. When an endowed scholarship is established, the principal is generally maintained, and the investment earnings are used to grant yearly awards, which means an endowment can last indefinitely.

Donors can bequeath a specific amount or a portion of what remains of your will after other obligations have been fulfilled. Donors may designate their bequest to where it is needed most or to a specific program. SWE recommends that donors consult their legal tax advisor before making a planned gift.

### **Gifts Not Currently Accepted**

Real Estate - Gifts of real estate and timeshares are not accepted.

Tangible Personal Property - Gifts of personal property (such as artwork, collections, vehicles, or antiques) are not accepted.

Privately Held Securities - Gifts of stock in privately held companies are not accepted unless they are readily marketable.

## Recognition and Official Tax Documentation

Regardless of size, all contributions made directly to SWE HQ receive a donation acknowledge receipt suitable for tax purposes. All gifts of \$100 or more will receive acknowledgment in SWE's Annual Report. SWE will honor requests and accept donations who wish to remain anonymous.

## Ethical Gift Acceptance

When considering whether to solicit or accept gifts, SWE will consider the following ethical factors:

- [Alignment with Values](#) – the gift shall not compromise any of the core values of SWE.
- Agreement – the gift shall be compatible between the intent of the donor and SWE's use of the gift.
- Public Relationships – the gift shall not damage or disparage the name or reputation of the Society.
- Primary Benefit – the gift shall firstly benefit SWE versus solely the donor.
- Consistency with Donor Practices – the gift shall be consistent with prior policies and best practices.
- Form of Gift – the gift shall be in a form that SWE can use without incurring substantial expense or difficulty.
- Future Giving Impact – the gift shall not discourage future gift-giving or compromise SWE's fundraising efforts.

## Donor Bill of Rights

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

1. To be informed of the organization's mission, the way the organization intends to use donated resources, and its capacity to use donations effectively for their intended purposes.
2. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
3. To have access to the organization's most recent financial statements.
4. To be assured their gifts will be used for the purposes for which they were given.
5. To receive appropriate acknowledgment and recognition.

6. To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.
7. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
8. To be informed whether those seeking donations are volunteers, employees of the organization, or hired solicitors.
9. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
10. To feel free to ask questions when making a donation and to receive prompt, truthful, and forthright answers.

DEVELOPED BY American Association of Fundraising Counsel (AAFRC), Association for Healthcare Philanthropy (AHP), Council for Advancement and Support of Education (CASE), and the Association of Fundraising Professionals (AFP).