

Donor Guidelines

Donor Engagement and Recognition

Allen Institute Responsibilities

Any individual authorized to solicit support for the Allen Institute will:

- Be advised of and adhere to the provisions of the Gift Acceptance Policy and other relevant Allen Institute policies and state and federal laws and regulations
- Act with transparency, fairness, integrity and in accordance with applicable laws
- Adhere to the provision of applicable professional codes of ethics and standards of practice
- Cease solicitation from a current or prospective donor on request
- Disclose immediately to the Executive Director of Global Partnerships & Philanthropy, General Counsel or Deputy General Counsel any potential, actual, perceived or alleged conflict of interest

Donor Expectations

Donors and prospective donors can expect:

- To be kept informed about the priorities and strategic aims of the Allen Institute
- That the Allen Institute will fulfil the intended purpose of their donation
- That support given for a specific purpose will be used for that purpose
- To be informed of the impact of their donation
- To have their donation/gift acknowledged in a timely manner, and where appropriate to be recognized publicly, in consultation with the Allen Institute, or to remain anonymous if requested (anonymity must be requested in writing*)
- For cash donations, acknowledgement will include a formal letter upon receipt of the donation.
- The Allen Institute will not provide legal or tax advice to supporters, nor guarantee whether support will be deductible for a particular supporter. We encourage all prospective donors to seek the assistance of personal legal, tax and financial advisors in matters relating to their support and the resulting tax and estate planning consequences. It is the donor's responsibility to secure a qualified appraisal, as required by federal tax law, and independent legal counsel for all support made to the Allen Institute, at their expense.
- To have their right to privacy respected
- The Allen Institute will keep all information about donors and prospective donors, including their names, and the nature and amounts of their donations, strictly confidential unless the donor grants permission or otherwise legally required
- To have their questions relating to their donations, or any future donations, answered in a timely and transparent manner

Documentation:

All donations, gifts and pledges must be documented with a written gift instrument (gift agreement, memorandum, commitment form, or other written documentation). Documentation will include a description, detail the purpose of the support, type of fund, payment schedule, stewardship/reporting and recognition details. Any restrictions relating to the support will be detailed in the document. There are additional specific gift agreement requirements for new endowed support, support that confers special naming (recognition), complex support, planned/deferred support, and support above a certain threshold.

Complaints

The Allen Institute will respond promptly to a complaint by a donor or prospective donor about any matter which is addressed in this policy.

A designated member of the Global Partnerships & Philanthropy team will attempt to satisfy the complainant's concern in the first instance.

A complainant who remains dissatisfied may request in writing a review of their complaint by the Chief Operating Officer of the Allen Institute, or their nominee, and will be advised of the outcome of this review in writing.

* No fully anonymous gift or support for which the purpose cannot be disclosed can be accepted by the Allen Institute. The donor's identity must be disclosed to President & CEO, along with the Executive Director of Global Partnerships & Philanthropy, and appropriate financial staff, who shall endeavor to maintain the supporter's anonymity to the extent allowed by law.