



Donor Recognition and Reporting Plan

Kenneth Avenue Community Habitat Demonstration Project

Community Habitat Programs Inc.

Project Location: 872–872½ Kenneth Avenue, New Kensington, Pennsylvania 15068

1. Purpose

Community Habitat Programs Inc. is committed to recognizing the generosity of donors while maintaining transparency, accountability, and responsible stewardship of all contributed funds.

This Donor Recognition and Reporting Plan establishes the procedures that will be used to acknowledge, recognize, document, and report contributions supporting the rehabilitation and repurposing of the two residential properties located at 872–872½ Kenneth Avenue in New Kensington, Pennsylvania.

The plan is intended to assure donors that their support will be used responsibly and that project progress, expenditures, challenges, and measurable outcomes will be communicated in a timely and professional manner.

2. Guiding Principles

Community Habitat Programs Inc. will administer donor recognition and reporting according to the following principles:

- **Accountability:** Contributions will be tracked and used for approved charitable and project-related purposes.
- **Transparency:** Donors will receive clear information regarding the use of funds and the status of the project.
- **Accuracy:** Public recognition and donor reports will accurately describe the donor's contribution and the project's progress.
- **Privacy:** Donors may request anonymous or confidential recognition.
- **Consistency:** Donors at comparable contribution levels will receive substantially similar recognition opportunities.
- **Respect:** All recognition will reflect the donor's stated preferences and will not be used in a way that implies endorsement beyond the scope of the contribution.



- **Community Benefit:** Recognition activities will remain consistent with the charitable mission of Community Habitat Programs Inc.

3. Eligible Forms of Support

Recognition may be provided for the following types of support:

- Cash contributions;
- Foundation or corporate grants;
- Matching gifts;
- Challenge grants;
- Donated construction materials or equipment;
- Professional services provided without charge or at a substantially reduced cost;
- Volunteer labor;
- Property-related services;
- Sponsorship of a specific rehabilitation phase; and
- Other in-kind contributions accepted by Community Habitat Programs Inc.

The value assigned to an in-kind contribution will be documented using donor-provided information, invoices, market estimates, or other reasonable supporting documentation. Community Habitat Programs Inc. will not provide a tax valuation for donated property or professional services beyond what is permitted by law.

4. Donor Recognition Levels

Recognition will be based on the amount or documented value of the contribution. Recognition levels may be adjusted when necessary to reflect project size, donor preference, or the nature of an in-kind contribution.

Community Supporter

Contribution of up to \$999

Recognition may include:

- Written acknowledgment and charitable contribution receipt;



- Listing on the project donor webpage or annual donor list, unless anonymity is requested;
- Inclusion in selected project updates; and
- Invitation to public project events, when applicable.

Neighborhood Partner

Contribution of \$1,000 to \$4,999

Recognition may include:

- All Community Supporter benefits;
- Recognition in the project completion report;
- Inclusion in selected social media or newsletter acknowledgments;
- Invitation to project milestones or community events; and
- Electronic copies of before-and-after project photographs.

Rehabilitation Sponsor

Contribution of \$5,000 to \$14,999

Recognition may include:

- All Neighborhood Partner benefits;
- Recognition in project-related presentations and selected printed materials;
- Acknowledgment in a project milestone announcement;
- Semiannual written progress reports;
- Invitation to participate in a project visit, subject to safety and scheduling requirements; and
- Recognition as a sponsor of a rehabilitation activity, where appropriate.

Community Renewal Partner

Contribution of \$15,000 to \$49,999

Recognition may include:



- All Rehabilitation Sponsor benefits;
- Prominent recognition in the final project report;
- Recognition on a temporary project sign, where permitted and approved;
- Quarterly project updates;
- Opportunity to sponsor a specific project phase or major improvement;
- Invitation to a private project briefing; and
- Recognition at the project completion or dedication event.

Demonstration Project Leadership Partner

Contribution of \$50,000 or more

Recognition may include:

- All Community Renewal Partner benefits;
- Recognition as a lead supporter of the Kenneth Avenue Demonstration Project;
- Prominent placement in approved project materials, reports, presentations, and website content;
- Customized quarterly financial and performance reports;
- Opportunity to participate in a project launch, milestone announcement, or completion event;
- Recognition in media releases, subject to donor approval;
- Opportunity to receive an executive-level project briefing;
- Acknowledgment in materials describing the project as a model for future neighborhood revitalization efforts; and
- A customized recognition arrangement approved by both the donor and Community Habitat Programs Inc.

5. Naming and Sponsorship Opportunities



Subject to approval by the Board of Directors, applicable laws, municipal requirements, property restrictions, and donor preference, certain project elements may be associated with a donor or sponsoring organization.

Potential sponsorship opportunities may include:

- Property cleanout and site preparation;
- Roof replacement;
- Electrical or plumbing rehabilitation;
- Heating and energy-efficiency improvements;
- Kitchen or bathroom rehabilitation;
- Exterior improvement and landscaping;
- Safety and accessibility upgrades;
- Resident support services;
- Project documentation and evaluation; or
- The overall Kenneth Avenue Demonstration Project.

Naming recognition will not convey ownership, control, or permanent rights in the property. Any naming opportunity will be documented in a written agreement stating the recognition period, approved wording, location, and conditions under which recognition may be modified or discontinued.

Community Habitat Programs Inc. reserves the right to decline or remove recognition when continued association would conflict with the organization's mission, legal obligations, charitable status, or reputation.

6. Donor Preference and Privacy

Each donor may select one of the following recognition preferences:

- Public recognition using the donor's full name;
- Public recognition using a business, foundation, or family name;
- Limited recognition in selected reports or events;
- Anonymous recognition;



- No public recognition; or
- Recognition wording approved in advance by the donor.

Community Habitat Programs Inc. will not publicly disclose a donor's mailing address, email address, telephone number, private financial information, or other confidential information without authorization.

The organization may disclose donor information when required by law, governmental reporting requirements, an audit, or a legally valid request.

7. Contribution Acknowledgment

Community Habitat Programs Inc. will provide a written acknowledgment for qualifying contributions.

The acknowledgment will generally include:

- The donor's name;
- The date of the contribution;
- The amount of a cash contribution;
- A description, but generally not a valuation, of donated goods or property;
- A statement indicating whether goods or services were provided in exchange for the contribution;
- The charitable purpose of the contribution; and
- The organization's legal name and contact information.

Acknowledgment letters or receipts will be issued within 15 business days after the contribution is received and properly recorded.

Special grant acknowledgment requirements will be followed when established by a foundation, corporation, government agency, or other institutional donor.

8. Use and Tracking of Donated Funds

Contributions designated for the Kenneth Avenue Demonstration Project will be recorded and tracked through the organization's financial management system.

Project-related expenses may include:



- Property acquisition or closing expenses, when applicable;
- Property cleanout and debris removal;
- Environmental, structural, and property-condition assessments;
- Surveying and property boundary work;
- Subdivision, title separation, legal, and recording expenses;
- Architectural and engineering services;
- Permits, inspections, and municipal fees;
- Construction labor and materials;
- Roofing, electrical, plumbing, heating, and structural work;
- Interior and exterior rehabilitation;
- Energy-efficiency, safety, and accessibility improvements;
- Property security and maintenance;
- Insurance;
- Project management;
- Resident preparation or support services;
- Community engagement;
- Program evaluation;
- Donor reporting; and
- Reasonable administrative costs necessary to complete and oversee the project.

Funds will not be intentionally used for materially different purposes without donor authorization when the contribution is subject to a written restriction.

9. Reporting Schedule

Reporting will be proportionate to the amount and nature of the contribution.

Initial Contribution Report

Within approximately 30 days after receipt of a major contribution, the donor may receive:



- Confirmation that the contribution was received;
- The approved use of funds;
- A preliminary project schedule;
- The project budget or relevant budget summary;
- Current project status; and
- Contact information for the project representative.

Quarterly Reports

Leadership and major project partners may receive quarterly reports that include:

- Work completed during the reporting period;
- Project milestones achieved;
- Funds received and expended;
- Budget-to-actual comparisons;
- Photographs or visual documentation;
- Permitting, title, construction, or municipal developments;
- Challenges, delays, or material changes;
- Corrective actions being taken; and
- Work planned for the next reporting period.

Semiannual Reports

Other qualifying sponsors may receive semiannual reports summarizing:

- Rehabilitation progress;
- Major expenditures;
- Community engagement activities;
- Project risks and responses;
- Anticipated next steps; and



- Updated completion expectations.

Final Project Report

A final report will ordinarily be issued within 60 to 90 days following substantial completion of the project or the conclusion of the funded activity.

The final report may include:

- A summary of the project;
- The original objectives;
- Work completed;
- Final or substantially final project expenditures;
- Sources and uses of funds;
- Before-and-after photographs;
- Measurable outputs and outcomes;
- Challenges encountered;
- Lessons learned;
- Community impact;
- Plans for occupancy, continued use, or property stewardship;
- Recognition of participating donors and partners; and
- Recommendations for replicating the demonstration project.

10. Financial Reporting

Financial reports provided to major donors may include:

- Approved project budget;
- Contributions received;
- Expenditures by major category;
- Outstanding obligations;
- Remaining project funds;



- Variances from budget;
- Explanation of material variances; and
- Anticipated future expenditures.

Material changes to the project budget, timeline, or intended use of restricted funds will be communicated to affected donors as soon as reasonably practical.

Financial reporting will be based on the organization's accounting records and available supporting documentation. Reports may be subject to adjustment as invoices, reimbursements, contracts, or final costs are processed.

11. Performance Measures

Community Habitat Programs Inc. intends to track the following project indicators:

- Number of properties cleaned out;
- Number of residential units assessed;
- Number of residential units rehabilitated;
- Number of health and safety conditions corrected;
- Number of code-related deficiencies addressed;
- Progress toward separating the title and property boundaries;
- Amount of donor and partner funding leveraged;
- Value of in-kind contributions;
- Number of contractors, volunteers, and community partners engaged;
- Improvement in the exterior condition of the project site;
- Number of future residents or households expected to benefit;
- Completion of a documented model for future rehabilitation projects; and
- Progress toward returning the properties to productive housing use.

Not all outcomes are fully within the organization's control. Reporting will distinguish between completed activities, anticipated outcomes, and longer-term community impacts.



12. Project Photographs and Communications

Before, during, and after photographs may be used to document project conditions and progress.

Photographs may be included in:

- Donor reports;
- Grant reports;
- The organization's website;
- Social media;
- Newsletters;
- Community presentations;
- Media announcements; and
- Fundraising materials.

Images identifying residents or other private individuals will be used only when appropriate consent has been obtained.

Major donors may request advance review of materials that use their name, logo, quotation, or likeness. Use of a donor's trademark or logo will require permission and compliance with any applicable branding guidelines.

13. Site Visits and Project Events

Major donors and project partners may be invited to participate in:

- Project briefings;
- Property tours;
- Volunteer days;
- Construction milestones;
- Community meetings;
- Project completion events; and
- Dedication or recognition ceremonies.



All site visits will be subject to safety requirements, insurance restrictions, contractor schedules, property conditions, and applicable laws.

Visitors may be required to sign waivers, wear protective equipment, or comply with contractor and project-manager instructions.

14. Recognition Through Public Communications

With donor approval, Community Habitat Programs Inc. may recognize support through:

- Website acknowledgments;
- Social media posts;
- Electronic newsletters;
- Annual reports;
- Press releases;
- Project signage;
- Event programs;
- Presentations;
- Donor honor rolls; and
- Community impact reports.

Public recognition will describe the contribution accurately and will not state or imply that the donor has legal responsibility for the project, controls the organization, or endorses all organizational activities.

15. Recognition of Anonymous Donors

Anonymous contributions may be recognized using wording such as:

- “Anonymous Community Partner”;
- “A Friend of New Kensington”;
- “Anonymous Rehabilitation Sponsor”;
- “A Private Foundation Partner”; or
- No acknowledgment, as requested.



The identity of an anonymous donor will be disclosed internally only to those individuals who require the information for accounting, legal, compliance, grant administration, or governance purposes.

16. Unused or Remaining Funds

When restricted funds remain after the funded work has been completed, Community Habitat Programs Inc. will evaluate the amount, donor agreement, applicable law, and remaining project needs.

Subject to donor restrictions, remaining funds may be used for:

- Additional rehabilitation work at the Kenneth Avenue properties;
- Property maintenance and security;
- Resident support;
- Compliance or closeout expenses;
- Evaluation and reporting;
- Related neighborhood revitalization activities; or
- A substantially similar charitable housing project.

When required by the donor agreement, the organization will request written donor authorization before redirecting material unused funds.

17. Project Delays or Changes

Rehabilitation projects may be affected by property conditions, weather, contractor availability, permitting, title matters, municipal requirements, environmental findings, material costs, or other circumstances.

When a material delay or change occurs, major donors will be informed of:

- The nature of the issue;
- The expected effect on cost, scope, or timing;
- Steps being taken to address the issue;
- Any proposed modification to the project plan; and
- Whether donor approval is required.



Community Habitat Programs Inc. will not guarantee a specific completion date unless expressly stated in a written agreement.

18. Donor Stewardship Contact

Donors will be provided with a designated organizational contact for questions regarding:

- Contribution acknowledgment;
- Project progress;
- Financial reporting;
- Recognition preferences;
- Site visits;
- Grant requirements; and
- Final reporting.

Primary Contact:

Trevor G. McKenzie

Executive Director

Community Habitat Programs Inc.

[Telephone Number]

[Email Address]

www.communityhabitatprograms.org

19. Record Retention

Community Habitat Programs Inc. will maintain donor and project records in accordance with applicable legal, accounting, tax, grant, and organizational requirements.

Records may include:

- Contribution acknowledgments;
- Donor agreements;
- Grant documents;
- Recognition preferences;
- Invoices and receipts;



- Contracts;
- Financial reports;
- Progress reports;
- Photographs;
- Permits and inspection records; and
- Final project documentation.

Access to donor records will be limited to authorized persons.

20. Approval and Administration

This Donor Recognition and Reporting Plan will be administered by the Executive Director under the oversight of the Board of Directors of Community Habitat Programs Inc.

The organization may revise this plan when necessary to reflect changes in the project, donor requirements, applicable law, nonprofit best practices, or organizational policies.

Any donor-specific commitment that differs materially from this plan should be documented in a written grant, sponsorship, contribution, or recognition agreement.

Approved by:

Community Habitat Programs Inc. Board of Directors

Effective Date: [Date]

Authorized Signature: _____

Name and Title: _____

Date: _____