



Donor Stewardship & Recognition Policy

Purpose

- To thank and honour our donors.
- To build lasting relationships with donors inviting further contributions and providing reciprocal positive exposure for their philanthropy.
- To encourage and excite others. By publicly recognizing gifts, other potential donors will realize the level of support the CFGW receives. They may be encouraged to join in the giving. Also, this often serves to raise people's awareness of giving and raise their own standards.
- To create a community spirit. As the donor begins to be recognized or as people note the number of donors who support the CFGW, it is a source of pride for us all – an indication of the community's willingness to support the CFGW

Gift Acknowledgement

The Children's Foundation staff will work to acknowledge every gift within the following guidelines. At any time, a donor may request additional public recognition or decline public recognition.

Gifts of \$20 - \$999

- Thank you letter and Income Tax receipt if applicable for gifts over \$20 will be issued within 10 business days. Donations made online will receive email acknowledgement. All thank you letters will be signed by the Executive Director.

Gifts of \$1,000 - \$9,999

- Thank you letter and Income Tax receipt if applicable will be issued within 10 business days and will include a handwritten note from the Executive Director or the staff member who has the direct relationship with the donor. All thank you letters will be signed by the Executive Director.
- Phone call of thanks from a CFGW Board Member will be made within one month of the donation.
- For donations that are not eligible for tax receipts or for donations made online where email tax receipts are issued, handwritten thank you cards from the Executive Director or the staff member who has the direct relationship with the donor will be sent within ten business days.

Gifts over \$10,000

In addition to the recognition included in the previous category:

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- Donors will be featured in a News (Extra! Extra!) story on the CFGW website within 30 days of the donation. The story will also be featured in the Beacon Newsletter within 6 months of the donation.
- If the donor chooses to, the CFGW will submit a press release including a photographed cheque presentation to local media.

Donor Stewardship

We are happy to communicate the impact of your donation. These stories are shared with our donors via:

- Our website's Sunshine Stories
- Our monthly eNewsletter "The Beacon"
- Social Media
- For donations of \$1,000 or more, donors will be personally emailed with follow up information of how their donation is being used six months following the donation.

Donor Recognition

The CFGW will acknowledge gifts at the time of donation and will also keep records of overall donor contributions and place donors in the appropriate recognition level once they achieve that overall amount. These levels are: Friend (\$1,000+), Partner (\$10,000+), Champion (\$25,000+), Visionary (+\$50,000), Benefactor (+\$100,000). See Appendix A for a list of eligible gifts.

Friend (\$1,000+ and who continue to actively support the organization)

- Mailed annual report.

Partner (\$10,000+)

- Name recognition on the Partner section of the CFGW Website Donor Hall of Fame
- Mailed annual report.

Champion (\$25,000+)

- Name recognition on the Champion section of the CFGW Website Donor Hall of Fame with a link to a featured Supporter Profile.
- Mailed annual report.

During the year that the donor enters the Champion Level:

- Champion Level welcome letter from a CFGW representative.

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- Mention of entry to the Champion Level in the program at the Around the World Gala.

Visionary (+\$50,000)

- Name recognition on the Visionary section of the CFGW Website Donor Hall of Fame with a link to a featured Supporter Profile.
- Mailed annual report.

During the year that the donor enters the Visionary Level:

- Champion Level welcome letter from a CFGW representative.
- A commemorative plaque presented at the Around the World Gala.
- Featured profile in The Beacon, the Children's Foundation eNewsletter.
- Invitation for two (2) the Annual Around the World with the Children's Foundation Gala

Benefactor (+\$100,000).

- Name recognition on the Benefactor section of the CFGW Website Donor Hall of Fame with a link to a featured Supporter Profile.
- Mailed annual report.

During the year that the donor enters the Benefactor Level:

- Champion Level welcome lunch with a CFGW representative.
- A commemorative plaque presented at the Around the World Gala.
- Name featured on the Annual Report.
- Featured profile in The Beacon, the Children's Foundation eNewsletter.
- Invitation for four (4) to the Annual Around the World with the Children's Foundation Gala

Responsibilities

All donor recognition administration will be the responsibility of the CFGW Staff. Forms of individual or group recognition, such as certificates, plaques, personal visits, or letters of appreciation, shall be the administrative responsibility of the CFGW Staff. The CFGW pays for donor recognition.

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Other Considerations

Anonymity

Donors wishing to remain anonymous will be respected; however, donors must indicate their wish to remain anonymous at the time of donation.

Donation Value

Prior to 2007, gifts to the CFGW were recorded manually. Because of this the CFGW can only confirm cumulative donation values from January 1, 2007 forward.

The current Donor Recognition Policy will take effect January 1, 2010. Gifts made following that date, will receive the proper Gift Acknowledgement within 60 days. Cumulative Donation values will be reviewed on an annual basis and the appropriate recognition will begin at that time.

Withdrawal or Refusal of Recognition

The Board of Directors reserves the right to withdraw recognition and naming agreements should such withdrawal be deemed in the best interests of the CFGW.

In addition, the Board of Directors (or their designate) must approve recognition wording, and may refuse the recognition opportunity should the CFGW and the donor be unable to agree on appropriate wording.

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Appendix A: Eligible Gifts

For the purposes of these guidelines, the following types of gifts are deemed to warrant recognition consistent with approved policy:

- Outright gifts of cash
- Gifts-in-kind and Gifts of Appreciated Property
- Gifts of Life Insurance
 - Proceeds received on an insurance policy as a benefit paid on the death of a donor [note: proceeds may not qualify for charitable receipt but will qualify for recognition purposes"]
 - Premiums paid periodically by a donor to the CFGW to maintain a policy in force [where the CFGW is the named beneficiary]
 - Outright gifts of existing policies with accumulated "cash value" for which a charitable gift receipt is issued.
- Other Irrevocable Planned Gifts
 - Planned gifts, usually derived from a donor's capital assets [or "wealth"], rather than income, are recognized as a gift at the "fair market value" of the asset[s] on the day that legal transfer of ownership to the CFGW has been completed, providing that the terms of any applicable agreement identify the institution as an irrevocable recipient of the gift. Such arrangements may include annuity contracts, charitable remainder trust agreements, and gifts of residual interest.
 - Under this policy, such gifts will receive credit for recognition purposes based on the actual value of the contribution when received by the CFGW. [Example: A contribution of \$50,000 to fund a gift annuity will be credited for recognition purposes as a gift of \$50,000 even though the charitable receipt will be issued for a lesser amount].
- Bequests by Will
 - Bequests are recognized in the name of the estate when they are actually received by the CFGW, not at the time they are described in the will of a prospective donor.
- Gift Pledges

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- Gift contributions to the CFGW may be “pledged” over a period of time [often over a number of years, depending on the size of the gift and the nature of the appeal]. Payments made on a gift pledge will be recognized when received. The total amount of the pledge itself will be recognized only in the year that the final payment is received.
- Special Events
 - Cash and gifts-in kind contributed through special events are included on the cumulative donor recognition program process.

Jan Craig

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