

Donor Recognition Practice Guidelines

Foundry

Item	Donor Recognition Practice Guidelines
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Created by	Principal, Fund Development, Foundry
Reviewed by	Executive Director, Foundry Director, Donor Relations, St. Paul's Foundation Director, Graham Boeckh Foundation Executive Director, InnerChange Foundation Foundry Lead Agencies: Abbotsford Community Services, CMHA Kelowna, John Howard Society of North Island, Vancouver Coastal Health, and YMCA of Prince George (Granville Youth Health Centre captured by St. Paul's Foundation)
Also see	Foundry Prospect Management Practice Guidelines
Revised	January 2017 (to reflect Foundry brand) November 2017 (to include Foundry's online resources)

I. PURPOSE

The purpose of these Donor Recognition Practice Guidelines is to ensure Foundry's central office and its partners appropriately and equitably thank, recognize, and steward donors to Foundry and its centres. Our coordinated donor recognition efforts will ensure donors feel informed about, engaged with, and inspired by their giving; and may encourage them to make future donations. In doing so, it will maximize our ability to achieve Foundry's vision of improving access to mental health, substance use and primary care for youth and young adults across BC.

II. DEFINITIONS:

For the purposes of this document, the following definitions will apply:

- **FCO:** the Foundry central office.
- **Lead Agency:** the lead agency hosting a Foundry local centre.
- **Founders:** refers to one of the four original non-government parties to the Collaboration Agreement signed October 2015: InnerChange Foundation, St. Paul's Foundation, Graham Boeckh Foundation, and the Michael Smith Foundation for Health Research.
- **Agency Fundraising Organization (AFO):** an organization that partners with a Lead Agency to raise funds for their local Foundry centre; may include for example a hospital foundation or the local chapter of a national nonprofit.
- **Partners:** refers collectively to all organizations involved in fundraising for any aspect of Foundry. This includes, but is not limited to, Founders, Lead Agencies, and AFOs.

- **Donation:** a single-payment gift, cumulative annual or lifetime giving, a written pledge to be paid over time, or a documented planned gift. Typically refers to cash gifts, though extraordinary in-kind contributions may be considered.
- **Donor:** person or organization who has made a Donation to Foundry through its Partners.
- **Donor Recognition:** all Donor recognition types and vehicles, including naming of physical space, programs and positions; branding; communications including web-based; events; thank-you processes, etc.
- **Naming Recognition:** the naming of a physical space, object, program or other entity after a Donor (e.g. the John Smith Resource Room).
- **Signage Recognition:** includes listing of Donor Recognition wording (e.g. names) on a Donor wall or website, placement of a plaque or marker, or other vehicles that may involve a Donor's name, but are not Naming Recognition.

III. **PRINCIPLES:**

These Practice Guidelines have been designed to ensure Donor Recognition related to Foundry:

- reflects, and helps to advance, the Foundry vision, mission and values;
- is meaningful for Donors;
- advances relationships with Donors;
- creates opportunities for resource development and growth;
- is as consistent and as equitable as possible;
- aligns with and supports the overarching Foundry branding and communications strategy; and
- cultivates a culture of philanthropy within and amongst communities impacted by Foundry.

IV. **NOTE:**

1. The FCO understands and acknowledges that its Partners may each have their own Donor Recognition Policies in place, and that they may vary between organizations and communities. If anything outlined in this document does not support an organization's fundraising needs, the organization is invited to contact the FCO to jointly identify a solution.

V. **GENERAL:**

1. Due to the important role brand awareness will play in the success of Foundry, Naming Recognition is not available for the overall Foundry, nor for its local centres. It is available for spaces and activities that are part of the Foundry or its local centres.
 - a. Spaces within facilities or activities supported by Donations may be named after a Donor, or a third party at the wish of a Donor, provided that the Donation represents a significant part of the cost or is regarded as central to the completion of the facility or activity.

- b. Naming associated with a particular space or activity will not preclude further naming opportunities within or related to that space or activity.
2. Foundry Central has established minimum Donation thresholds for Donor Recognition available through Foundry Central. Foundry Central will work with Lead Agencies to develop minimum Donation thresholds for their local centres. While some consistency is desired, these thresholds may vary between communities.
3. Donor Recognition may also be subject to:
 - a. The Income Tax Act and Canada Revenue Agency guidelines;
 - b. The Province of BC's Naming Privileges Policy; and/or
 - c. Naming or Donor Recognition policies of Partners.
4. When Donor Recognition has been offered and approved, it will be honoured in accordance with the agreement that was entered into. In the event of changed circumstances, such as a renovation to a space, Foundry Central is available to consult, if needed, with the Donor and relevant Partners, to determine a suitable alternative.
5. Foundry Central and its Partners reserve the right to decline or revoke Donor Recognition if it has reasonable concern about impact to their brand or reputation.
6. Donors may choose their preferred recognition wording. They may use their own names, their business name, or may wish to celebrate a life or honour a loved one. *(For example: ABC Corporation; John and Jane Smith; In Honour of Jennifer Smith; or In Memory of Jason Smith.)*
7. To avoid the appearance of advertising, corporate logos will not be used for Donor Recognition purposes on buildings or signs, unless approved by the Executive Director of the FCO.
8. Consideration should always be given to the longevity of Naming or Signage Recognition: for example, for the life of a lease, the duration of a program, or to anticipate future fundraising needs. Except for in exceptional cases, Donor Recognition should not be promised in perpetuity. Limited-term recognition may be offered. At the expiration of the term, the Donor may be given the first opportunity to extend the named recognition upon the terms and conditions agreed to amongst the Donor, relevant Partner(s), and the FCO.
9. Lead Agencies may choose to partner with Agency Fundraising Organizations (AFO) to raise funds for their Foundry centre. Such partnerships are valued and reflect the mission of Foundry. In such cases, the leadership role of Foundry Lead Agencies must be included in any publicly-facing communications from the Lead Agency, AFO or otherwise.
10. These Practice Guidelines may change from time to time.

VI. JURISDICTION:

These Practice Guidelines apply to all organizations fundraising on behalf of Foundry and/or its centres and/or Foundry's online resources, for gifts designated to Foundry and/or its centres and/or Foundry's online resources. It applies to gifts of cash or securities. Partners may elect to apply these practice

guidelines to other types of gifts in-kind that are eligible for charitable tax receipting, such as goods or artwork, should the market value of such gifts fall within applicable Donor Recognition thresholds.

These Practice Guidelines do not apply to recognition honouring other types of contributions that are not eligible for charitable tax receipting, such as time, expertise, or leadership.

VII. ROLES AND RESPONSIBILITIES:

Generally, recognition and stewardship of Donors will be the responsibility of the Partner soliciting and receiving the Donation, with support and coordination provided by the FCO.

Naming Recognition must be documented in writing between the Donor and relevant Partner(s), and between the Partner(s) and the FCO. Such documentation will be the responsibility of the Partner soliciting and receiving the Donation.

VIII. RECOGNITION TYPES AND OPPORTUNITIES:

1. Naming Recognition

Naming Recognition generally falls into three categories: 1) Facilities (inside or outside), including rooms, lounges, or gardens, 2) Programs, such vocational training, peer support or life skills, and 3) Online resources, such as e-health websites or tools. In some cases, naming of positions, such as fellowships, may also be a possibility.

2. Signage Recognition

Signage Recognition may include, for example, inclusion on a plaque or Donor wall; placement of a tribute marker, such as on a bench; or listing on a website.

3. Communications

Communications activities may include news releases, social media, other online recognition, listing on a website, or newsletters.

4. Events

Events may be held to celebrate and announce significant Donations to Foundry or its local centres.

5. Stewardship Reports

Stewardship reports include updates to Donors on the outcomes of their Donations. The FCO will provide regular progress updates; which Partners may use for this purpose.

6. Thank-You Procedures

This may include an organization's standard procedures for thanking donors, such as meetings, tours, phone calls, emails, letters, etc.

IX. PROCEDURES:

1. Establishing Giving Levels and Recognition Eligibility:

The FCO will develop recommended giving levels and recognition eligibility in collaboration with its Partners. Such levels and eligibility may change from time to time. (A current schedule is attached as Appendix 1.)

2. Approval of Naming Recognition:

Any Naming or Signage Recognition at Foundry local centres must be approved by the Lead Agency of that centre before a commitment is made to a Donor (i.e., if the Donor Recognition will be for any part of Foundry outside of the Partner's scope or authority).

Any Naming Recognition affiliated with the FCO or provincial initiatives such as Foundry's online resources must be approved by the Executive Director of the FCO. The Executive Director may elect to seek approval from the Foundry Governing Council.

In certain cases, naming may be subject to the Province of BC or other governing bodies. Responsibility for securing this approval, as applicable, will fall to the Partner soliciting and receiving the Donation(s). Assistance may be requested from the FCO.

3. Branding:

All Donor Recognition affiliated with a Foundry centre or online space will be aligned with its common brand. Branding guidelines and their application to Donor Recognition (e.g. plaques) will be available from the FCO. Templates for Donor Recognition walls, signage and plaques will be made available by the FCO.

4. Budget:

The FCO will cover costs associated with 1) the design of template Donor Recognition walls and signage, as part of its overall branding package, and 2) the production of at least one initial Donor Recognition wall in each centre. Any additional costs related to Donor Recognition, such as production of plaques or execution of events, will be the responsibility of the Partner securing the Donation(s).

5. Maintenance:

Maintenance of any Donor Recognition (e.g. updating plaques or donor walls) will be the responsibility of the Partner securing the Donation(s).

6. Documentation and Implementation:

Partners will confirm details of Donor Recognition, including specifics of any commitments the FCO must implement (for example, updates to its website), exact wording and a photo where applicable, with Foundry in writing. This information will be catalogued by the organization receiving the Donation, and by the FCO.

X. CONTACT:

Questions and feedback are welcomed. Please direct to:

Principal, Fund Development
Foundry Central Office