

<b>Policy Title: Donor Recognition</b>	<b>Category:</b> FR-5 (Page 1 of 5)
<b>Policy Type:</b> Fundraising	<b>Approved:</b> Sept. 28, 2001 <b>Revised:</b> March 7, 2019
<b>Review Frequency:</b> Annually	<b>When:</b> December

## **INTENT**

A donor's gift is philanthropic. Donor recognition is both an obligation and an opportunity. It is an obligation to acknowledge and thank our donors and an opportunity to secure, strengthen and perpetuate the relationship with our donors.

The WDM adheres to the Association of Fundraising Professionals - Donor Bill of Rights.<sup>1</sup>

In keeping with the Donor Bill of Rights and the WDM's paradigm of honouring the donor, not the donation, the Donor Recognition Policy defines the standards by which we will thank and recognize donors for their gifts to the WDM.

The types of gifts acceptable to the WDM are outlined in the **Gift Acceptance Policy**. Sponsorship is dealt with in the **Sponsorship Policy**.

## **GOAL**

An effective recognition and stewardship program will ensure that:

- a) Donors are thanked and recognized in a timely, appropriate manner and that stewardship is provided on an ongoing basis.
- b) Positive relationships are created and nurtured with donors.
- c) Donors feel connected to the WDM and are motivated to be involved with the Museum.
- d) Relationships with donors are created that lead to future gifts.
- e) Others are inspired to give to the WDM.
- f) Donor recognition benefits are administered consistently, and
- g) Accurate recognition system for all levels of giving is develop and maintained.

All gifts are considered important and the WDM is responsible for nurturing each donor individually.

## **CONFIDENTIALITY**

The WDM will respect and observe any donor's wish for anonymity and will seek to receive specific instructions from each donor prior to any act of public recognition. Donor's names will not be publicly recognized in any form without written permission from the donor.

Unless otherwise directed by the donor, the specific amount of the donation(s) and terms of payment will remain confidential. Donation amounts will not be listed in Minutes or Reports.

Access to donor information will in keeping with the WDM's Privacy Policy and the restrictions therein.

---

<sup>1</sup> <https://afpglobal.org/donor-bill-rights>

## REGULATIONS

1. Donor recognition will be based on cumulative donations to the WDM including annual appeals, gifts in-kind, endowments, planned giving and unsolicited gifts.
2. Membership fees, admission fees and revenue for which there was a benefit will not be included in the cumulative total for donor recognition.
3. Donors will receive a charitable tax receipt as per the WDM **Receiving Policy**. The WDM will adhere to the Canada Income Tax Act and regulations when issuing charitable tax receipts for all donations.
4. Donor recognition will be cognizant of, and accommodating of museum responsibilities including adherence to mandate, sensitivities of aesthetics and exhibit integrity.
5. Donor recognition may not unduly impinge upon exhibit development and design.
6. Cumulative annual cost of the donor recognition expense **may not exceed 10% of the gift amount, or \$75.00, whichever is less.**
7. The WDM reserves the right to withdraw recognition and naming agreements should such withdrawal be deemed in the best interest of the Museum. Withdrawal may be considered in light of any actions that the Board deems detrimental to the image of the WDM in being associated with that individual such as criminal offence or actions not in alignment with the Museum's values.

## RESPONSIBILITIES

The Manager of Philanthropy is responsible for:

- a) Communicating the standardized donor recognition benefits to potential museum donors;
- b) Negotiating major and planned gifts with donors;
- c) Obtaining the donor's permission to recognize their gift to the WDM and
- d) Ensuring that donor recognition benefits are completed in a timely manner.

The Museum Managers and the Exhibits Department are responsible for liaising with the Development office to ensure that donor recognition which potentially impinges upon exhibit development and design is acceptable within museum parameters.

Marketing strategies for donor recognition will be the combined responsibility of the Director of Marketing and the Manager of Philanthropy.

## **WDM DONOR RECOGNITION BENEFITS**

### **Annual Gifts \$20 - \$99**

- Will receive a charitable tax receipt
- Will receive a pre-printed thank you inserted with the charitable tax receipt

### **Annual gifts \$100-\$999**

- Will receive a charitable tax receipt
- Will receive a thank-you letter from the CEO
- Will receive mailed copies of *Sparks* newsletter for the rest of the gift year
- Will be listed on the WDM website only in the year the gift is received
- Will receive invitations to general functions hosted by WDM from the geographical museum location deemed most appropriate

### **Annual gifts \$1000-\$4999**

- Will receive a charitable tax receipt
- Will receive a jointly signed thank-you letter from the CEO and the Board Chair
- Will receive mailed copies of *Sparks* newsletter for the rest of the gift year, and for the year following the donation
- Will be listed in the Annual Report only in the year the gift is received
- Will receive a mailed copy of the Annual Report that they are listed in
- Will be listed on the WDM website only in the year the gift is received
- Will receive invitations to general functions hosted by WDM from the geographical museum location deemed most appropriate
- Name on donor walls at all four Museum locations

### **Annual gifts \$5000 - \$9999**

- Will be given the option to specify the purpose of their gift in a Donor Agreement.
- Will receive a charitable tax receipt
- Will receive a jointly signed thank-you letter from the CEO and the Board Chair
- Will receive mailed copies of *Sparks* newsletter for the rest of the gift year, and for one year following the donation
- Will be listed in the Annual Report only in the year the gift is received
- Will receive a mailed copy of the Annual Report that they are listed in
- Will be listed on the WDM website only in the year the gift is received
- Will receive invitations to general functions hosted by WDM from all locations
- Name on donor walls at all four Museum locations

### **Annual and cumulative gifts \$10000+**

- Will be given the option to specify the purpose of their gift in a Donor Agreement.
- Will receive a charitable tax receipt
- Will receive a jointly signed thank-you letter from the CEO and the Board Chair
- Will receive mailed copies of *Sparks* newsletter for the rest of the gift year, and for two years following the donation

- Will be listed in the Annual Report only in the year the gift is received
- Will receive a mailed copy of the Annual Report that they are listed in
- Will be listed on the WDM website only in the year the gift is received
- Will receive invitations to general functions hosted by WDM from all locations
- Name on donor walls at all four Museum locations

**Annual and cumulative gifts \$25000+**

- Will be given the option to specify the purpose of their gift in a Donor Agreement.
- Will receive a charitable tax receipt
- Will receive a jointly signed thank-you letter from the CEO and the Board Chair
- Will receive mailed copies of *Sparks* newsletter for the rest of the gift year, and for two years following the donation
- Will be listed in the Annual Report only in the year the gift is received
- Will receive a mailed copy of the Annual Report that they are listed in
- Will be listed on the WDM website only in the year the gift is received
- Will receive invitations to general functions hosted by WDM from all locations
- Name on donor walls at all four Museum locations
- Will receive a Complimentary Family Museum Membership for one year
- Will receive a private museum tour for the donor and guests

**Annual and cumulative gifts \$50000+**

- Will be given the option to specify the purpose of their gift in a Donor Agreement.
- Will receive a charitable tax receipt
- Will receive a thank you telephone call from the CEO or the Board Chair within 48 hours of the gift being received
- Will receive a jointly signed thank-you letter from the CEO and the Board Chair
- Will be profiled in the *Sparks* newsletter
- Will receive mailed copies of *Sparks* newsletter for the rest of the gift year, and for two years following the donation
- Will be profiled in the Annual Report only in the year the gift is received
- Will receive a mailed copy of the Annual Report that they are profiled in
- Will be profiled on WDM website only in the year the gift is received
- Will receive invitations to general functions hosted by WDM from all locations
- Name on donor walls at all four Museum locations
- Will receive a private museum tour for the donor and guests
- Will receive a private corporate office tour for the donor and guests
- Will receive a commemorative memento acknowledging the gift
- Will receive a Complimentary Museum Family Membership for one year

### **Annual and cumulative gifts \$100000+**

- Will be given the option to specify the purpose of their gift in a Donor Agreement.
- Will receive a charitable tax receipt
- Will receive a thank you telephone call from the CEO or the Board Chair within 48 hours of the gift being received
- Will receive a jointly signed thank-you letter from the CEO and the Board Chair
- Will be profiled in the *Sparks* newsletter
- Will receive mailed copies of *Sparks* newsletter for the rest of the gift year, and for two years following the donation
- Will be profiled in the Annual Report in the year the gift is received
- Will receive a mailed copy of the Annual Report that they are profiled in
- Will be listed on the WDM website only in the year the gift is received
- Will receive invitations to general functions hosted by WDM from all locations
- Name on donor walls at all four Museum locations
- Will receive a private museum tour for the donor and guests
- Will receive a private corporate office tour for the donor and guests
- Will receive a VIP reception/hayride/sleigh ride, arranged at the appropriate Museum location
- Will receive a commemorative memento acknowledging the gift.
- Will receive a Complimentary Museum Family Membership for one year, which may be renewed, at the discretion of the Manager of Philanthropy
- Will be nominated by the WDM as a Valued Supporter for National Philanthropy Day, in Saskatoon
- Will receive the option of a one-time acknowledgement in the newspaper of the donor's choice.

### **PROCEDURES**

As the WDM is in the business of preserving history, all current donors listed on the pre-existing WDM donor walls shall be "grandfathered"/included on the new donor walls. Once included, WDM donors shall not be removed from our donor walls.

Donor lists shall be consistent at all four Museum locations.

Commemorative gifts shall be created yearly and will be unique to the WDM. Example: An item created by a WDM blacksmith.