



**EFFECTIVE: DECEMBER 2022**

# **Donor Recognition and Stewardship Policy**

**POLICY 2.1**

**APPROVED BY THE BOARD OF DIRECTORS, NOVEMBER 24, 2022**



**THE COMMUNITY  
FOUNDATION**  
building a greater saint john

<b>POLICY CATEGORY:</b> Donor	<b>NUMBER:</b> 2.1	<b>PAGE:</b> 1 of 3
<b>SUBJECT:</b> Donor Recognition and Stewardship Policy		
<b>EFFECTIVE DATE/APPROVED:</b> September 2016	<b>REVISED/REAFFIRMED:</b> Revised December 2022	<b>SUBJECT FOR REVIEW:</b> As Required

**Policy Statement:**

The Greater Saint John Community Foundation (the Foundation) believes that Donor recognition is both an obligation and an opportunity: an obligation to acknowledge and thank our donors and an opportunity to secure, strengthen and perpetuate – to steward – the relationship with our donor.

The Foundation practices an approach to acknowledgement and recognition that is donor-centered. This means that the fundamental interests and sensitivity of donors are paramount in the design and delivery of all communications, whether written or in-person.

An effective recognition and stewardship program strives to achieve the following:

- To say thank you to our donors, to show appreciation and to recognize their gift
- To be able to thank our donors during their lifetime, thereby strengthening the relationship
- To secure gifts, in particular bequests
- To educate donors to understand donations as irrevocable gifts
- To create a relationship with our donors that could possibly lead to further gifts
- To motivate involvement of our donors with the Foundation
- To encourage testimonials
- To inspire others to give – peer recommendation of the Foundation
- To understand, document and respect the level to which a donor wished to be publicly recognized, if at all

<b>POLICY CATEGORY:</b> Donor	<b>NUMBER:</b> 2.1	<b>PAGE:</b> 2 of 3
<b>SUBJECT:</b> Donor Recognition and Stewardship Policy		

**Procedures:**

1. Each donor is issued a charitable tax receipt, regardless of gift amount, as per the Receiving Gifts and Receipting Policy #2.3. In addition to the receipt, donors will receive a thank you note and/or phone call, depending on the level of giving.
 

Gifts less than \$100	Generic thank you card and/or short note on receipt.
Gifts of \$100+	Handwritten thank you card included with receipt. Phone call from Program Manager, Fund Development, when possible.
Gifts of \$1,000+	Phone call from Program Manager, Fund Development or a Board Member
Gifts of \$5,000+	Phone call from the President and CEO or a Board Member, when possible.

Online donations made through Canada Helps are automatically receipted. The donations will be acknowledged as above with gifts less than \$1,000 receiving a personal thank you note through email and a phone call, when possible.
2. Each donor or donor designate associated with a restricted endowed fund receives a detailed fund statement following the Annual General Meeting and the approval of audited financial statements. Donors are contacted by the President and CEO or the Manager of Fund Development to arrange a time to review the fund statement either via telephone or in person.
3. Selected donors receive a printed copy of our Annual Report following its publication. A copy is available to all via the Foundation's website.
4. The Foundation may acknowledge donors' generosity from time to time through personal calls and visits from Foundation representatives.
5. Donors shall be invited, through the most appropriate means of communication, to attend annual special events hosted by the Foundation.
6. All information, philanthropic intent and content of fund agreements will be held in strict confidence, subject to legally authorized and enforceable requests for information. All other requests for information regarding a donor will only be provided if prior written consent from the donor or their legal representative, trustee or attorney by way of a Power of Attorney has been received.

<b>POLICY CATEGORY:</b> Donor	<b>NUMBER:</b> 2.1	<b>PAGE:</b> 3 of 3
<b>SUBJECT:</b> Donor Recognition and Stewardship Policy		

7. Any public recognition, whether it be the gift itself, the amount, the name of the donor or any combination thereof, can only occur with the donor's consent.
8. With consent, the Foundation shall design and execute donor public recognition strategies and/or events that showcase donors' gifts at work. These activities or events shall incur modest expenditures in order to avoid real or perceived criticisms about cost, and shall, in tone and delivery, acknowledge the collective generosity and importance of all of our donors.
9. The Foundation shall refrain from categorizing donor recognition based on the value of the gift in the belief that any gift is of benefit to our community.
10. When appropriate, fund holders will be advised how their grants are distributed each year. This will ensure an understanding of the impact of their fund in the community.

**References:**

Receiving Gifts and Receipting Policy #2.3