



POLICY: Donor Recognition

POLICY NUMBER: 3.04
ISSUING AUTHORITY: Community CFPD of Portage and District Inc.

APPROVED: October 20, 2020
LAST REVIEWED: November 2023
NEXT REVIEW: November 2026

Purpose:

The purpose of this policy is to provide guidelines on donor recognition, which is an obligation and an opportunity: an obligation to acknowledge and thank our donors and an opportunity to secure, strengthen, engage and perpetuate the relationship with our donor. Developing a long-term lasting relationship with the donor where they feel they are valued, is a primary focus of CFPD. The CFPD will use all opportunities to recognize the collective generosity and importance of all donors.

Policy Statement:

CFPD will publicly acknowledge all donations unless the donor wishes to remain anonymous. All donors will be listed in the annual report; however the actual amount of donation will not be published.

The privacy of donors will be respected. Donor records maintained by CFPD will be kept confidential to the extent possible. Donors or their legally authorized representative(s) have the right to see their donor record, and to challenge its accuracy. The physical record remains with CFPD and will be stored and maintained in perpetuity. CFPD will not share its donor list with other organizations.

At a minimum, donor recognition is to be as follows:

Donations in General

Standard electronic letter with receipt All Donations
(To be signed by the ED plus either the Chair or Vice-Chair)

Personal handwritten note Donations \$100+ cumulative yearly *
*At the discretion of the Executive Director a note may be sent to donations below \$100

Phone call from Board member Donations over \$1000
*At the discretion of the Executive Director a phone call may be take place for donations below \$1000

CFPD event invitations All donors for the year + past donors over \$1000

Electronic Annual Report* Upon request
* A limited number of printed copies of the Annual report will be made available

Newly created Funds

Standard electronic letter with receipt

Personal handwritten note

Vignette in next annual report

With donor permission

Media release

With donor permission at the discretion of Executive Director

Existing Funds

Annual Fund Statement with Annual Report

All fund holders

Fund Anniversaries will be recognized along with Annual Fund Statement in increments of 5 years

CFPD event invitations

All fund holders

Highlighting on Website and in social media

All fund holders

At a minimum, donor engagement is to be as follows:

Request email address to continue communication with donors past the recognition process.

Request social media engagement on standardized thank you letter with receipt.

Electronic messaging will be used to keep donors engaged and informed about CFPD.

Responsibility: Review and revision of this policy if required, with subsequent recommendation to the Board for approval.