

Donor Appreciation and Recognition Policy

Purpose

- To thank and honour all donors
- To build a positive on-going relationship with donors to stimulate further contribution, increased giving and inspire non-donors to support the organization.
- All donors to Lupus Ontario are appropriately recognized through a uniform recognition structure for their gift.

Policy Objectives

Lupus Ontario will appreciate and recognize all donors according to the following guidelines:

Donor Appreciation

Gift acknowledgement

Lupus Ontario 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.

- Lupus Ontario will follow current CRA gift guidelines when issuing acknowledgement letters/receipts for tax purposes.
- All donors will receive a personal thank you letter/receipt for gifts over \$20.
- Acknowledgement letters/receipts will be mailed within 10 business days of receipt of the contribution.
- Gifts over \$1,000
 - In addition to the recognition included in the previous category donors will be featured in annual report.

Accountability of the use of gifts

- All donors with their permission will receive the e-newsletter Lupus Link, or a mailed copy of the Lupus Link. The newsletter features updates and informs donors of the accomplishments their donations have made possible.
- Donors of endowed funds shall receive an annual stewardship report on the value and uses of the fund.
- The reporting requirements of all grant makers will be fulfilled in a timely and accurate manner.

- Monthly donors will receive a yearly report/letter on the use of their funds.
- Once the gift is utilized, the families of planned gift donors will be provided a report/letter on the use of the funds, if appropriate.
- Lupus Ontario will seek approval from third party organizers before sending thank you letters to donors of their campaigns.

Expressions of Appreciation for Gifts

- All donors will be thanked according to the provision of the acknowledgement section (point 1) of this policy. Donations made online will receive email acknowledgement.
- In addition, all general donors of \$100 - 499 will be thanked by the Fundraising & Marketing Manager, via phone call or email.
- All donors of \$500 - \$999 will be thanked by the Fundraising & Marketing Manager, via telephone or handwritten note, whichever is more appropriate.
- All donors of over \$1,000 will be thanked by the President of Lupus Ontario, via telephone or handwritten note, whichever is more appropriate.
- For corporate donors and sponsors, a plaque will be given for cumulative gifts over \$10,000. The donor / sponsor will be consulted before printing the plaque.

Donor Recognition

- Permission

To the best of its ability, Lupus Ontario will try to consult the donor and obtain permission before any public listing. Any desire for anonymity will be respected.

- Accuracy

All donors who qualify for permanent recognition will be consulted to determine the accuracy of spelling and preference for listing before recognition occurs.

- Pledges

Donors who make pledges will qualify for recognition and publicity based on the total pledge amount, in the year the pledge is received.

- In-kind contributions

In-kind contributions of products, services, equipment, furnishings etc. shall receive recognition based on the fair market value of the gift and shall be recognized according to the same guidelines used to recognize cash gifts.

- Timeliness of Recognition

Temporary and/or permanent recognition for gifts will be completed as soon as

is feasibly possible.

- Uniqueness

It is understood that there will be unique instances which may necessitate recognition outside of these established criteria. Recognition for gifts in this category will be on an individual basis as determined by the Lupus Ontario Board of Directors.

- Budget

Adequate budget will be made available to conduct the donor recognition program.

Authority for Administration of Donor Recognition Policies

- The final authority for resolution of issues relative to these donor recognition policies rests with the Lupus Ontario Board of Directors after consultation with the Lupus Ontario Fund Development Committee and the Fundraising & Marketing Manager.
- The Fundraising & Marketing Manager will administer these policies.
- The Lupus Ontario Board of Directors may amend or modify these policies as appropriate.