



<b>SUBJECT:</b>  Donor Recognition	<b>CATEGORY:</b>  Operations & Administrative Services – Donor and Alumni Relations	<b>NO.</b>  O-4.1
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**PREAMBLE**

SIAS recognizes and appreciates the generosity of individuals, businesses and organizations that invest in our students, programs and services. Recognizing the financial investment made by our private supporters demonstrates the importance of these partners in the fulfillment of our mission and the advancement of SIAS.

In keeping with SIAS's values and goals, in accordance with the Canada Revenue Agency (CRA) policy related to charitable giving, and to help SIAS achieve its stewardship and long-term development objectives, this policy will:

- provide appropriate, timely and donor-centred recognition of all gifts;
- elevate donors' sights and serve as a cultivation tool for larger donations;
- guide the public recognition and acknowledgement of major donors;
- provide public evidence of philanthropic activity that reflects internal and external support for SIAS; and
- encourage others to invest in SIAS.

This policy applies to all fundraising activities of SIAS including: annual giving, planned gifts, special fundraising initiatives, campaigns and any arms-length bodies conducting fundraising on behalf of SIAS.

**POLICY**

SIAS will recognize all donations and/or documented pledges from individuals, corporations, foundations, associations and organizations at the appropriate level.

Appropriate recognition based on the annual and cumulative level of giving by donors will ensure parity of recognition among donors.

The Donor and Alumni Relations office is responsible for ensuring all donors are appropriately recognized in a timely manner and to the extent the donor is willing to be recognized. It will also work with other SIAS departments and units in the administration and implementation of the policy and guidelines.

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## **PROCEDURES**

Recognition programs are most effective when they are simple, flexible, attractive and multi-tiered. Recognition levels and related benefits must have sufficient diversity to ensure such levels promote peer recognition of substantial donations. Benefits related to the level of the gift reflect the impact of the donation on SIAST and the importance of the donation to the vision, mission and goals of the institution.

1. All donations and/or documented pledges from individuals, corporations, foundations, associations and organizations will be recognized at the appropriate level.
2. Donor recognition shall be subject to donor wishes as to confidentiality. Donors requesting anonymity shall be omitted from all public displays and publications.
3. The donor recognition guidelines chart (Appendix A) is to be used as the official guideline for determining benefits at each donation level.
4. All donations will receive recognition. For donations of \$100,000 or more, the Donor and Alumni Relations office, in conjunction with the donor, will design a customized recognition and stewardship plan.
5. Plans may be developed for donations below \$100,000 on a case-by-case basis. This flexibility will allow current and lapsed donors (e.g. donors who provided support to SIAST prior to the implementation of this policy and these guidelines), to be transitioned to this policy and the guidelines.
6. In the case of approved campaigns, donors will be listed for the full amount of their pledge in the campaign's final report and other places and publications as appropriate.
7. Gift-in-kind donors will be listed in the appropriate category based on the fair market value of their gift.
8. In the case of realized bequests, donors will be listed as "The Estate of ..." The level of recognition and final value of the gift to be counted will be determined in accordance with the donor recognition guidelines.
9. Campaign financial policies should guide the assessment and recognition of all campaign donations.
10. The Naming policy #G-2.3 will determine the appropriate donation level required to secure a naming opportunity.
11. Special events, campaigns and other initiatives will have separate donor recognition programs that reflect the donor recognition guidelines as well as the specific nature of the event, campaign and/or initiative.

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On a case-by-case basis - naming of physical, academic and operational entities						✓	✓	✓	✓	✓	✓	✓
<b>Publications</b>												
Donor and alumni report - listing	✓	✓	✓	✓	✓							
Donor and alumni report - logo						✓	✓	✓	✓	✓	✓	✓
<i>Partners</i> feature - when available									✓	✓	✓	✓
<b>Media</b>												
Media release					✓	✓	✓	✓	✓	✓		
Media invited to presentation event or announcement event					On a case-by-case basis	On a case-by-case basis	✓	✓	✓	✓	✓	✓
<b>Presentations - if Desired by Donor</b>												
With program staff				✓	✓	✓	✓	✓	✓	✓	✓	✓
With program staff and senior management staff							✓	✓	✓	✓	✓	✓
<b>Special Events</b>												
Complimentary tickets to special events - for the term of the gift agreement or five years, whichever is less	---	---	---	---	---	2	2	4	4	8	8	8
Sponsors listed in printed program for the event	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<b>Donor Recognition Events</b>												
Annual	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
On a case-by-case basis - breakfast, lunch or dinner with president and/or board and/or senior management staff					✓	✓	✓	✓	✓	✓	✓	✓
* <i>In some instances CRA regulations may prohibit the issuing of a charitable receipt</i>												
<b>Note: Shaded items are existing activities. Un-shaded items are activities under development.</b>												