



TITLE: Donor Recognition Policy	SPONSOR: Director, Stewardship
Distribution:	Issuing Authority: President & CEO

PREAMBLE/BACKGROUND

This Donor Recognition Policy (Policy) is designed to ensure those who support the QEII Health Sciences Centre (QEII), through charitable giving to the Queen Elizabeth II Health Sciences Centre Foundation (QEII Foundation), receive recognition that is appropriate, equitable, timely and consistent. This Policy is based on the view that all gifts are important, that donor recognition and stewardship are essential, and that the donor will be treated with the utmost respect. The Policy aims to provide realistic yet flexible guidance in order to effectively address unique and complex situations.

GUIDING PRINCIPLES AND VALUES

- Every donor is thanked promptly;
- Donors are treated equitably with a policy of recognition that is easily understood and applied in a manner consistent with the donor’s intentions;
- Meaningful and continued relationships between the Foundation, our donors and the hospital programs they support are to be fostered;
- Cultivation of additional future gifts from existing donors or the potential to attract new ones;

DEFINITIONS

1. **Endowment** - A permanently invested fund where only the annual income may be spent.
2. **Naming Opportunities** - Refer to official changes in name for particular facilities/spaces in return for significant donations, usually designated in support of those facilities/spaces.
3. **Dedication** - Typically a plaque with short printed text associating the area where it is installed with the generosity of the donor. This does not impact the naming of an area

4. **Stewardship** - Stewardship is the process by which a charitable institution acknowledges gifts, recognizes donor intent, and invests and uses gifts prudently.
5. **Charitable Gift** - The Canada Revenue Agency defines a charitable gift as “a voluntary transfer of property without valuable consideration.” Gifts may be given as referenced in the Gift Acceptance Policy

POLICY & PROCEDURES

Recognition for Gifts

The Foundation’s recognition program considers the size, and designation or stated purpose of the gift. As well the individual situation, personality of the donor, previous giving history and relationships will be taken into account. Recognition will incorporate the following elements:

- Thank you letter
- Information on how the gift has helped the QEII Health Sciences Centre
- Inclusion on a Wall of Honour
- Recommended actions as outlined in the Donor Recognition Guidelines table (see Appendix A)

More specifically:

(a) \$50 - \$249

- Personal thank you letter, with receipt
- Placed on *for Health* distribution list.

(b) \$250-\$9,999 (see donor recognition table for gifts \$9,999+)

- Personal thank you letter, with receipt.
- Placed on *For Health* distribution list.
- Listed in *Annual Report*.
- Placed on *Annual Report* distribution list.
- Appropriate Members’ Circle benefits.

Wall of Honour

The Wall of Honour is an essential means of honouring our donors. Donors’ accumulated totals, including pledged commitments and planned or deferred gifts, are recorded on an annual basis. Names of individuals who have had gifts (\$10,000 or more) made in their memory or tribute are captured on the wall. This practice is subject to revision from time to time at the discretion of the QEII Foundation, although recognition previously received and awarded will be provided. Panels also exist to provide recognition to our annual *Members’ Circle* Donors. The QEII Foundation may also establish Walls of Honour for specific purposes like campaigns or particular disciplines.

QEII Foundation - Wall of Honour Giving Categories

Category	Amount
Associate	\$10,000 - \$24,999
Partner	\$25,000 - \$99,999
Leader	\$100,000 - \$249,999
Patron	\$250,000 - \$499,999
Benefactor	\$500,000 - \$999,999
Humanitarian	\$1,000,000 - \$4,999,999
Visionary	\$5,000,000 - \$9,999,999
Guardian	\$10,000,000 and over

Plaques

With the approval of the QEII Foundation, in conjunction with the QEII, plaques may be placed as requested for donations of specified amounts (generally in excess of \$25,000) throughout the QEII. All plaques shall be given appropriate reference and may be placed throughout the facility on equipment, patient rooms, family rooms, or other spaces in a standardized manner.

Plaques will remain on the site/equipment for the duration of the site/equipment's lifetime. In the event of construction and/or renovations, plaques designated for a specific area may be relocated to the new development area or permanently removed. Plaques that are removed will be returned to the QEII Foundation for archiving or distribution at the donor or designate's request.

Naming Opportunities

A uniform, visible naming procedure is an essential donor recognition instrument. Naming Opportunities are available for donations of specified amounts. Strong emphasis will be placed on ensuring the interests of the QEII are fully served in negotiations with prospective benefactors regarding any new Naming Opportunities. All Naming Opportunities must be approved by the QEII Foundation Board of Trustees, in conjunction with Capital Health on an individual basis.

Endowments (for a minimum contribution of \$100,000) that adhere to the Statement of Investment Management – Endowment Management Policy can also be named. Where an Endowment has been named, the recognition will be maintained in perpetuity.

Anonymity

The Foundation will respect and observe any donor's wish for anonymity and all campaigns, programs, and appeals will provide an opportunity for them to indicate this preference.

Public Announcement

When appropriate, special recognition may be given in Capital Health and QEII Foundation publications or external media. Such recognition is assessed on an individual basis and is at the discretion of the QEII Foundation, with the approval of the donor.

Corporate Recognition

Because corporate philanthropy is closely linked to shareholder and employee relationships, wherever possible and appropriate, the QEII Foundation will seek to meet the specific requirements of the corporate donor with respect to tours, publicity, and strategic partnerships. However, ethical considerations and consultation with Capital Health will be part of the balancing as well. When the nature of the recognition or relationship being sought is unconventional it is recommended that the Board of Trustees approve this arrangement. Naming opportunities for corporations shall be in the form of text only.

Donor Appreciation Event

Donor appreciation events may be held to thank donors who gave cumulative gifts over a specified amount of time. These events will be opportunities for the QEII Foundation to highlight for our donors the innovative research and care being performed and treatment being delivered at the QEII.

Deferred Gifts

Donors who have given (written) confirmation that the QEII is included in their estate or financial plan are provided an opportunity to have their intentions recognized on a special panel of the Wall of Honour. As with all recognition, once the gift is realized, additional recognition is at the discretion of the QEII Foundation.

Withdrawal of Recognition

The Board of Trustees reserves the right to withdraw recognition and naming agreements should such withdrawal be deemed in the best interest of the QEII. Pledges deemed to be delinquent, and requiring write-off, will result in benefits of recognition being revoked.

Cost of Recognition

Recognition will be cost-effective and should not exceed 3% of gift value. The cost to display all forms of recognition will be determined by the QEII Foundation. The Foundation and the QEII shall determine costs relating to exterior building signage jointly.

Sponsorship

Sponsorship is a contract, usually of limited duration. The sponsorship usually involves a transfer of cash, services or assets of value to the Foundation. These terms usually include recognition that is a direct benefit to the sponsor i.e. specific recognition at an event, listing in publications, etc. No official tax receipt can be issued since there is a direct benefit received by the sponsor.

Gift Acceptance

The QEII Foundation accepts gifts to further its mission and those that do not compromise the values of the QEII Foundation or the QEII Health Sciences Centre. The gift should not have any restrictions for use placed on it by the donor that are incompatible with the QEII's mission nor will it knowingly be accepted from any individual or entity involved in illegal or unethical activity.

Gifts will be accepted that are compatible with the Foundation's Investment Policy and only when there are no unacceptable financial risks or burdens. ie.: gifts that are unmarketable, impractical or inaccessible. In extraordinary circumstances, staff may encourage the donor to discuss the proposed gift with independent legal, financial or tax advisors of the donor's choice to ensure the donor receives a full and accurate explanation of all aspects of the proposed gift.

RELATED FOUNDATION DOCUMENTS

Gift Acceptance Policy
Gift Agreement Guidelines
Donor Recognition Guidelines
Naming Opportunity Policy



DONOR RECOGNITION GUIDELINES

All donors to the QEII Foundation will be promptly acknowledged for their gift that is an investment in the health of our community. The following table will serve as a guideline to ensure those who contribute receive recognition that is appropriate, equitable and meaningful.

TYPE : Acknowledgement, Recognition, Stewardship, Media, Naming Opportunity	\$10,000,000 and up Guardian	\$5,000,000 to \$9,999,999 Visionary	\$1,000,000 to \$4,999,999 Humanitarian	\$500,000 to \$999,999 Benefactor	\$250,000 to \$499,999 Patron	\$100,000 to \$249,999 Leader	
ACKNOWLEDGEMENT							
Tax Receipt	✓	✓	✓	✓	✓	✓	
Thank You Letter Indicate from whom	✓	✓	✓	✓	✓	✓	
Telephone Call Indicate from whom	✓	✓	✓	✓	✓	✓	
Pledge Completion	✓	✓	✓	✓	✓	✓	

Appendix A:

RECOGNITION & STEWARDSHIP							
Web Site – standard listing	✓	✓	✓	✓	✓	✓	
Web Site – feature article	✓	✓	✓	✓	✓		
Private Meeting/Project Update/Tour	✓	✓	✓	✓	✓	✓	
Designated Department	✓	✓	✓	✓	✓	✓	
TYPE : Acknowledgement, Recognition, Stewardship, Media, Naming Opportunity	\$10,000,000 and up Guardian	\$5,000,000 to \$9,999,999 Visionary	\$1,000,000 to \$4,999,999 Humanitarian	\$500,000 to \$999,999 Benefactor	\$250,000 to \$499,999 Patron	\$100,000 to \$249,999 Leader	
Recognition							
Project Updates/Written	✓	✓	✓	✓	✓	✓	
Written Project update including Photos	✓	✓	✓	✓	✓	✓	
Customized Stewardship Report	✓	✓	✓	✓	✓	✓	
Pledge Reminder	✓	✓	✓	✓	✓	✓	
Tailored Special Event Recognition– Cheque Presentation	✓	✓	✓	✓	✓	✓	
President/Trustee Gathering (VIP Reception)	✓	✓	✓	✓	✓		

Appendix A:

Private meeting or call from President/CEO or appropriate VP	✓	✓	✓	✓	✓	✓	
On priority mailing list for QEII Foundation Signature Events	✓	✓	✓	✓	✓	✓	
Invitation to QEII Foundation Special Events	✓	✓	✓	✓	✓	✓	
Invitation to QEII Donor Appreciation Event	✓	✓	✓	✓	✓	✓	
Invitation to participate in special event – ie donor testimony, award presentation	✓	✓	✓	✓	✓	✓	

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Seasonal Greeting Card	✓	✓	✓	✓	✓	✓	
Invitation to awareness events ie. cultivation event, etc.	✓	✓	✓	✓	✓	✓	
Annual Stewardship Meeting	✓	✓	✓	✓	✓	✓	
Appreciation Gift	✓	✓	✓	✓	✓		
Nomination for Community Award	✓	✓	✓	✓	✓		
MEDIA COVERAGE <i>(will provide best effort)</i>							
Coverage in Internal Publications – QEII Times For Health, Annual Report	✓	✓	✓	✓	✓	✓	
Receive QEII Foundation Newsletters, Annual Report	✓	✓	✓	✓	✓	✓	
News Release	✓	✓	✓	✓			
Host Media Event	✓	✓	✓	✓			
Gift Advertisement	✓	✓	✓	✓	✓	✓	

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NAMING RECOGNITION							
Donor Wall	✓	✓	✓	✓	✓	✓	
Plaque (Dedication)	✓	✓	✓	✓	✓	✓	
Endowment Naming	✓	✓	✓	✓	✓	✓	
Equipment Dedication	✓	✓	✓	✓	✓	✓	
Specific Room in Building	✓	✓	✓	✓	✓		
Common areas in Building	✓	✓	✓	✓			
Clusters	✓	✓	✓				
External Naming	✓	✓					
Building Naming	✓						