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Donor Recognition Program Guidelines

Presented to and approved by Council: August 12, 2009

Introduction

To assist the BWG Leisure Centre Vitality Campaign in reaching its objectives, the Campaign Planning Committee will implement a comprehensive Donor Recognition Program to support the Campaign. The Campaign Donor Recognition Program will give guidance and counsel to all parties involved with planning, promotion, solicitation, receipt, acceptance, application, disposition and stewardship of campaign gifts. While these guidelines will be impartially applied to the fullest extent possible, they must be viewed as flexible and realistic in order to effectively address unique and complex situations that may arise throughout the campaign - providing, of course, that such situations and expectations are consistent with the campaign's and the municipalities policies.

The Campaign Donor Recognition Program is designed to encourage and develop closer relationships between the community of Bradford West Gwillimbury and the Town. In celebrating and recognizing donors' efforts and achievements, the Town of Bradford West Gwillimbury provides opportunities, not only to thank donors, but also to develop and enhance ongoing partnerships with donors.

There are a number of important factors to consider when reviewing options for each donor:

- Individual situation and personality of the donor
- Size, designation or stated purpose of the gift
- Previous giving history (if any) and relationships with the Town of Bradford West Gwillimbury

Donor recognition strives to:

- Raise sights of prospective and current donors
- Motivate donors to higher levels of giving
- Respond to donor demand for case specific areas to donate their funds
- Provide publicity and credibility for the Vitality Campaign
- Honour gifts that have a major impact on the success of the Vitality Campaign
- Strengthen the relationship between the donors, and the Town of Bradford West Gwillimbury - resulting in long term support
- Ensure accountability, illustrating to donors how their contributions help achieve our goals
- Provide a centralized approach for donor recognition and stewardship within a coordinated and centralized framework
- Provide recognition for donors under the \$10,000 level (eg. employees, individual community members)
- Ensure one clearly stated policy of recognition is applied at all times
- Publicly recognize a donor (where appropriate);
- To inform a donor's peers.

Occasionally a situation may arise where the gift under consideration will be of a unique or complex nature. A proper decision regarding appropriate recognition in such cases will be made only after careful consideration of all related factors. In such instances, the merits of the particular gift will be reviewed and considered by the Campaign Management Committee and others involved in the solicitation of the gift, along with Senior Management of the municipality, Council and legal counsel, if necessary.

Objectives

It is essential that donors receive appropriate expressions of appreciation for their campaign gifts. The recognition offered will correspond to the level of the gift; every campaign donor will be thanked promptly. The objectives of the Campaign Donor Recognition Program are as follows:

- Develop a program that meets the specific needs of the campaign
- Develop a comprehensive Campaign Donor Recognition Program that will form the basis and supports a long-term Donor Recognition and Stewardship program for the Town of Bradford West Gwillimbury
- Develop a program that provides public evidence of philanthropic support for the campaign throughout the facility
- Create campaign guidelines for acknowledgement, recognition and communications/media relations
- Create a menu of Naming and Dedication Opportunities to recognize significant campaign commitments

All gifts and/or pledges from individuals, corporations, foundations, associations, organizations and municipalities will be recognized through this program as detailed in the BWG Leisure Centre Vitality Campaign Donor Recognition & Stewardship Matrix. Donors will be listed for the full amount of their pledge in the campaign final report and other places and publications as appropriate.

Gifts-in-kind donors will be listed in the appropriate category for the fair market value of their gift.

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 by the Campaign Director and the Campaign Management Team.

Donors requesting anonymity will be omitted from all public displays and publications. The number of anonymous donors will be noted in each recognition level.

Key Components

The recognition program of the campaign consists of five key elements:

- Recognition Levels
- Events
- Special Naming Opportunities
- Permanent Recognition
- Thank You Policy

Recognition Levels

While acknowledgement confirms and expresses “initial” thanks for the financial commitment of the donor, the recognition component focuses on celebrating in a public manner the donor, the gift, and the purpose/benefit of that gift. The appropriate recognition activity is determined by the donor’s wishes, in conjunction with the campaign guidelines that are based on the gift level and type of gift. Through the Campaign Donor Recognition Program, the campaign shall convey its appreciation to its benefactors.

Effective recognition is:

- Consistent throughout constituencies
- Responsive to the donors’ motivations
- Personalized to the extent permitted by the judicious use of the campaign’s resources
- Unique to the BWG Leisure Centre Vitality Campaign, where possible
- Timely

Donor recognition is best served by the careful balance of consistency on the one hand and personalization and uniqueness on the other. Campaign recognition guidelines, based on giving levels and gift type, ensure that appropriate public recognition takes place and that it is consistent. Recognition commences with a major campaign pledge or an outright gift.

Recognition programs are most effective when they are simple, flexible and multi-tiered. Recognition levels must have sufficient diversity to ensure that peer recognition is achieved by these levels.

Gifts of \$10,000 and greater will receive customized recognition and personal attention. This may occur for donors of gifts below this amount on a case-by-case basis. The Campaign Management Team and the Campaign Director, in consultation with counsel, will develop for each donor of \$10,000 or greater, a recognition and stewardship plan.

To complete the recognition opportunities for donors, the following benefits are suggested for donors:

Gift level: Founding Donor - \$2,500,000

- A copy of the Vitality Campaign Commemorative Book**
- A faux cheques picture in the **tbc (The Topic, the Times, SNAP)** acknowledging your generous commitment
- A personal invitation for a 'hard hat' walk through of the facility prior to public opening
- A personal invitation to a special donors dinner for 10 guests prior to public opening
- A personalized glass sculpture (or some other suitable keepsake) of thanks
- A personalized invitation to our ground breaking in Spring 2010 and participation in the ground breaking ceremony
- A personalized invitation to our ribbon-cutting and donor recognition ceremony to be held in Winter 2012
- A photo opportunity with Vitality Campaign Volunteers and/or Mayor
- A special press event acknowledging your generous commitment
- A two-page donor profile article to be placed on our website and in the Vitality Campaign commemorative book
- An individualized donor recognition ad in the **tbc (The Topic, the Times, SNAP)**
- Inclusion on the Donor Wall at the Founding Donor Level
- Naming of the Leisure Centre - to be negotiated
- Prime Logo placement on all press releases related to the Vitality Campaign
- Prime Logo placement on the Vitality Campaign thank you ad in the **tbc (The Topic, the Times, SNAP)**
- Special Recognition at the Vitality Campaign Launch
- Thank you letter from the Mayor
- Thank you letter from Vitality Campaign Co-Chairs

Gift Level: Visionary - \$500,000 +

- A copy of the Vitality Campaign Commemorative Book**
- A donor profile article to be placed on our website and in the Vitality Campaign commemorative book
- A faux cheques picture in the **tbc (The Topic, the Times, SNAP)** acknowledging your generous commitment
- A personal invitation for a 'hard hat' walk through of the facility prior to public opening
- A personal invitation to a special donors dinner for 6 guests prior to public opening
- A personalized glass sculpture (or some other suitable keepsake) of thanks
- A personalized invitation to our ground breaking in Spring 2010
- A personalized invitation to our ribbon-cutting and donor recognition ceremony to be held in Winter 2012
- A photo opportunity with Vitality Campaign Volunteers and/or Mayor
- An individualized donor recognition ad in the **tbc (The Topic, the Times, SNAP)**
- An special press event acknowledging your generous commitment
- Inclusion on the Donor Wall at the Visionary Donor Level
- Naming Opportunity - to be negotiated

- Prominent Logo inclusion on all press releases related to the Vitality Campaign
- Prominent Logo placement on the Vitality Campaign thank you ad in the **tbc (The Topic, the Times, SNAP)**
- Special recognition at the Vitality Campaign Launch
- Thank you letter from the Mayor
- Thank you letter from Vitality Campaign Co-Chairs

Gift Level: Community Builder - \$100,000 - \$499,999

- A copy of the Vitality Campaign Commemorative Book**
- A donor profile article to be placed on our website and in the Vitality Campaign commemorative book
- A faux cheques picture in the **tbc (The Topic, the Times, SNAP)** acknowledging your generous commitment
- A personal invitation for a small group 'hard hat' walk through of the facility prior to public opening
- A personal invitation to a special donors dinner for 4 guests prior to public opening
- A personalized glass sculpture (or some other suitable keepsake) of thanks
- A photo opportunity with Vitality Campaign Volunteers and/or Mayor
- A press release acknowledging your generous commitment
- An invitation to our ground breaking in Spring 2010
- An invitation to our ribbon-cutting and donor recognition ceremony to be held in Winter 2012
- Inclusion in a donor recognition ad in the **tbc (The Topic, the Times, SNAP)**
- Inclusion on the Donor Wall at the Community Builder Donor Level
- Logo inclusion on all press releases related to the Vitality Campaign
- Logo inclusion on the Vitality Campaign thank you ad in the **tbc (The Topic, the Times, SNAP)**
- Naming Opportunity - to be negotiated
- Thank you letter from the Mayor
- Thank you letter from Vitality Campaign Co-Chairs

Gift Level: Patron - \$50,000 - \$99,999

- A copy of the Vitality Campaign Commemorative Book**
- A donor profile article to be placed on our website and in the Vitality Campaign commemorative book
- A personalized framed certificate of recognition
- A photo opportunity with Vitality Campaign Volunteers
- A press release acknowledging your generous commitment
- An invitation to our ground breaking in Spring 2010
- An invitation to our ribbon-cutting and donor recognition ceremony to be held in Winter 2012
- Inclusion in a donor recognition ad in the **tbc (The Topic, the Times, SNAP)**
- Inclusion on the Donor Wall at the Patron Donor Level
- Inclusion on the Vitality Campaign thank you ad in the **tbc (The Topic, the Times, SNAP)**
- Naming Opportunity - to be negotiated

- Thank you letter from the Mayor
- Thank you letter from Vitality Campaign Co-Chairs

Gift Level: Benefactor - \$25,000 - \$49,999

- A copy of the Vitality Campaign Commemorative Book**
- A personalized framed certificate of recognition
- A photo opportunity with Vitality Campaign Volunteers
- An invitation to our ground breaking in Spring 2010
- An invitation to our ribbon-cutting and donor recognition ceremony to be held in Winter 2012
- Inclusion on the Donor Wall at the Benefactor Donor Level
- Inclusion on the Vitality Campaign thank you ad in the **tbc (The Topic, the Times, SNAP)**
- Naming Opportunity - to be negotiated
- Recognition on our website and in the Vitality Campaign commemorative book
- Thank you letter from the Mayor
- Thank you letter from Vitality Campaign Co-Chairs

Gift Level: Supporter - \$10,000 - \$24,999

- A copy of the Vitality Campaign Commemorative Book**
- A personalized certificate of recognition
- A photo opportunity with Vitality Campaign Volunteers
- An invitation to our ground breaking in Spring 2010
- An invitation to our ribbon-cutting and donor recognition ceremony to be held in Winter 2012
- Inclusion on the Donor Wall at the Supporter Donor Level
- Inclusion on the Vitality Campaign thank you ad in the **tbc (The Topic, the Times, SNAP)**
- Recognition on our website and in the Vitality Campaign commemorative book
- Thank you letter from the Mayor
- Thank you letter from Vitality Campaign Co-Chairs

Gift Level: Companion - \$1,000 - \$9,999

- A personalized certificate of recognition
- Acknowledgement in the Vitality Campaign commemorative book
- Acknowledgement on our website
- Inclusion on the Donor Wall at the Companion Donor Level
- Inclusion on the Vitality Campaign thank you ad in the **tbc (The Topic, the Times, SNAP)**
- Thank you letter from Vitality Campaign Co-Chairs

Gift Level: Friend Level - \$1 to \$999

- A personalized certificate of recognition

**** This to be included only if the Vitality Campaign Commemorative Book is created**

BWG Leisure Centre Vitality Campaign Donor Recognition & Stewardship Matrix

	\$1- 999	Companion \$1,000 – 9,999	Supporter \$10,000- 24,999	Benefactor \$25,000- 49,999	Patron \$50,000- 99,999	Community Builder \$100,000- 499,999	Visionary \$500,000- 999,999	Founder \$2,500,000
Special Recognition at the Campaign Launch								
Logo placement on all press releases related to the Campaign							Prominent	Prime
Special press acknowledging your generous commitment					Release	Release	Event	event
A personal invitation to a special donors dinner for x guests prior to public opening						4 ppl.	6 ppl.	10 ppl.
A personal invitation for a 'hard hat' walk through of the facility prior to public opening						Small group	Ind.	Ind.
A personalized glass sculpture (or some other suitable keep sake) of thanks								
Logo inclusion on the campaign thank you ad in the tbc (The Topic, the Times, SNAP)							Prominent	Prime
A donor profile article to be placed on our website and in the Vitality Campaign commemorative book					½ page	1 page	1 page	Multi-page
A photo opportunity with Campaign Volunteers and/or Mayor								
Naming Opportunity - to be negotiated								

	\$100-999	Companion \$1,000 – 9,999	Supporter \$10,000-24,999	Benefactor \$25,000-49,999	Patron \$50,000-99,999	Community Builder \$100,000-499,999	Visionary \$500,000-999,999	Founder \$2,500,000
A personalized invitation to our ribbon-cutting and donor recognition ceremony to be held in Winter 2012								
A faux cheques picture in the tbc (The Topic, the Times, SNAP) acknowledging your generous commitment								
A copy of the Vitality Campaign commemorative book								
Inclusion on the Donor Wall		Companion	Supporter	Benefactor	Patron	Community Builder	Visionary	Founder
A personalized certificate of recognition	Certificate	Certificate	Certificate	Framed	Framed			
An invitation to our ground breaking in Spring 2010								
A photo opportunity with Campaign Volunteers								
Acknowledgement /Recognition on our website and in the Vitality Campaign commemorative book	Acknowledgement	Recognition	Recognition	Recognition	Recognition	Article	Article	Two page Article
Thank you letter from Campaign Co-Chairs								
Thank you letter from the Mayor								

Campaign events are held for three purposes:

- To cultivate and steward donors and prospective donors
- To celebrate gifts to the campaign and thank donors for their generosity
- To create public awareness about the campaign and the campaign milestones

Public gifts announcements for gifts of \$25,000 and more will be co-ordinated with the Campaign Management Team and with input from communications counsel.

Campaign communications/media relations

The Campaign Communications/Media Relations Guidelines will be developed in concert with the Campaign Donor Recognition Program to ensure they are complementary and effective in enhancing Campaign Donor Recognition.

Effective Communication is:

- Distinctive
- Significant
- Accurate
- Timely

Special naming opportunities

From the viewpoint of overall availability, the BWG Leisure Centre's inventory of naming opportunities is a finite resource. It is imperative that strong emphasis is placed on ensuring the interests of both the Town and the BWG Leisure Centre are fully served in negotiations with prospective benefactors regarding any new naming opportunities during this campaign.

The following is a list of naming opportunities for the BWG Leisure Centre Vitality Campaign.

The value assigned to particular recognition opportunities need not reflect the actual cost of the building, property, room or area. Rather, the assigned gift value is set relative to the desirability of the item, its prominence and the giving levels required by the Leisure Centre over time.

Naming opportunities include:

Option A ***

Complex Name*	\$2,000,000	\$2,000,000
Rink A (seating 900)*	\$500,000	\$500,000
Rink B (seating 350)*	\$350,000	\$350,000
Aquatic Centre*	\$300,000	\$300,000
Fitness Centre*	\$100,000	\$100,000
Gymnasium	\$100,000	\$100,000
Child-minding area	\$50,000	\$50,000
Donor recognition wall	\$50,000	\$50,000
Foyer /sitting area	\$50,000	\$50,000
Main level meeting/multi-purpose room	\$50,000	\$50,000
Running/Walking Track	\$50,000	\$50,000
Skate change area	\$50,000	\$50,000
Sunrise meeting square - outside	\$50,000	\$50,000
Multi-purpose Rooms @ \$35K ea.	\$35,000	\$70,000
Commemorative Book**	\$25,000	\$25,000
Dressing Rooms 9 at \$25K ea.	\$25,000	\$225,000
Walkway @ \$25K ea.	\$25,000	\$25,000
TOTAL opportunities		\$4,045,000

Option B ***

Complex Name	\$2,000,000	\$2,000,000
Rink A (seating 900)	\$500,000	\$500,000
Rink B (seating 350) (14@ \$25K)	\$350,000	\$350,000
Aquatic Centre (3 pools @ \$100K)	\$300,000	\$300,000
Fitness Centre	\$100,000	\$100,000
Gymnasium	\$100,000	\$100,000
Child-minding area	\$50,000	\$50,000
Donor recognition wall	\$50,000	\$50,000
Foyer /sitting area	\$50,000	\$50,000
Main level meeting/multi-purpose room	\$50,000	\$50,000
Running/Walking Track	\$50,000	\$50,000
Skate change area	\$50,000	\$50,000
Sunrise meeting square - outside	\$50,000	\$50,000
Multi-purpose Rooms @ \$35K ea.	\$35,000	\$70,000
Commemorative Book**	\$25,000	\$25,000
Dressing rooms 9 at \$25K ea.	\$25,000	\$225,000
Walkway @ \$25K ea.	\$25,000	\$25,000
TOTAL opportunities		\$4,045,000

* These opportunities have two options regarding term of recognition. Please see the Recognition Policies on page 9 for more details.

** Commemorative Book is an optional element used to thank all campaign donors above \$100

*** There are a number of additional naming opportunities that will come into effect with the community campaign

Permanent recognition

The Leisure Centre will have its own donor wall prominently displayed in the entranceway to the building. This donor wall will recognize pledges of \$1,000 or more to the Leisure Centre **Vitality Campaign**. Pledges to the **Vitality Campaign** may be made over a five-year period. The wall will feature the following pledge categories:

Founding Partner
\$2,500,000

Benefactor
\$25,000 - \$49,999

Visionary
\$500,000 +

Supporter
\$10,000 - \$24,999

Community Builder
\$100,000 - \$499,999

Companion
\$1,000 - \$9,999

Patron
\$50,000 - \$99,999

A permanent donor recognition installation for those who contributed \$1,000 and greater to the campaign will be established in a high traffic area within the BWG Leisure Centre. This piece can take the form of a donor board, wall or other format suitable to the site of the installation. Consideration and planning will be taken into consideration as building plans progress. Locations for the donor wall will need to be determined and approved by the BWG Council.

Any member of the BWG Internal Family: Council, Senior Management and Employees of the Town of Bradford West Gwillimbury who donates to the campaign will be named in a special section of the Donor Wall.

The Campaign Director has estimated the budget for the Campaign Donor Wall and signage at a cost of \$25,000.

Thank You Policy

Every gift or pledge to the BWG Leisure Centre Vitality Campaign will be acknowledged by the campaign. Campaign acknowledgment guidelines provide for consistency and are based on the size and designation of the gift or pledge. The finance office will issue an income tax receipt for all campaign gifts

Effective Acknowledgement is:

- Personal
- Timely

A policy supporting the appropriate preparation of thank you letters is an important component of the recognition program. It helps to ensure a consistent, planned and timely approach to donor relations. This policy outlines specific steps that must be taken in every case. In addition to what is outlined by the program, the campaign staff may wish to take the initiative to customized activities as appropriate.

- All donors will receive letter of thanks normally within 3-5 days of written confirmation of their gift/pledge
- All donors of \$100 or more will receive a customized letter signed by the co-chairs of the campaign and mayor
- Donors of \$5,000 or more will receive a thank you phone call from one of the co-chairs and the volunteer who solicited the gift on behalf of Vitality Campaign
- Donors of \$10,000 or more will receive a thank you phone call from both co-chairs, the volunteer solicitor and if deemed appropriate, the Mayor

Campaign Final Report

Most campaigns produce a final report. This document serves as a summary of the Campaign results through engaging graphics, copy and photographs. A Campaign Final Report is traditionally intended to accomplish the following:

- Provide a complete accounting of the funds raised
- Highlight major projects and key Campaign achievements
- Profile a select few major donors
- List all Campaign donors at agreed upon minimum levels

It is proposed that this concept be adopted and expanded as part of the overall Campaign Donor Recognition Program. Format of the Campaign Final Report, which should address the community's vision and response to the Vitality Campaign, can be determined at a later date.

This Final Report would be used as a stewardship tool. A complimentary copy would be distributed to participants invited to attend the Campaign closing event.

Recognition Program Policies

1. Naming opportunities will be determined on a “first come, first served” basis.
2. All donors seeking specific opportunities will have the arrangements formalized in writing, so as to avoid confusion.
3. A record of dedication opportunities (offered and awarded) will be maintained in the Campaign Office, and following the Campaign, with BWG Administration.
4. It will be the responsibility of the BWG Administration to make contact with the donors to finalize dedication opportunities and recognition, before the donor recognition is finalized and installed.
5. The specific opportunities listed below have a specific arrangement allowing naming for either a 25 year period or for life depending on the level of investment the partner chooses to make.

<i>Naming property</i>	<i>Value for 25 years</i>	<i>Value for life (at base +25%)</i>
Complex name	\$2,000,000	\$2,500,000
Rink A (900 seats)	\$500,000	\$625,000
Rink B (350 seats)	\$350,000	\$437,500
Aquatic Centre	\$300,000	\$375,000
Fitness Centre	\$100,000	\$125,000
Gymnasium	\$100,000	\$125,000
TOTAL	\$3,350,000	\$4,187,500

The recognition of donors can be conducted during the campaign, the five-year pledge period, and beyond, in order to recognize gifts, promote the campaign, and build long term relationships. The BWG Council reserves the right to remove a naming or dedication opportunity and will do so by first notifying the donor, prior to removing the signage.

Conclusion

A comprehensive Campaign Donor Recognition Program will serve to ensure consistent, timely and appropriate recognition of Campaign gifts, while setting in place the means by which to continue the major gifts and stewardship efforts of the BWG Leisure Centre as well as any future potential fundraising efforts that the Town of Bradford West Gwillimbury looks to do with the community.