

Policy Title:	Fleming College and Fleming College Foundation (Joint) Donor Recognition Policy
Policy ID:	1-113
Manual Classification:	College Policies
Approved by Foundation Board of Directors: College Board of Governors:	August 13, 2024 March 27, 2024
Effective Date:	April 1, 2024
Next Review Date:	April 2027
Contact for Policy Interpretation:	Associate Vice President, Advancement and Marketing

1.0 – Policy Overview

In grateful appreciation for philanthropic donations, Fleming College and Fleming College Foundation have developed a comprehensive policy to ensure each donor is thanked, celebrated, and recognized for their generosity. All Donor Recognition offered will be in accordance with the missions, vision, and objectives of Fleming College ("the College") and Fleming College Foundation ("the Foundation") and must conform to this Policy.

2.0 – Purpose

This Policy establishes guidelines for the appropriate, equitable, and consistent recognition of philanthropic gifts to Fleming College and Fleming College Foundation, develop a centralized framework for Donor Recognition and stewardship and ensure one clear Policy of recognition is unilaterally applied.

3.0 – Definitions and Acronyms

Donor Recognition: the practice of providing formal, informal, personal, and public expressions of appreciation to donors that make philanthropic contributions to the organization.

FC: Fleming College

FCF: Fleming College Foundation

4.0 – Scope

This Policy applies to all contributions received by the Foundation from individuals, estates, corporations, foundations, service clubs, and other community organizations.

This Policy is approved by the Fleming College Foundation Board of Directors and Fleming College Board of Directors upon the recommendation of the Foundation Chief Fundraising Officer and is administered by the Advancement and External Relations Team,

5.0 – General Principles

Donor Recognition has been established based on giving levels outlined in the Foundation's Donor Recognition framework to support the organization's ongoing stewardship priorities.

- a) The framework outlines recognition, reporting, and engagement opportunities that may be offered to donors based on their giving to the Foundation.
- b) The development and management of the associated recognition opportunities are the responsibility of the Foundation and will be updated as needed to meet the evolving stewardship needs and priorities.

Tax receipts and acknowledgment letters will be issued for all individual donations of \$20 or greater.

The College and the Foundation will respect and observe a donor's wish for anonymity instead of public recognition when requested.

Donors who have remembered Fleming College Foundation in their estate plan will be recognized as members of the Foundation's Legacy Circle.

The Foundation may name an endowment fund in recognition of a donor for endowed gifts of \$25,000 or greater, in accordance with the Foundation's Naming Policy. All other recognition for endowed gifts shall be aligned with the Foundation's Donor Recognition framework.

The Foundation may provide a naming opportunity for a non-endowed expendable donation (minimum of \$5000 payable over five years.) Example: The Smith Family Award, which provides \$1000 a year for a total duration of five years to a deserving student.

5.1 - Physical Recognition

- a) Donors who make a gift or pledge of \$50,000 or above shall qualify for a physical recognition opportunity which may include a dedication plaque installed in/or near the area their donation supports.
- b) A dedication/recognition plaque may be installed near the equipment for donations that support equipment acquisition.
- c) All recognition opportunities and dedication plaques shall be for a maximum of 20 years.
- d) When capital redevelopment of space occurs during the term of an existing recognition opportunity, Fleming College Foundation will work with the donor (their family member or legal representative) to provide appropriate recognition of past philanthropy while providing new opportunities for future gifts integral to the further growth of Fleming College.

- e) In recognition of gifts of \$1,000,000 or greater, the donor shall qualify for a naming opportunity with a designated term according to the Foundation's Naming Policy.
- f) The Foundation may choose to honour long-time loyal donors through physical recognition or naming opportunities to acknowledge their cumulative giving.
- g) In these circumstances, each opportunity will be approved in accordance with the appropriate policy requirements for naming or recognition opportunities.
- h) Physical recognition may begin upon receipt of a minimum of 25 % of the total commitment and a signed gift agreement, with the installation of signage to follow.
- i) Recognition expenses may include events, signage, plaque costs, and other activities associated with recognizing a gift. These costs will be derived from the gift, and the Foundation will ensure expenses are reasonable and aligned with Canada Revenue Agency guidelines for stewardship and recognition costs.
- j) The Foundation may work with the College to pursue cost-sharing arrangements when Donor Recognition needs to be incorporated into a capital development plan.
- k) Recognition expenses for gifts of \$10 million and more will be determined on a case-by-case basis and approved by the Foundation's Senior Leadership Team.
- l) Commercial logos or any wording that may be perceived to have commercial value or advertising intent will not be incorporated into donor wall recognition, dedication plaques, or naming signage.
- m) Except for medical doctors, honourifics and suffixes, e.g., LL.B, will not be incorporated into donor wall recognition, dedication plaques, or naming signage.

5.2 - Physical and Digital Donor Walls

One-time gifts will qualify donors for recognition on the annual donor walls either alphabetically or in giving levels. This is typical for an annual donor wall or included in the Impact Report.

Gifts from different family members may be combined for donor wall recognition.

Donor walls will be updated annually after the close of the fiscal year. A digital donor wall can also be displayed online.

Donor wall recognition celebrates a donor's lifetime giving to the institution, and recognition on the donor wall shall be for the life of the donor walls in its current form.

5.3 - Authority and Approval

The Donor Recognition framework outlines the recognition, engagement, and reporting opportunities at set donation levels that may be offered to a donor. Revisions to the giving levels and associated opportunities are subject to approval by the Foundation's Chief Fundraising Officer.

All proposals for physical recognition opportunities regarding gifts of \$50,000 or more shall be forwarded to the Foundation's Chief Fundraising Officer for approval, who shall determine whether the proposed opportunity conforms to this Policy, is otherwise appropriate, and is of sufficient merit.

All naming opportunities will be offered and conferred following the approval process outlined in the Naming Policy.

Any proposed recognition that falls outside of this Policy will be reviewed on a case-by-case basis by Foundation's executive team that may consist of the Chief Fundraising Officer, Associate Vice President, Marketing and Advancement, Vice-President, Finance & Operations.

5.4 - Gifts Eligible for Recognition

Cash, gifts of stock, securities, ETF, bank to bank transfers, credit card donations, or other cash equivalents made as a one-time gift or as part of a pledge.

- a) Pledges - All contributions, unless otherwise stipulated, are recognized upon receipt of a written pledge form or gift agreement and when accompanied by a minimum of 20% of the pledged amount.
- b) Legacy Gifts:
 - Realized charitable bequests receive the same benefits as cash donations.
 - Donors who have made an irrevocable legacy gift, e.g., a charitable remainder trust, will qualify for recognition at the receipt value. Any physical recognition will be granted following terms outlined in this Policy, the Naming Policy, and the Joint Gift Acceptance Policy.
 - How a legacy gift is recognized is dependent on the type of gift and how it is structured. Each irrevocable legacy gift will be reviewed on a case-by-case basis and discussed with the donor, a family member, or a legal representative.
- c) Memorial Gifts:
 - Memorial gifts will receive the same benefits as a cash donation.
 - The gift will be recognized as a gift to the Foundation in the name of the memorialized person.
- d) Event Sponsorships:
 - Sponsors will receive recognition for sponsorship of the event through the specific sponsorship guidelines established for the event.
 - Sponsorship guidelines for an event may include recognition on the donor walls.
- e) Gift-in-Kind:
 - Recognition benefits for in-kind gifts will equal the liquidated amount but will not be less than 50% of the receipted amount.
- f) Service In-Kind Donations:
 - Service in-kind donations (not converted to cash) are generally not recognized.

- However, in exceptional circumstances, the Foundation's Senior Leadership Team may elect to recognize specific service in-kind donations related to a project, priority, or campaign.

g) Other:

- Gifts that fall outside the mandates of the College and Foundation will be evaluated on a case-by-case basis.

5.5 - Delinquency

Pledge payments in arrears by more than two years, with efforts made by the Foundation to receive payment, may result in the suspension of recognition initiatives until the pledge payments resume.

If the pledge or a partial pledge is written off, recognition will be adjusted to reflect the gifts that have been received.

6.0 – Related Documents

- College Policy 1-114 Fleming College and Fleming College Foundation Joint Gift Acceptance
- College Policy 1-115 Fleming College and Fleming College Foundation Naming Policy
- College Policy 1-111 Access to Information and Protection of Privacy

7.0 – History of Amendments and Reviews

Date Approved	Approved By	List of Approved Amendments/Review
August 13, 2024	Board of Governors	NEW