

Donor Recognition Policy

1 - Purpose

This policy is intended to establish how donors will be recognized by United Way Toronto (UWT).

2 - Scope

This policy applies to public recognition by UWT of donors who donate to the annual campaign, the Tomorrow Fund, or to targeted special projects related to UWT's priority areas.

It does not apply to recognition provided by other organizations to UWT donors who direct their giving to that organization, and over which UWT does not have any control.

3 - Policy

UWT values the generosity of our donors and provides individual thanks and acknowledgement to the degree practical while still maintaining UWT's low operating costs. Acknowledgement and thanks are given to donors by UWT either directly to the donor or collectively through public print or online communication vehicles. Acknowledgement and thanks can also be expressed through volunteers and workplace campaigns.

Recognition by United Way, where donors and their level of giving are publicly identified, will follow these principles.

- Recognition will be appropriate and provided in a consistent manner.
- Recognition is intended to cultivate future support of the current donor base
- Recognition seeks to encourage interest and support from prospective donors

UWT honours donors' requests to remain anonymous or not have the amount of their contribution recognized publicly. Donors are provided with opportunities to indicate their wishes regarding public identification as a supporter of UWT, to confirm, and to update their directions annually.

Public recognition in printed or online materials is provided within clearly defined giving levels for individual and corporate support. These levels are communicated to all donors and prospective donors in advance of their donation. UWT recognizes total giving to the UWT campaigns and initiatives, including any donor designations to other charities, unless specifically requested by the donor to exclude certain amounts.

A donor recognition agreement must be completed with the agency or project partners for any targeted gift that is \$500,000 or more.

Donor Recognition Policy

Naming Recognition

From time to time, UWT offers donors the opportunity to make special targeted gifts. These projects may be led by agencies other than UWT and recognition may fall outside of the control of UWT. These projects may involve opportunities for naming recognition.

To ensure appropriate recognition for UWT donors in these situations, UWT staff must communicate clear expectations to the lead agency or project partner for donor recognition prior to agreeing to enter into partnership or agreeing to raise funds for projects. UWT will work directly with the donor to ensure their approval of recognition activities.

Expenses for donor recognition materials will be considered part of the overall project costs and will be included as part of the overall project budget. If a donor is funding 100% of the program costs, donor recognition may be included with the program materials, depending on the nature of the program, as determined through an agreement between UWT and the funded agency or partnership.

Naming of Programs: UWT will only consider naming of service programs in situations where individual or corporate donors fund 100% of program costs for a minimum period of 3 years. Naming will only apply to the duration a donor provides funding.

Naming in Capital Projects: UWT will use existing levels defined by the lead agency or project partner. If none have been defined, UWT will negotiate appropriate levels with the agencies and partners.

UWT does not arbitrarily change or withdraw donor gift recognition. The original form of the recognition is maintained unless it is negotiated at the time of the gift or changed through a joint agreement between UWT and the donor or their family or legal representative. If the original recognition cannot be physically maintained, it will be changed to another consistent with the original agreement. If continuation of the recognition creates a reputational risk for UWT, we reserve the right to terminate or alter the recognition.

Notwithstanding any other provisions in this Policy or other policies, a donor name for a supported project will not be approved, or if approved will be revoked, if the name may undermine the public respect for UWT. Ultimate authority to revoke an approved name rests with the Board of Trustees on the recommendation of the President and Chief Executive Officer.

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National Recognition

Annual campaign donations may be processed by UWT on behalf of other local United Ways/ Centraides in national employee workplace campaigns. The recognition of these amounts and individuals is the responsibility of the other local United Ways to recognize in their own communities, except for recognition that UWT may provide through opportunities that are specifically structured to recognize national giving on behalf of all United Ways/ Centraides.

4 - Procedures

It is the responsibility of the Vice President of Resource Development to ensure that this policy is adhered to.

Breaches of this policy will be considered a serious matter, and UWT will take both corrective and disciplinary actions up to and including termination.

UWT will respond promptly to a complaint by a donor or prospective donor on any matter that is addressed by this policy, in accordance with the policies and procedures outlined in UWT's *Complaints Policy for Members of the Public*. Complaints will be reported to the Board of Trustees at least annually on the number and type of complaints received, and actions taken as a result.