



Intent

The *Project Watershed Donor Relations Policy* outlines our approach to recognizing funders and donors. Comox Valley Project Watershed Society (Project Watershed) relies upon the trust, respect, and generosity of countless individuals as well as the community at large. The objective of this policy is to ensure that Project Watershed's relationship with its donors meets high ethical standards and complies with existing laws in Canada. In addition to this policy, potential donors can refer to other, related policies which guide our approach to working with donors and supporters (e.g. *Gift Acceptance Policy*).

Our Philosophy of Thanks

Project Watershed operates from a place of gratitude for the people, organizations, and communities that support our mission and collaborate with us daily on making tangible change. We recognize that gifts of time, money, and knowledge are acts of trust, without which we could not continue to achieve our organization's goals. When we receive a donation of financial assistance we are committed to recognizing the generosity of the giver and doing so in a timely and appropriate manner. There are many deserving organizations to which people can entrust their gifts, and when someone chooses to give to Project Watershed we want to honour that decision. The importance of saying thank you guides the way we interact with others.

Fundraising Practices

Project Watershed receives support through individual giving, corporate gifts, and financial grants. To demonstrate transparency and accountability guiding these actions, Project Watershed posts a variety of information on its website including this policy and supporting documents (e.g. *Gift Acceptance Policy*). Project Watershed staff, under oversight of the Executive Director and guidance of the Board of Directors, pursue a number of fundraising practices including:

- ▶ Grant Applications
- ▶ Corporate Outreach
- ▶ Seasonal Giving Campaigns
- ▶ Donor Events

Recognition

Our recognition practices are structured around tiers of giving, ensuring that all contributions are acknowledged in ways that are meaningful, proportional, and respectful. Each tier outlines appropriate forms of thanks and public recognition so that donors understand how their support will be celebrated, while still allowing for individual preferences and anonymity. Following are the various streams of support we receive, summarised with our response for each type of giving.

- ▶ **Membership Applications and Renewals:** When new or returning members join Project Watershed, we want to recognize their involvement in our organization and say thank you.
 - **Immediate/Short Term Acknowledgement:** An email is sent to say thank you after the application is processed.
 - **Medium Term Acknowledgement:** Members are included on Project Watershed's email newsletter for opportunities to stay involved.
 - **Yearly Acknowledgement:** Members are thanked via email for their involvement over the past year and invited to renew for another year.
- ▶ **Individual Donors:** Individual donations make up an important part of Project Watershed's funding, and due to the personal nature of these gifts should be treated in a more nuanced way. Monthly donations should be acknowledged upon confirmation of the initial payment, with recognition based on the categories below for the total value to be given during the year. To supplement the processes below, additional gifts or recognition may be offered at the discretion of the Executive Director.
 - **Donation of \$0 - \$999**
 - **Immediate/Short Term Acknowledgement:** An email is sent to thank them for their generosity.
 - **Medium Term Acknowledgement:** The donor is recognized on the website (if desired).
 - **Donation of \$1,000 - \$9,999 — Watershed Supporter**
 - **Immediate Acknowledgement:** An email is sent to thank them for their generosity.
 - **Short Term Acknowledgement:** A thank you card is sent within 1 month of receipt.

- **Medium Term Acknowledgement:** The donor is recognized on the website (if desired).
- **Yearly Acknowledgement:** The donor is acknowledged via signage (or slide, etc.) at a yearly event (e.g. Keeping it Living dinner).
- **Donation of \$10,000 - \$49,999 — Watershed Partner**
 - **Immediate Acknowledgement:** A phone call is made to the individual within 3 days of receipt to thank them for their generosity.
 - **Short Term Acknowledgement:** A thank you card is sent within 2 weeks of receipt.
 - **Medium Term Acknowledgement:** The donor is recognized on the website (if desired).
 - **Yearly Acknowledgement:** The donor is verbally acknowledged at a yearly event (e.g. Keeping it Living dinner).
- **Donation of \$50,000+ — Watershed Champion**
 - **Immediate Acknowledgement:** A phone call is made to the individual within 3 days of receipt to thank them for their generosity.
 - **Short Term Acknowledgement:** A thank you card is sent within 2 weeks of receipt extending an invitation to join a board member at a thank you lunch.
 - **Medium Term Acknowledgement:** The donor is invited to join a private tour of a project of their choice, and they are recognized on the website (if desired).
 - **Yearly Acknowledgement:** The donor is recognized at a yearly event (e.g. Keeping it Living dinner) with a special certificate presented to them.
- ▶ **Corporate Donations:** Project Watershed recognizes the corporate and business donations from the private sector that support our mission.
 - **Immediate Acknowledgement:** An email is sent to say thank you for the donation.
 - **Short Term Acknowledgement:** Within a week a follow-up call is made to the business to thank them over the phone for their support.
 - **Medium Term Acknowledgement:** The corporate donor has their logo added to the website, and they are acknowledged in one of the monthly newsletters.

- **Yearly Acknowledgement:** The corporate donor is recognized at a yearly event (e.g. Keeping it Living dinner).
- ▶ **Grant Funding:** To account for the broad number of granting streams and agencies, recognition of funding is at the discretion of the Board of Directors and the Executive Director.
- ▶ **All Other Gifts:** The recognition of other gifts that do not fall into the other categories is at the discretion of the Board of Directors and the Executive Director.

Ongoing Engagement and Impact Reporting

When a donor chooses to give their time or money to Project Watershed, they are invited to a continued collaboration with our organization. Rather than treat their gift as one moment in time, we want to recognize their interest in our ongoing activities. We achieve this in the following ways:

- ▶ Throughout the year, donors will receive email-based impact updates (e.g. feature articles). These updates will highlight successes, progress, stories, and the tangible difference donor support makes.
- ▶ A donor appreciation and stewardship event is held each Spring/Summer to thank supporters, provide updates, and build relationships.
- ▶ An Annual Impact Report is created yearly to more broadly communicate Project Watershed's impact and acknowledge/thank our donors and volunteers.

We invite all donors to attend our AGM.

Roles and Responsibilities

Project Watershed recognizes that donor communications and relations are an ongoing activity that require accountability, dedicated attention, and both Board / Staff time. To ensure that roles and responsibilities are clear, the following govern how we oversee this topic:

- ▶ The Board of Directors champions a culture that values donors and gives thanks; monitors donor satisfaction; and periodically reviews this policy. The Executive Director will regularly report to the Board on topics related to donor relations to ensure continued success and visibility of efforts.



- ▶ The Executive Director ensures systems, staffing, and resources are in place for successful and timely donor recognition. The Executive Director may assign a designated staff member to act as a Donor Relations Lead who will regularly report to the Executive Director.
- ▶ A Donor Relations Lead ensures donor communication and recognition activities are completed on schedule and may delegate specific tasks to other staff as necessary.

Tax Receipts

Tax receipts for donations received are issued based on the type of donation and frequency, generally as follows:

- ▶ Single Donation (via Online Payments, E-Transfer, Cheque, Cash Payments) tax receipts are issued within two weeks of receipt.
- ▶ Single Donation (via CanadaHelps) tax receipts are processed immediately via CanadaHelps.
- ▶ Monthly Donations receive tax receipts in January, with a total to capture the total amount donated in the previous year.

Privacy and Donor Rights

Project Watershed aims to celebrate the people, organizations, and communities that support our mission in a public-facing way when appropriate. Our website, print publications, and digital newsletters may include the names of all donors who have provided a gift. We may also mention donors who have given to the organization at special events.

Our aim, however, is not discount any person or organization's privacy, and if a donor does not wish to have information about their identity or donation disclosed they may make a request for anonymity. We will not post or mention a name publicly if a donor does not want us to.