



LEGACY BRISBANE POLICY

Fundraising – Donor Recognition

Policy number: FR-11

Effective date: 27 June 2022

Approving authority: Board of Directors

Sponsor: Fundraising, Marketing and Communications Manager

Web address: <https://www.legateeguide.org.au/>

Date for review: 27 June 2027

Purpose	This document establishes Legacy Brisbane’s policy for accepting, processing, using and recognising donations for the Legacy House Capital Campaign.
Policy Statement	Legacy Brisbane acknowledges the importance of recognising the support provided by its many supporters and benefactors. Legacy Brisbane and, specifically, the Head – Fundraising, Marketing and Communication is responsible for implementing our Donor Recognition Policy for the Legacy House Capital Campaign, as well as Donor Recognition for Legacy Brisbane in general.
Who should read this policy	Board of Directors, Legatees, staff and relevant volunteers
Scope	All donors to the Legacy House Capital Campaign.
Definitions	Definitions of terms used in this policy are provided in Appendix 2.

Policy

The Head of Fundraising, Marketing and Communications

- Oversees our major gift donor development and fundraising-related activities and provides guidance to ensure effective and appropriate recognition of the donors' support is provided by Legacy Brisbane.
- Ensures our employees adhere to the organisation donations policy and recognition program.
- The Head of Fundraising, Marketing and Communications also can update or change the Donor Recognition Policy, in consultation with the organisation leadership, where appropriate.

The recognition policy is based on the following principles:

1. All donations to the organisation must be registered through the CRM;
2. Adoption of the Donor Recognition Table (Appendix 1), which uses a single recognition principle i.e., the accumulated funds (or estimated accumulated value of non-financial payments) received from a donor;
3. Adoption of a commencement date of 27 June 2022 to calculate accumulated totals/values;
4. Recognition of donors prior to 27 June 2022 will be at the discretion of the relevant executive and leadership positions, in consultation with the Head of Fundraising, Marketing and Communications, Legacy Brisbane;
5. The establishment of special recognition programs for specific campaigns and projects undertaken by Legacy Brisbane, and the maintenance of existing recognition arrangements, are not precluded by the program. However, all arrangements that fall outside the program must be approved by the relevant executive and leadership positions, in consultation with the Head of Fundraising, Marketing and Communication of Legacy Brisbane. All donations will add to the accumulated totals given by the donor(s);
6. The policy will be reviewed every five years to ensure that the defined levels of recognition retain comparable economic value and that the benefits for each level of recognition remain appropriate;
7. The periods over which donors are recognised may vary according to the specific nature of the gift.
8. None of the recognition tokens available through the Donor Recognition Program shall be available for sale, or used in any other promotional activity, thereby ensuring the exclusivity of the range and symbolism of the donor relationship. Recognition tokens will be sufficiently distinct from commercial memorabilia items so as not to be confused.
9. Though the Capital Campaign will primarily seek cash donations Legacy Brisbane will consider gifts in kind or pro bono support that will directly

offset the project cost to the value of \$25,000 and above.
Acknowledgement for a gift in kind can/will be recognised along with all cash donations at the value that Legacy would have paid for that service or product. The value of the gift in kind will be confirmed by Legacy Brisbane.

Recognition of major donors is one of the most important and critical aspects of a major giving program. Planning and consideration of the process to follow receipt of a gift begins long before the actual event.

How we say thank you reflects the character and consideration of Legacy Brisbane, judgment of the staff and leadership, and a predictor for our future fundraising successes. Donor recognition helps bind our donors to our organisation and acknowledges that it is their personal or corporate connection that indicates what and why they decide to give.

Major donors should be recognised sincerely and accordingly to the amount of their contributions. Successful recognition is done by first knowing more about the donor.

General Campaign Recognition

Campaigns provide opportunities and momentum for donor relations and stewardship. They also create increased administrative work and often require an increase in resources.

Resources for everyday stewardship work will be used over the course of a campaign. In developing these resources, marketing, communications, and campaign staff will be consulted and will collaborate when developing the material.

The use of a donor wall or electronic screen may be appropriate to mark the end of a campaign. This would be done in consultation with program managers and other relevant leadership.

Legacy Brisbane will combine acknowledgement of campaign donors with other general donors.

Electronic recognition

Where appropriate, electronic donor recognition can be used for donor recognition. This includes websites, Twitter, Facebook, Instagram, YouTube, LinkedIn, Wikipedia, digital donor boards and print publications.

In all cases, donors must give approval for their name to be published

and be given the option to remain anonymous.

The Capital Project Recognition

General

Legacy Brisbane will acknowledge monetary gifts given to capital works projects. Acknowledgement for substantial investments will be attributed on a donor board, and would include a range of other benefits. As a rule of thumb, up to 1% of the donor gift will be spent on donor recognition.

Legacy Brisbane will work with the architect to create a donor board and individual donor recognition that fits into the design intent of the new Legacy House. This may involve engaging a local artist to create a pattern and incorporate the name of donors on the donor board/commissioned art located in public areas. This board/work of art will be commissioned as a new initiative to acknowledge donations towards capital works projects. This donor recognition will be recognised in three ways for the Campaign.

1. Main Donor acknowledgment in [key area of the building] in the form of [artwork/installation] recognising donors of \$25,000 and over.
2. Donors of \$100,000 and above will also receive a personal small-scale framed commemorative [artwork/token] derived from an art pattern featured on the donor boards in recognition of their support and this will be displayed in designated space Legacy Brisbane within the building.
3. In addition, a small-scale commemorative artwork derived from an art pattern feature on the donor board will be personally given to donors of \$75,000 and above.

Gifts that meet the terms and conditions as set out in this policy will be accorded the benefits outlined in the donor recognition table.

A Donor's name will not be included in the donor recognition if Legacy has not received 50% of the pledged amount.

Naming Opportunities

A formal arrangement of acknowledgement between Legacy Brisbane and each donor will be discussed at the time of donation. Legacy House will not grant naming opportunities to the main building but will consider offering naming opportunities to key areas of the new Legacy House.

The decision to offer an opportunity for naming will usually be based on one or more of the following:

- philanthropy - to recognise a Donor who has made a significant financial Gift; and
- honour - to recognise an outstanding individual or entity for distinguished service and/or community, and who exemplifies Legacy Brisbane's values.

Where a naming opportunity is offered by Legacy Brisbane, a Donor is under no obligation to associate their own name to the naming opportunity.

Gift Terms

- When named recognition is a benefit of a Gift, the written Gift Agreement or Pledge Gift Agreement should be signed by both the Donor and an appropriately authorised representative of Legacy Brisbane before naming takes place.
- Name recognition will take place following the fulfilment of the pledge, or after at least 50% of the Gift has been received.
- Named recognition is given to the Donor as Legacy Brisbane's response to a philanthropic Gift and is not an obligation of Legacy Brisbane unless it forms part of a formal Gift Agreement.
- Named recognition is symbolic of the Gift and does not entitle the Donor to any form of ownership or control of the named building, physical space, equipment, or non-physical entity.
- Named recognition is subject to satisfactory assessment by the Legacy Brisbane of the funding arrangements for the cost of the project concerned.

Term of Naming Rights

As a rule, all named facilities will be reviewed every five (5) years. This will not affect a Gift agreement except in the following circumstances:

- On occasion a named building or physical space may need to be repurposed or demolished. Should this occur Legacy Brisbane would apply naming rights to another or subsequent appropriate building or physical space for the remaining term of the Gift Agreement in consultation with the Donor.
- Term naming - A name may be approved over a set period as set out in the Gift Agreement.
- Life of Term – Generally the naming of buildings and physical spaces will be granted for a minimum of five (5) years.
- It is recommended that named recognition of buildings and physical spaces will have a maximum ten (10) year term.
- Named recognition of buildings and physical spaces will not extend beyond the life of the space.

Removal of Named Recognition

Legacy Brisbane reserves the right to decline or terminate any named recognition Gift Agreements at any time.

A clause shall be inserted in all Gift Agreements to allow Legacy Brisbane to withdraw from such an agreement if the name of the individual or organisation comes into disrepute in Legacy Brisbane or in the general community or if the Donor is in breach of the Gift Agreement, for example if pledge payments are missed.

In such an instance, the CEO would advise Legacy Brisbane's Board that the use of the name be discontinued, and the relevant Agreement terminated.

Stewardship

At times it may be appropriate to offer a Donor the opportunity for a small reception or other opportunity to celebrate their Gift. This should not be a requirement of the Gift, but rather can be offered as an additional benefit when agreed with the CEO. The costs of the event should be proportionate to the benefit and size of the Gift.

Designation of Spaces

Legacy Brisbane acknowledges that different spaces within its buildings have distinctive characteristics with some spaces holding a higher visibility profile. It is acknowledged that location of donor boards will be clearly identifiable by visitors and clients. Legacy Brisbane's will be flexible in the designation of spaces but has the right to determine the location of donor recognition. The style of donor board will be consistent with the architect's design intent of the building.

All donor recognition will be developed with the Legacy House Project Team to gain the best visible and appropriate public viewing.

Type of Acknowledgement

- Text acknowledgement of donors will be incorporated into the main Campaign donor board in chronological order and separate individual artistic donor boards for donors that are \$75,000 and above.
- A 'Donor Thank You' event will also be arranged to acknowledge all donors who have contributed towards this Campaign.
- An Opening Ceremony will also take place.

Main Campaign Donor Board

The main artistic donor board to be fixed in the new Legacy House will incorporate all donors that have pledged \$25,000 and above to the Legacy House Capital Campaign. The design of the artwork/installation will be developed in cooperation with Legacy House architect, Project Team and Campaign Office. The artwork/installation will represent donors by personal name or business name and be displayed in chronological order within the artwork. This artwork/installation will also have a 'thank you' message attached next to the artwork/installation and recognise the Chair and Patron/s of the Campaign.

Corporate logos and brands will not be represented within the buildings or on the outside or on the main Campaign Donor board.

A company, organisation or foundation name, or the name of an individual, can be included.

Individual Artistic Donor Board

Each donor who pledges \$100,000 or above will be recognised in common areas around the building. Legacy Brisbane does not 'name' rooms as such so each common room/area will include a commissioned piece of art which reflects the main Campaign donor board.

Placement of individual donor boards will be in consultation with the Legacy House Project Team

The artwork will represent individual donors by personal name or business name. Corporate logos and brands will not be represented on any of the individual artistic donor boards.

Selection of the artist/vendor

The artist/vendor should represent the building's character and its use, and the artwork should reflect the values and standards of Legacy Brisbane. A clear brief will be presented to the artist or representative of the artist. The brief should contain the purpose of the building, construction images, stories, and material descriptions.

For the Campaign, it would be envisaged that a link between Legacy Brisbane, and the veteran community would be represented in the artwork.

1.6 Contractual arrangements

Where an arts management company is engaged to manage the selection and production of the donor board, a contract will be prepared that outlines the roles and responsibilities of the company and Legacy Brisbane, the time frames for a concept design, payment of invoices and the production of the artwork. The appropriate process for this action must be followed.

1.7 Capital Project Recognition table

Below is the Capital Campaign recognition table. It outlines the different levels of support and recognition that need to be followed in all cases.

Conclusion

All campaign Donor Recognition needs to be strictly adhered to, to avoid conflict or disadvantage to any donor that is participating in the Capital Campaign. Each donor will be treated with equal respect and courtesy in all communications.

This policy has been created to ensure that every donor receives appropriate acknowledgement.

Budget

An appropriate budget of as been set aside for the main and individual artistic donor boards. This includes production, installation etc.

Roles and responsibilities	Head of Fundraising, Marketing and Communications is responsible for implementing this policy and updating and reviewing as required in consultation with the CEO. They are also responsible for allocating and managing the donor recognition budget. The CEO's role is to support the implementation of this policy, ensure that the Board is informed of key recognition prior to confirmation, and that all recognition supports the mission of the organisation and does not bring the organisation into disrepute
Evaluation and review	Evaluation and review of this policy will be conducted by the Fundraising, Marketing and Communications Manager and the policy sponsor each two years. Following review, recommendations for change will be forwarded to the approving authority.
References and linkages	Legacy Statutes - Annexes A, B and D to The Code of Legacy.
Appendix	Appendix 1 – Capital Project Recognition table Appendix 2 – Definitions

Appendix 1 – Capital Project Recognition table

Donor category and gift levels→	Foundation	Leadership	Major	General	Other
Donor recognition					
Relationship manager	✓	✓	✓	✓	✓
Donations are tax deductible	✓	✓	✓	✓	✓
Certificate of appreciation	✓	✓	✓	✓	x
Recognition in annual report	✓	✓	✓	x	x
Recognition on main artistic donor board	✓	✓	✓	✓	x
Individual donor board artwork	✓	✓	✓	x	x
Text only naming acknowledgement within the premises	✓	✓	✓	x	x
Recognition in opening speeches	✓	✓	✓	x	x
Recognition on supporter's web page	✓	✓	✓	✓	x
Invitation to building opening event	✓	✓	✓	✓	✓
Personal thank you meeting with the Chair	✓	✓	✓	✓	✓
Bi-annual meetings and reporting on relationship and relevant program delivery	✓	✓	✓	✓	x
Personalised letter of thanks	✓	✓	✓	✓	✓
Opportunity to serve on [organisation name] volunteer advisory boards	✓	✓	✓	✓	x
Invitation to tour [key sites]	✓	✓	✓	✓	x

APPENDIX 2 DEFINITIONS

Capital Campaign a sequential fundraising initiative that seeks to raise a specified sum of money within a defined period to meet an identified and specific organisational capital or program need. A capital campaign is led by volunteer advocates and usually spans several years and seeks multiyear gift commitments.

Corporation means an entity incorporated under the Corporations Act 2001 (Cth) and established for the purpose of profit.

Director means a person who is appointed or elected to the position of a director of an Organisation or a Corporation.

Donation means a voluntary contribution by a Donor of money, property, goods or services to an organisation for the purpose of furthering that organisation's objects. It does not include a sponsorship or community business partnership.

Donor means an individual or other entity that makes a contribution of value to an Organisation to further the Organisation's Objects. A Donor includes prospective Donors and an individual or entity that has previously made a Donation. A Donor does not include an individual or entity that engages with an Organisation for the purpose of trade.

Donor Recognition the process and practice of acknowledging a donation. This acknowledgement can happen in a variety of ways, including donor recognition walls, acknowledgment on website and in communication items, thank you letters. The aim is to emphasise the organisation's appreciation.

FIA means Fundraising Institute Australia.

FIA member means a person or organisation who is registered as an FIA member.

Fundraiser means a person, Corporation or Organisation, who carries out activities, whether for remuneration or as a volunteer, for the purpose of raising Donations for the Objects of an Organisation.

Gift Agreement a document drafted by the organisation and signed by the donor and the organisation to set expectations and prevent misunderstandings. Elements include any restrictions on the donation, how and when the donation will be made, recognition, naming opportunities and what reports will be provided to the donor.

Naming Opportunities: is a form of donor recognition that publicly acknowledges by name a generous gift or distinguished service to an organisation. Most commonly it is placed on a building or space within a building or attached to a key program or service.

Objects means the objective, purpose or cause, however so defined in an Organisation's constituent documents.

Organisation means an entity incorporated under Commonwealth, State or Territory legislation and established for a purpose other than profit.

Pledge: A commitment to donate. A pledge can be received verbally or in writing and can be made up of multi-gift instalments or a single gift to be received sometime soon.

Promotional Material means any material in connection with a Donation, Fundraising Activity or an Organisation whether in printed, electronic or verbal form made available by a Fundraiser or Organisation to any person.

Stewardship is the relationship-building process that starts after a donor makes a gift to an organisation. This term may be used to describe a specific action that occurs during the stewardship phase including recognition for that support, as well as regular reports on the use and results of the funding.

Tax means all taxes payable in connection with a Fundraising Activity, including without limitation income tax, pay as you go (PAYG) and good and services tax (GST).

Trade Mark means a word or group of words, logo, image, colour, scent or shape (whether registered or unregistered) used by an Organisation to identify the Organisation.

Volunteer means a person who performs a service for an Organisation without requiring compensation for performing the service.