

Policy Statement

If the Foundation (EGEF) is to be successful, it must recognize its donors and thank them for their generosity in a way that takes into consideration the Foundation's legal and financial framework. The Foundation should have a program that is encouraging to the donors and treats them as a vital part of the community.

Definitions

A **donor** is a person who donates to the Foundation, regardless of the size or form of the donation.

A **member** of the Foundation is a donor who gives at least the size of donation that qualifies for membership, as set from time to time by the board, agrees to be a member and complies with any legal requirements of membership.

An **employee** is anyone hired by the Foundation either as staff or a contractor.

Scope

This policy applies to donors and members of the Foundation as well as those employees and volunteers of the Foundation who undertake activities that interact with donors or members.

Policy Provisions

The Foundation should take advantage of the many opportunities for thanking its supporters throughout the year, such as recognizing donors at special events, in public settings, in print materials, in an annual honour roll of donors, in a prominent display on its virtual donor wall on the EGEF website and through other website recognition.

Each donor is recognized in one of the following categories.

Platinum (\$1 million plus)

Recognition at campaign gala, profile in annual report and campaign publications, prominent display at top level on donor-recognition virtual wall, naming opportunity to be selected in concert with the recipient donee and website recognition (news announcement, article)

Diamond (\$500,000 - \$999,999)

Recognition at campaign gala, profile in annual report and campaign publications, prominent display at second level on donor-recognition virtual wall, naming opportunity to be selected in concert with the recipient donee and website recognition (news announcement, article)

Gold (\$250,000 - \$499,999)

Recognition at campaign gala, profile in annual report and campaign publications, prominent display at third level on virtual donor wall, naming opportunity to be selected in concert with the recipient donee and website recognition (news announcement, article)

Silver (\$100,000 - \$249,999)

Recognition at campaign gala, profile in annual report and campaign publications, prominent display at fourth level on virtual donor wall, naming opportunity to be selected in concert with the recipient donee and website recognition (news announcement, article)

Bronze (\$50,000 - \$99,999)

Recognition at campaign gala, listing in annual report and campaign publications, prominent display at fifth level on virtual donor wall, naming opportunity to be selected in concert with the recipient donee and website recognition (news announcement, article)

Patron (\$25,000 - \$49,999)

Recognition at campaign gala, listing in annual report and campaign publications, prominent display at sixth level on virtual donor wall and website recognition (news announcement, article)

Partner (\$10,000 - \$24,999)

Recognition at campaign gala, listing in annual report and campaign publications, recognition on donor virtual wall and other website-recognition (news announcement, article)

Supporter (\$5,000 - \$9,999)

Recognition at campaign gala, listing in annual report and campaign publications, recognition on donor virtual wall and other website recognition (news announcement, article)

Friend (\$1,000 - \$4,999)

Listing in annual report and campaign publications, recognition on virtual donor wall and other website recognition (news announcement, article)

Donor (\leq \$999)

Listing in annual report and campaign publications, recognition on virtual donor wall and on other website pages (such as related project page)

Procedures

Before publicly recognizing donors, be certain you have their permission. You also should know the exact way they wish to be listed—corporately, individually, with professional credentials, as a couple or anonymously.

Formalizing commitment agreements

For all gifts that are to be received in a schedule of payments rather than a lump sum:

- Request of the donor a signed letter of intent and payment schedule

- Issue a statement to the donor of what type of recognition the donor may expect and when the Foundation will confer that recognition

How and when gifts will be recognized

For all gift levels at the supporter level and above, a signed letter of intent and payment schedule must be received before the gift will be included in any recognition materials or any campaign publications.

Other gifts will be mentioned in the first update to be published after the gift or pledge is received and then in the final donor honour-roll listing.

For donor levels beginning with Supporter, each donor who is willing, would be interviewed for some information about their reasons for donating. All donors would be included in a news announcement and a single article (website and annual report).

Please see the attached sample letters appropriate for the various levels of gift.

Platinum / Diamond Gift Level

The gift may be made as a multiple-year pledge, but must be at least two-thirds completed before any physical plaque, window engraving or the like will be installed. Language must be approved by the donor. Additionally, the gift will be listed on all other campaign-recognition materials, such as campaign reports and updates and in any cumulative campaign-recognition efforts, including the full campaign-recognition virtual donor wall. Such recognition will begin as soon as a signed letter of intent for the pledge is received. Naming rights would be secured in perpetuity, if possible.

Gold / Silver / Bronze / Patron & Partner Level

Donations may be a one-time gift to establish a named endowed fund to support a program. Recognition would include prominent mention in all materials related to the program, the annual report and on the website. Once the fund is established, participants in the program would be referred to as the "(Donor name) Bursary/Scholarship/Program."

Sample language for naming and plaques

All plaque language must be approved by the donor before ordering, but it should conform to basic standards adopted by the organization. Wording on a plaque in a donee's space will also require the approval of the donee.

Example: The wording on the plaque honouring Doug Ruth, located in the student lounge of the EITC at the University of Manitoba, was a collaborative effort of the Foundation Board members and required the approval of the University of Manitoba, which chose the size, material and typeface. Fifteen-year naming rights were granted by virtue of a \$50,000 donation by the Foundation to the University's Price Faculty of Engineering Strategic Initiatives Fund.

Naming Opportunities

As a part of the Foundation donor-recognition program, the Foundation will offer major donors special opportunities to have their names, or the name of a loved one, associated with a specific facility

space or program. Other opportunities may include naming scholarships, bursaries, research funds, publications, conferences, seminars, programs and new initiatives.

Situations that may require legal advice

The Foundation should seek legal advice if there is any uncertainty about how to handle the following situations:

- Removing a donor's name from a named project; Examples:
 - If the donor requests that their name be removed, the situation may be quite straightforward, requiring only the mutual agreement by all affected parties as to who does the removal and at whose cost. Legal advice may be required to draw up a contract or agreement.
 - If the Foundation deems that a situation may call for a donor's name to be removed, most probably legal advice should be sought, in addition to thorough discussion by the Board.
- Handling a merger (of donor company or donee), donor name change, dissolution of donor company or donee, etc.
- Material change in the location of a named building, centre or similar facility

Version 3 approved on November 29, 2023 by the board of the Foundation.

Donor Recognition Policy

Engineering and
Geoscience Education
Foundation Inc.

Sample letter to be sent by the Foundation on receipt of a donation.

[For large donations of \$50,000+]

Engineering and Geoscience Education Foundation Inc.
382 Inglewood Street
Winnipeg, MB R3J 1X2

[donor name and address]

Dear [donor name]:

Thank you for your generous donation of [dollar amount or other donation] to the Foundation.

[It's a large donation so place here the custom content based on the type and amount of the donation.
Include:

- What it will be used to build or add, or other purpose of the donation
- Confirm the schedule of payment
- If it is creating a named fund either with the Foundation or The Winnipeg Foundation ask or confirm the name of the fund
- Who it will help
- When the donation will be realized, if there is something physical like a building
- How and when it will be recognized, based on the category]

The Foundation is honoured that you have chosen us as the organization that can assist you in supporting the [engineering/geoscience] profession in the way you wish. Thank you again and please contact me if you have any questions.

John Smith, President

Donor Recognition Policy

Engineering and
Geoscience Education
Foundation Inc.

[For medium donations between \$5,000 and \$50,000]

Engineering and Geoscience Education Foundation Inc.
382 Inglewood Street
Winnipeg, MB R3J 1X2

[donor name and address]

Dear [donor name]:

Thank you for your generous donation of [dollar amount or other donation] to the Foundation.

[It's a medium donation so place here the custom content based on the type and amount of the donation. Include:

- What it will be used to build, add or other purpose of the donation
- Confirm the payment schedule if there is one
- if >\$10,000 and it is creating a named fund either with the Foundation or The Winnipeg Foundation ask or confirm the name of the fund
- Who it will help
- When the donation will be realized if there is something physical like a building
- How and when it will be recognized, based on the category]

The Foundation is honoured that you have chosen us as the organization that can assist you in supporting the [engineering/geoscience] profession in the way you wish. Thank you again and please contact me if you have any questions.

John Smith, President

Donor Recognition Policy

Engineering and
Geoscience Education
Foundation Inc.

[For donors \$10-\$1,000]

Engineering and Geoscience Education Foundation Inc.
382 Inglewood Street
Winnipeg, MB R3J 1X2

[donor name and address]

Dear [donor name]:

Thank you for your generous donation of [dollar amount or other donation] to the Foundation.

The donation will be used to further the work of the Foundation in supporting the education of students of engineering and geoscience in Manitoba universities. The Foundation provides funds to create or enhance physical learning spaces as well as providing financial assistance to students.

Examples include the Design Lab (Room 229) at the University of Manitoba and the Geoscience Gallery at Brandon University. The Foundation also provides bursaries to students in the Internationally Educated Engineers Qualification (IEEQ) program.

We will be recognizing your donation in our annual report and on our website unless you prefer to remain anonymous.

A charitable donation receipt for tax purposes will be sent to you at [donor email address] in February of next year.

If you wish to become a voting member of the Foundation and have a say in the future direction of the Foundation, please let us know the name, email and postal addresses at which we may communicate with you to provide necessary information.

The Foundation is honoured that you have chosen us as the organization that can assist you in supporting the [engineering/geoscience] profession in the way you wish. Thank you again and please contact me if you have any questions.

John Smith, President