

**DONOR AND MEMBER RECOGNITION POLICY:
BOOK OF GRATITUDE, MEMORIAL PLAQUES AND
MEDITATION GARDENS MEMORIAL DEDICATIONS**

EFFECTIVE DATE: April 4, 2018

POLICY STATEMENT AND RATIONALE:

FirstU has a number of means of recognizing members and congregants who have made significant contributions to FirstU and those who have passed away.

The Book of Gratitude is a formal record of those who have supported this congregation, above and beyond their important annual pledges, by generous donations to capital campaigns, in memory of loved ones, through bequests/end of life gifts, or with significant gifts. As such, the book is a historical document, a significant and valuable document among the assets of the congregation. Entries into the Book of Gratitude will be made in accordance with the criteria and protocols outlined below.

Memorial Plaques may be placed in memory of congregation members or long-term supporters. A donation of record is expected to be made at the time of placement of a memorial plaque.

Memorial plantings and structures in the Meditation Gardens provide a place for loved ones to spend time in the beauty of nature to remember and honour the person they have lost. Donations will cover the cost of the planting, structure or other dedications, including purchase, placement and maintenance.

POLICY DETAILS

A. Book of Gratitude

Criteria for Inclusion in the Book of Gratitude:

Names will be added to the Book of Gratitude in compliance with these criteria:

1. Bequests or end-of-life gifts of \$2,000 or more when there is no specific designation for a particular fund or use of the gifts.
2. Gifts of \$1,000 or more in memory of a person or a couple. (Only the name(s) of those honoured will be entered - not the name(s) of the donor(s).)
3. Gifts of \$5,000 or more to a capital project such as the Elevator project, or the Building Renewal project.
4. Gifts of \$10,000 or more which are designated for a particular fund or use of the gifts.

Protocols

1. A "Custodian of the Book of Gratitude" will be responsible for the care and upkeep of the Book.
2. No one but the Custodian will be allowed to access the Book unless they have been instructed and authorized by the Custodian.
3. The Custodian will ensure the book is handled carefully, including being protected from sunlight, as is required for the type of paper used in the Book.
4. The Custodian will regularly change the pages that are on display in the case.
5. The Case with the Book will be kept at the back of the pews in Worship Hall.
6. The Custodian will maintain an electronic copy of the Book on the congregation website.

7. The Custodian will, at least annually, obtain from the Office, the names of donors who meet any of the criteria. The Custodian will obtain costs for adding the new names and submit the estimates for inclusion in the appropriate section of the congregational budget. A tight budget or unforeseen cash flow problems may delay updating the actual book, but the website copy will be updated to show the latest donors.
8. When additions to the Book are required, and the costs will be covered in the budget, the Custodian will engage a calligrapher to create the new entries.

B. Memorial Plaques

Criteria for Memorial Plaques

Memorial Plaques may be placed on the designated columns in Worship Hall in compliance with these criteria:

1. Upon request of the family in memory of a congregation member, **a non-member beloved by the congregant, such as a family member**, or long-term supporter of the congregation.
2. A donation of \$50 or more is expected. Where the donation exceeds the costs involved, the excess funds will be placed in the Memorial Fund. (See Finance Policy regarding Memorial Fund for its uses and authorities)

Protocols

1. Requests for Memorial Plaques will be made to the Operations Manager who will be responsible for ordering the plaque and ensuring appropriate placement.
2. The Operations Manager may also, from time to time, increase the expected minimum donation for a Memorial Plaque to ensure that the donated amount covers associated costs.

C. Meditation Gardens Memorial Dedications

The development and maturity of the Meditation Gardens has been fostered through encouraging the planting of memorial dedications. As of 2019, there were 47 commemorations consisting of 35 tree species, 7 shrubs (lilacs, weigela, currant), and 5 other dedications such as structures, benches and bird baths.

Criteria for Meditation Gardens Memorial Dedications

Memorial dedications will be considered using the following criteria:

1. Dedications and commemorations may be placed in memory of a Congregation member, active supporter of the Congregation and in remembrance of their loved ones. Dedications and commemorations may also be made for individuals who have made a significant contribution to the Congregation.
2. A donation will be expected sufficient to cover the cost of the dedication, including the costs of the material (plant or otherwise), the memorial marker, placement and a contribution to overall Gardens maintenance costs. Where the donation exceeds the initial costs, the excess funds will be placed in the Meditation Gardens special purpose account.
3. Due to space constraints and changes to the water table due to neighbouring development, memorial tree plantings will no longer be considered. The Friends of the Meditation Gardens will maintain a list of plants and other commemorative options that will be considered (e.g. structures, benches, bird baths and possible other options such as etched stones or bricks). Donors will be advised of the impermanent nature of Garden memorial dedications.

Protocols

1. Requests for dedications will be made to the Operations Manager who will forward them to the chair of the Friends of Meditation Gardens for consideration.
2. To maintain the integrity of the Gardens, the Friends of the Meditation Gardens will have the final say in plant selection and in the design and placement of other commemorative items. The Operations Manager will be advised of decisions and a record of dedications will be maintained.
3. The timing of fulfilling memorial requests will be decided upon by the Friends of the Meditation Gardens, considering things such as the availability of team members to water new plantings.

D. GENERAL

The Board of Directors or congregation may request a memorial dedication (Memorial Plaque or Meditation Gardens memorial dedication) in memory of a congregant who have made a significant contribution to the congregation, either financially or as a volunteer. The cost of the memorial dedication requested by the Board or congregation will be covered from the Memorial Fund.

AUTHORITIES:

The Board will appoint the Custodian of the Book of Gratitude for either a set or indefinite term. The Operations Manager will make decisions about Memorial Plaques in accordance with the criteria and protocols outlined above.

The Friends of the Gardens will make decisions about Meditation Gardens Memorial Dedications.

WHO DRAFTED THIS POLICY: Bob Armstrong (initial policy on Book of Gratitude); Eva Berringer and Jen Brennan (update to include memorial plaques), Bob Armstrong, Custodian of the Book of Gratitude (original Book of Gratitude Policy), Susan Mellor of the Friends of the Meditation Gardens (draft Gardens Memorial Policy).

WHO IS RESPONSIBLE TO REVIEW/UPDATE OR AMEND THIS POLICY: Custodian of the Book of Gratitude, Operations Manager, Friends of the Meditation Garden

WHO APPROVES THIS POLICY AND ITS AMENDMENTS: Board

DATE OF INITIAL APPROVAL: April 4, 2018 (Book of Gratitude Policy)

REVISION HISTORY

Revision Date	Version	Comment
April 4, 2018		Approval of Book of Gratitude Policy
Nov. 2019	2	Book of Gratitude policy expanding to include other forms of donor and 'in memoriam' recognition
September 2021	3	Amendment to include plaques for non-members beloved by the congregant, such as a family member.