



## **STEWARDSHIP OFFICER TERMS OF REFERENCE ANNEX A**

References:

Nil

### **DETAILED TASKS BY MONTH**

1. **Every Month:** The Foundation Treasurer will send tax receipts and a photo copy of any letter and the cheque for each donation of \$100 or more.
  - a. For donations up to \$4,999 the Stewardship Officer will send off a thank you letter enclosing the tax receipt. If possible personalize the letter. This is done if you know the donor; if his letter or cheque gives you some information to use; or if the donation came out of a specific event such as a dinner, Friends of the Regiment outing etc. The internet sometimes provides information about an individual or organization making the donation which you can use to personalize the letter.
  - b. For donations of \$5,000 or more, immediately send the tax receipt by Canada post to the HCol and send an email to him that it is on the way. Then draft a thank you letter for his signature and email that to him. He will sign the letter, enclose the tax receipt and send it off.
  - c. Check whether a reminder of a pledge should be sent out. Send it out about six weeks ahead of the agreed upon pledge date. Send the reminder out in November along with the written report mentioned in para 4b.
  - d. Keep the Foundation Directors and Honorary Colonel informed of significant events.
  - e. You are Mr Thank You. If you notice someone on the Foundation or in the unit or Association doing a good job for the Foundation, send off a note to the HCol or CO or Association President pointing it out.
2. **April:** Prepare a narrative report on the Foundation donations for the Foundation Directors. Note the total donations since the last report and anything of significance such as major donors and pledges.
3. **July:** Redraft the stock thank you letter.
4. **September/October:**
  - a. Thank all donors of \$1000 or more during the past 12 months by telephone. The unit does this; the CO and RSM choose volunteers to make the calls. Provide the CO with the list including names, contact numbers, information about donation patterns including whether the donation was designated to something like the bursary or vehicle restoration or ceremonial uniforms. Follow-up to see that it has



been done. This is NOT a *direct* appeal for more donations.

- b. Send off a written report to all donors over \$2500. Include:
  - i. What we have done with the money in the past year and plans for the upcoming year. This information can be gleaned from the Foundation financial statements and the budget.
  - ii. Warning of any events to which they might be invited.
  - iii. This is NOT a *direct* appeal for more donations.

5. November:

- a. Prepare a narrative report on the Foundation donations for the Directors. Note the total donations since the last report and anything of significance such as major donors and pledges.
- b. Prepare a Christmas card list for the CO. Include name and contact details for all donors of \$1,000 or more.
- c. Two months prior to the Anniversary Dinner remind the CO of any major donors (over \$5,000.) who should be invited to dinner.

6. December:

- a. Prepare the list for publication in the Association Newsletter. The list reflects donors of \$100 or more for that calendar year. The list is broken into categories. Ask the Foundation Treasurer for the data on Excel format.

The Princess of Wales' Own Regiment