



# Fundraising Policy and Procedure

## Donors' Policy

Effective Date: May 1, 2012

### 1. Purpose

To ensure that Donor's are treated in accordance with Imagine Canada's Ethical Fundraising and Financial Accountability Code.

### 2. Policy Statement

All Donor's shall be treated in accordance with Imagine Canada's Ethical Fundraising and Financial Accountability Code and to provide an avenue for Donor's to complain.

### 3. Procedure

- All donors (individuals, corporations, and foundations) are entitled to receive an official receipt for income tax purposes for the amount of the donation.
- Donors of non-monetary eligible gifts (or gifts-in-kind) are entitled to receive an official receipt that reflects the fair market value of the gift. (Note: The term 'Eligible gifts' is comprehensively defined by CRA. A full definition can be found in CRA's Interpretation Bulletin dealing with gifts and official donation receipts. Some common gifts, such as donations of volunteer time, services, etc. are not eligible to receive official tax receipts.)
- The charity's governing board may establish a minimum amount for the automatic issuance of receipts, in which case smaller donations will be receipted only upon request.
- All fundraising solicitations by or on behalf of the charity will disclose the charity's name and the purpose for which funds are requested.
- Printed solicitations (however transmitted) will also include its address or other contact information.
- Donors and prospective donors are entitled to the following, promptly upon request:
  - the charity's most recent annual report and financial statements as approved by the governing board;
  - the charity's registration number (BN) as assigned by CRA;
  - any information contained in the public portion of the charity's
  - most recent Charity Information Return (form T3010) as submitted to CRA;
  - a list of the names of the members of the charity's governing

- board; and
  - copy of this Ethical Fundraising & Financial Accountability Code.
- Donors and prospective donors are entitled to know, upon request, whether an individual soliciting funds on behalf of the charity is a volunteer, an employee, or a hired solicitor.
- Donors will be encouraged to seek independent advice if the charity has any reason to believe that a proposed gift might significantly affect the donor's financial position, taxable income, or relationship with other family members.
- Donors' requests to remain anonymous will be respected.
- The privacy of donors will be respected. Any donor records that are maintained by the charity will be kept confidential to the greatest extent possible.
- Donors have the right to see their own donor record, and to challenge its accuracy.
- If the charity exchanges, rents, or otherwise shares its fundraising list with other organizations, a donor's request to be excluded from the list will be honoured.
- Donors and prospective donors will be treated with respect.
- Every effort will be made to honour their requests to:
  - limit the frequency of solicitations;
  - not be solicited by telephone or other technology;
  - receive printed material concerning the charity.

### **Donor Complaint Process**

- The charity will respond promptly to a complaint by a donor or prospective donor about any matter that is addressed in the Ethical Fundraising & Financial Accountability Code.
- The Development Manager will attempt to satisfy the complainant's concerns in the first instance.
- A complainant who remains dissatisfied will be directed to the Executive Director and will also be given the option of submitting a formal written complaint to the Executive Director
- The Executive Director within a reasonable time frame will arrange a meeting with the complainant to discuss their concern and reach a resolution. A formal written response to the complaint will be provided within a negotiated time frame.
- A complainant who remains dissatisfied will be informed that he/she may appeal in writing to the Chair of the Board of Director's or her designate and will be advised in writing of the disposition of the appeal. The Board Chair will arrange to meet with the complainant within a reasonable time frame to discuss their concern and reach a resolution.
- A complainant who is still dissatisfied will be informed that he/she may notify Imagine Canada in writing.