

## Comox Valley Child Development Association Fundraising Policy

DRAFT – January 2020

Comox Valley Child Development Association (CVCDA) is a nonprofit organization with the mission to “support participants through family centred, specialized services that build strength and capacity.”

The CVCDA Fundraising Policy ~~will align~~aligns with the “Association of Fundraising Professionals, Code of Ethics and Principals.”

All donations solicited and accepted on behalf of the organization shall be used to further this mission and follow the policies and procedures outlined below. The Fundraising Policy directs CVCDA in the decisions of the organization’s fundraising activities including the acceptance or refusal of donations.

All donations solicited and accepted on behalf of CVCDA shall be used to further the mission, strategy and objectives of the organization and follow the policies and procedures outlined in the policy.

### General Policy

- Funds shall be solicited in a respectful manner and without pressure.
- All third parties not directly affiliated with CVCDA who wish to solicit funds on behalf of the organization must acquire written permission from the CVCDA Executive Director prior to beginning any fundraising activities.
- Donor designated restrictions on contributions shall be honored.
- CVCDA is a registered charity and contributions made to the organization are tax deductible. Written tax receipts shall be issued for all donations.
- CVCDA reserves the right to refuse any proposed gift which is determined to be not in the best interest of the organization as outlined in the Gift Policy.

### Donor Policy

CVCDA will follow the universally accepted principles for donor rights established by Association of Fundraising Professionals (AFP), the Association for Healthcare Philanthropy (AHP), the Council for Advancement and Support of Education (CASE), and the Giving Institute: Leading Consultants to Non-Profits.

The Donor Bill of Rights can be found at: <https://afpglobal.org/donor-bill-rights>

### Donor Acknowledgements

- Every donor to CVCDA shall receive a donation receipt.
- Donations of \$100 or more will also receive a formal acknowledgement/ thank you letter from the Executive Director or their designate.
- Every donor will be included in informational mailings and receive invitations to special events.

### Donor Privacy

- Any information supplied to CVCDA by donors will be used solely to fulfill their donation and shall not be shared for any reason unless permission is granted by the donor to share such information.
- All requests to remain anonymous shall be honored.
- CVCDA does not sell or share donor lists.
- Donors who supply CVCDA with their postal address or email address may be contacted periodically for solicitation purposes and/or with information regarding upcoming events.
- Donor requests for removal of contact information shall be honored.

### Gift Policy

Whereas CVCDA actively solicits gifts and grants to further the mission of the organization, and Whereas there is the potential for controversy if certain gifts are accepted, the organization has adopted the following Gift Acceptance Policy: When considering whether to solicit or accept gifts, the organization will consider the following factors:

- Values - whether the acceptance of the gift compromises any of the core values of CVCDA.
- Compatibility - whether there is compatibility between the intent of the donor and the organization's use of the gift.
- Public Relationships - whether acceptance of the gift damage the reputation of CVCDA.
- Primary Benefit - whether the primary benefit is to CVCDA versus the donor.
- Consistency – whether the acceptance of the gift is consistent with prior practice.
- Form of Gift – whether the gift offered in a form that CVCDA can use without incurring substantial expense or difficulty.
- Effect on Future Giving - whether the gift encourage or discourage future gifts.

### Gift Acceptance

The CVCDA accepts the following types of contributions:

- **Cash.** The organization accepts cash gifts in any amount and are generally accepted without review.
- **Publicly-Traded Securities.** CVCDA may accept gifts of publicly-traded stocks and bonds at fair market values. Gifts of publicly-traded securities will generally be sold as soon as possible.
- **Life Insurance Policies.** CVCDA may accept gifts of life insurance policies where CVCDA is named as both beneficiary and irrevocable owner of the insurance policy. The donor must agree to pay, before due, any future premium payments owing on the policy.
- **Goods.** Goods are accepted gifts provided that have a monetary value and can be sold either at Auction or the discretion of CVCDA.
- **Property.** ~~(+) such~~ CVCDA will accept property when:
  - o The property is saleable.

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- The title/providence of the property is clear.
- The donor agrees that the property can be sold at CVCDA discretion.
- The donor is responsible for obtaining a qualified appraisal prior to completing the gift.
- CVCDA is aware of any carrying costs related to the property.
- **Services.** Services in-kind may be donated for resale by Auction. No tax receipts are issued donation of services.

### **Gift Refusal**

All decisions to solicit and/or accept potentially controversial gifts will be made by the Board of Directors in consultation with the Executive Director. The primary consideration will be the impact of the gift on the organization.

Whereby a gift may come under scrutiny the following guidelines will apply:

- The Executive Director will notify the Board of Directors when there are concerns the donation:
  - does not further the mission, strategy or objectives of CVCDA.
  - may potentially damage the reputation of the organization.
  - places the organization in jeopardy with funders.
  - compromises the charitable status of the organization.
- Whereby the Executive Director has notified the Board of Directors of a donation that could potentially raise questions, the Executive Director will present the case, any evidence and share the key decision points and procedure that was followed in that particular case in order for the Board of Directors to make a recommendation of acceptance or refusal.
- Whereby the Executive Director will ensure that the Board of Directors are informed regarding any donation that he/she judges could potentially raise questions to why CVCDA rejected it or accepted it.

### **Use of Legal Counsel**

CVCDA will seek the advice of legal counsel in matters relating to acceptance of gifts when appropriate. Review by counsel is recommended for:

- Gifts of securities that are subject to restrictions or buy-sell agreements.
- Documents naming CVCDA as trustee or requiring CVCDA to act in any fiduciary capacity.
- Gifts requiring CVCDA to assume financial or other obligations.
- Transactions with potential conflicts of interest.
- Gifts of property which may be subject to environmental or other regulatory restrictions.

### **Third Party Event Policy**

#### **Third Party events**

The CVCDA is happy to support third party events to raise funds for our organization. We support these events by:

- Providing our society's name/logo. Note: Use of logo must be approved by Communications staff before printing or publishing event materials.
- Provide CVCDA promotional materials (e.g. brochures, banners, donation boxes, etc.)
- Issuing tax receipts for donations according to Canada Revenue Agency rules and regulations where applicable. Please note that to issue a receipt we require donor information including: donor's full name, mailing address, and method of payment.
- When possible, providing event day volunteers.
- Publicizing event on CVCDA social media (Facebook, Twitter) and website.

Third Party event policies:

- The event organizer is responsible for 100% of the costs incurred for producing a community fundraising event. The CVCDA is unable to compensate any costs incurred for goods or services purchased for the event. This includes cost of advertising, venue, food, prizes, etc.
- The CVCDA does not solicit or provide event prizes such as auction items on the community fundraiser's behalf.
- The CVCDA does not provide access to our donor, staff and volunteer lists.