

Britannia Community Services Centre Society Fundraising Policy Statement

DRAFT – January 11, 2010

Revision – April 20, 2010

Revision – September 1, 2010

Revision – March 2011

APPROVED – APRIL 2011

BCSCS staff, board and volunteers will strive to ensure that sponsorship and fund development activities/opportunities are collaborative and consistent with BCSCS mission, values, and objectives. This policy is intended to help protect the integrity of the organization and its stakeholders by outlining ethical standards, transparency and accountability in relation to funds or other valuable contributions solicited or received through sponsorship and/or fund development.

The Executive Director has the authority to negotiate sponsorship and fund development opportunities on behalf of BCSCS, under the direction of the Board of Management. The Executive Director may designate members of staff to judge that criteria of specific sponsorship and/or fund development opportunities fall within the intent of this policy.

Please refer to the Fund Development guidelines for any procedures related to this policy.

Sponsorship and Fund Development activities are defined, but not limited to the following:

1. Special Events: fund development events that are conducted by, and benefit, BCSCS.
2. Third Party Events: fund development events that are negotiated by designated staff for the benefit of BCSCS but are planned, produced and/or conducted by other individuals or organizations.
3. Annual Fund Raising: solicitations for funds through direct mail and/or telephone campaigns.
4. Planned Giving: deferred donations, such as bequests, life insurance policies, and charitable remainder trusts.
5. Foundations: grants received upon application to the Britannia charitable foundation.
6. Corporate Support: includes corporate sponsorship of BCSCS events as well as corporate giving to BCSCS.
7. Sponsorship: includes sponsorship of BCSCS Special Events and direct sponsorship of BCSCS programs and services.
8. Individual Giving: personal solicitation of donations from individuals.
9. Product donations: donation of good and services towards BCSCS programs and events.

BCSCS does not endorse, through acceptance of a sponsorship or fund development opportunity, the product, service or philosophy of the sponsor or donor. In addition, a

sponsor or donor may not determine or influence the content of any program or service which BCSCS delivers.

This policy applies to all board members, staff, volunteers, and consultants who may solicit and receive sponsorship and fund development activities/opportunities on behalf of BCSCS.

Policy Guidelines

1. Approval of Sponsorship and Fund Development Activities

Sponsorship or fund development activity/opportunity must meet the intent and principles of this policy. If the sponsorship or fund development activity/opportunity is consistent with this policy but could still be reasonably perceived by the public, and/or BCSCS staff, members, clients or volunteers as potentially damaging to BCSCS's credibility or reputation, the Executive Director will review the sponsorship or fund development activity/opportunity to determine whether it is acceptable within this policy. Sponsorship or fund development opportunity will be discussed and approved by the Executive Director or designated staff member according to the Fund Development Guidelines and Procedures.

2. Rules of Conduct

Volunteers, board members, staff and consultants who solicit and receive sponsorship and fund development activities/opportunities on behalf of BCSCS must:

- I. have no vested interest that could result in personal gain;
- II. disclose immediately to BCSCS any actual or apparent conflict of interest;
- III. act with fairness, integrity, openness, and in accordance with all applicable legislation;
- IV. discourage the reality or perception of conflict of interest between BCSCS and sources of any sponsorship or fund development resources, to the greatest extent possible.
- V. avoid potential situations which might create undue or biased influence of any sponsor or donor over the programs, policy positions or resources of BCSCS.

3. Grants and Proposals

BCSCS may apply for grants and contracts from corporations, foundations, governmental agencies, and other sources provided they support programs or activities the Board of Management deems to be consistent with BCSCS mission and guiding principles. Grants and contracts shall not abridge the authority, control, or accountability of the BCSCS Board of Management, and shall not promise to fulfill monitoring and reporting requirements that are not within BCSCS capacity. Grants should not be unduly burdensome, unless such system enhancements are funded by the grant or contract itself.

4. Solicitations

Solicitation and other contacts with donors and prospective donors will be carried out by board members, staff members, and volunteers consistent with the Fund Development Guidelines and Procedures. Solicitations must ensure that;

- BCSCS will not engage any fund raising entities or individuals, commercial or otherwise, whose practices and activities are not under BCSCS direct control and supervision.
- BCSCS will not compensate staff members or any other solicitors or fund raising entities on the basis of a percentage of the funds raised. BCSCS will pay no finders fees for referrals of donors or potential donors.
- BCSCS will not engage in or condone intimidating, coercive, disrespectful, guilt-inducing, or high pressure tactics in its fund raising efforts. BCSCS will not send solicitors or others to donor's homes to pick up contributions committed by oral or written pledge.
- BCSCS will make no misleading, exaggerated, or undocumented claims regarding its achievements, nor unrealistic promises of future outcomes.
- BCSCS will not use photographs, quotations, or narratives that could identify the subject of the narrative, without the written consent of the individual(s) involved. If any of the subjects involved are minors, the written consent of both the minor(s) and the parents or legal guardians shall be obtained in advance of publication of such photographs, quotations, or narratives.

5. *Designated (Restricted) Donations – donations with attached terms*

BCSCS accepts designated donations for the purposes consistent with its mission, values and strategic plan and all designated donations are to be used for the purposes for which they are given unless negotiated.

6. *Stewardship of Donations*

All donors are entitled to receive a charitable donation tax receipt in accordance with current taxation law and the Canada Revenue Agency guidelines and any information from or about donors that is obtained by, or on behalf of BCSCS is to be kept confidential to the extent allowed by law. Donors have the right to remain anonymous in accordance with provincial and federal privacy and freedom of information laws.

7. *Legacies*

Legacy fundraising is an area that requires great sensitivity and professionalism. Donors will often be leaving their largest-ever gift - sometimes their life savings. Legacy donations are usually the result of time invested by fundraisers in building the confidence and trust of donors. Donors and prospective donors must not be subjected to coercion or undue pressure. Donors are to be encouraged to seek independent advice concerning any proposed donation that might significantly affect the donor's financial position, taxable income, or relationship with other family members.

8. *Naming*

Britannia will continue the practice of naming building and other assets to honour the distinguished contributions of individuals or organizations to the Grandview Woodlands and Britannia community. Naming of buildings, scholarships, awards, events or other important initiatives will be consistent with BCSCS mission, values, and objectives and do not mean endorsement of a partisan political or ideological position or of a commercial product associated with that name. All named recognitions are to be reviewed periodically, Britannia reserves the right to remove or rename assets as required.

9. Relationship with Other Agencies

All representatives for fund development events which are conducted jointly by BCSCS and one or more other charitable organizations must sign a third party agreement.

10. Lists

BCSCS maintains several mailing lists which are used to disseminate a wide variety of information to a broad constituency. It is understood that names and addresses are given to BCSCS for a number of different reasons and that this information is bound by BCSCS's confidentiality and privacy policies as well as Federal and Provincial privacy and Freedom of Information laws.

These lists include:

- BCSCS membership
- Information requests from the Web
- Workshop participants
- Subscribers
- Donor

BCSCS's lists are for internal purposes only and BCSCS will not share, trade, rent or lend any list.

11. Accepting Benefits from Donors or Sponsors

From time to time BCSCS Board or Staff members will be invited to attend events where the cost is paid by a donor or sponsor. In such cases, transparency is crucial and approval will be sought and authorization provided in writing according to the Fund Development Guidelines and Procedures

12. Tax Receipts

All donations must be receipted following the Britannia Fund Development Guidelines and Procedures and must be in accordance with Revenue Canada guidelines. Final interpretation of Revenue Canada guidelines for charitable tax receipts rests with BCSCS auditors.