

## ***III-5 Fundraising policy***

### **A. Purpose of policy**

To define how Focus on the Family (Canada) is committed to ethical fundraising and financial accountability to its stakeholders.

### **B. Donors' rights**

All donors to Focus on the Family (Canada) Association, which are not themselves registered charities or foundations, are entitled to receive an official receipt for income tax purposes for the amount of eligible donations made in cash or for the fair market value of the property contributed. The governing board or management may establish a minimum amount for the automatic issuance of official receipts, in which case these smaller donations will not be receipted unless the annual cumulative total of those donations exceeds this minimum and the donor requests an official receipt.

All fundraising solicitations by or on behalf of our organization will disclose our full legal name.

Printed solicitations (however transmitted) will also include our address or other contact information.

Donors and prospective donors are entitled to receive the following information, promptly upon request:

- our most recent audited financial statements as approved by the governing board;
- our charity registration number (BN) as assigned by Canada Revenue Agency;
- any information contained in the public portion of our most recent Charity Information Return (Form T3010);
- a copy of our Investment Policy relating to investable assets, if applicable;
- a list of the names of the directors of the governing board; and
- a copy of this Fundraising policy.

Donors and prospective donors are entitled to know, upon request, whether an individual soliciting funds on our behalf is a volunteer, an employee or a fundraising consultant.

Donors will be encouraged to seek independent advice if we have any reason to believe a proposed gift might significantly affect the donor's financial position or relationship with other family members.

The privacy of donors will be respected, including their right to remain anonymous, unless information must be released by law. Donors have the right to receive a copy of their own donation history, and to challenge its accuracy.

Any donor records that are maintained by our organization will be kept confidential to the greatest extent possible.

Our donor list will not be exchanged, sold or rented.

Donors and prospective donors will be treated with respect. Every effort will be made to honour their request to:

- limit the frequency of solicitations;
- not be solicited by telephone or other electronic technology; and
- not receive printed material in regards to our fundraising appeals.

The organization will respond promptly to a complaint by a donor about any matter that is addressed in this *policy*.

### **C. Fundraising practices**

Fundraising solicitations will:

- truthfully describe our projects or programs for which the contributions will be used; and
- respect the dignity and privacy of those who benefit from our activities in pursuit of our objects.

Volunteers, employees and hired fundraisers who solicit or receive funds on our behalf shall:

- adhere to the provisions of this policy;
- act with fairness, integrity and in accordance with all applicable laws;
- adhere to the provisions of the applicable professional codes of ethics, standards of practice, etc.
- cease solicitation of a prospective donor who identifies the solicitation as harassment or undue pressure, or who states that he/she does not want to be solicited;
- disclose immediately to the organization any actual or apparent conflict of interest; and
- not knowingly accept donations for purposes that are inconsistent with the charity's objects or mission.

Paid fundraisers, whether staff or consultants, will be compensated by a salary, or fee, and will not be paid finders' fees, or commissions based on either the number of contributions received or the value of funds raised. Compensation policies for fundraisers will be consistent with our policies and practices that apply to all our personnel.

If an external fundraiser is retained, access to our donor list will be limited and will be kept under strict control.

The governing board will have access to information recorded about complaints received from donors or prospective donors about matters that are addressed in this *policy*.

Every reasonable effort will be taken to ensure our donors are kept informed about our organization and its ministries.

### **D. Financial Accountability and Organizational Integrity**

The charity's financial affairs will be conducted in a responsible manner, consistent with the ethical obligations of stewardship and all applicable law.

All donations shall be used to support the charity's objects, as registered with CRA.

A restricted or designated donation in support of a program or a single project which is approved by the board will be used for the purpose for which it was given. To avoid being legally precluded from using designated funds at all if a project is oversubscribed or is terminated, the following policy is in place and is published.

*“Spending of funds is confined to approved programs and projects. Each restricted contribution designated towards an approved program or project will be used as designated with the understanding that when the need for such a program or project has been met, or cannot be completed for any reason the remaining restricted contributions designated for such program or project will be used where needed most.”*

If the charity’s investable assets surpass \$1,000,000, the funds will be invested according to our Investment Policy.

Financial statements will be prepared and audited annually to ensure they are in compliance with Generally Accepted Accounting Principles and Standards as established by Chartered Professional Accountants Canada.

The governing board shall be comprised of responsible individuals,

- the majority of whom are Canadian residents;
- who are not employees of the organization, or otherwise receive compensation from the organization except as authorized by law;

The governing board shall:

- hold at least three full-agenda meetings each year;
- create policy for the organization;
- maintain effective control over the organization;
- establish a proper financial reporting system which permits the production of annual operating statements and a balance sheet, showing reasonable detailed information that:
  - is factual and accurate in all material respects;
  - identifies government grants and contributions separately from other contributions; and
  - ensure that the organization at all times operates within the limits of, and in accordance with, the objects in its governing documents;
- take seriously its responsibility to be conversant with and comply with federal, provincial and municipal laws and regulations;
- ensure that the organization is open and accurate in all its dealings;
- not permit any officer, member of the governing board, or staff member of the organization to receive royalties for the use of any property of such person that is used for fundraising or promotional purposes by the organization;
- ensure that all government prescribed returns such as the Registered Charity Information Return (T3010) and voluntarily produced reports will be prepared factually, accurately and on a timely basis;
- ensure that sufficient funds will be spent on administration and fundraising (where appropriate) to assure effective and efficient management of our resources