



**THE UNITED CHURCH OF
CANADA FOUNDATION / FONDATION DE L'ÉGLISE
UNIE DU CANADA**

FUNDRAISING POLICY

Approved by the Board of Directors Dated the 5th day of December 2017



**Fundraising Policy
for
The United Church of Canada Foundation / Fondation de L'Église Unie
du Canada**

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The Foundation informs, serves and otherwise assists donors who wish to support the charitable purposes of The United Church of Canada (“the Church”) and at times and when applicable, other registered charities, but never pressures or unduly persuades. Staff and Board members acting on behalf of the Foundation will conduct themselves in accordance with accepted standards of accuracy, truth, and integrity.

In all matters involving the donor, the interest and well-being of the donor must take precedence. In cases of potential or actual conflict of interest, those acting on behalf of the Foundation must declare the conflict and require someone else to act on behalf of the Foundation.

Persons acting on behalf of the Foundation shall in all cases encourage the donor to discuss the proposed gift with independent legal and/or tax advisors of the donor’s choice and at the donor’s expense, to ensure that the donor receives a full and accurate explanation of all aspects of the proposed charitable gift. In some cases, the Foundation may decline a gift if the donor has not obtained independent advice.

A. Treatment of Donors

The organization honours donors’ and prospective donors’ requests to:

- change the frequency of contact;
- not be contacted by telephone or other technology;
- receive printed material concerning the organization including financial statements;
- discontinue contact; and
- remain anonymous to anyone other than staff whose roles require them to access personal information relating to a gift or gifts to ensure the gift is handled as per the donors wishes and an accurate tax receipt is issued.

Any complaints will be responded to quickly and diligently. The Foundation’s board will receive notice at least once annually of any complaints and their resolution.

B. Fundraising Practices

All fundraising activities conducted by or on behalf of the organization must:

- be truthful,
- accurately describe the organization’s activities,
- disclose the organization’s name,
- disclose the purpose for which funds are requested,

- disclose the organization's policy with respect to issuing Official Income Tax receipts including any policy on minimum amounts for which a receipt will be issued,
- disclose whether the individual or entity seeking donations is a volunteer, employee or contracted third party,
- be consistent with the Foundation's objects and mission;
- safeguard confidential information; and
- comply with all relevant legislation (e.g. CASL).

The Foundation does not rent its donor list to, nor exchange its donor list with, any organization other than The United Church of Canada. Donors may request that their names and contact information not be shared.

B.1 Independent Advice

The Foundation will encourage donors to seek independent advice if the proposed gift is a planned gift and/or the Foundation has any reason to believe that the proposed gift might significantly affect the donor's financial position, taxable income, or relationship with other family members.

B.2 Donor Recognition

Donors may be recognized publicly for their gifts unless they have indicated their wish to be anonymous.

Recognition mechanisms created due to a gift shall not be arbitrarily changed or withdrawn. Unless otherwise negotiated at the time of the gift or changed through a joint agreement between the Foundation and the donor or the donor's family or legal representative, the original form of the recognition mechanism will be maintained. If the mechanism cannot be physically retained, it will be changed to another consistent with the original agreement. If continuation of the recognition creates a reputational risk for the Foundation, it may be terminated or altered.

B.3 Promotional Material

The Foundation will not make claims that cannot be upheld. It will refrain from using marketing materials or making representations that could be misleading. The Foundation will not exploit its beneficiaries. It will be sensitive in describing those it serves (whether using graphics, images or text) and fairly represent their needs and how these needs will be addressed.

B.4 Conflicts of Interest

Anyone conducting fundraising activities on the Foundation's behalf must immediately declare any actual or apparent conflicts of interest.

C. Payment of Fundraisers

The Foundation hires – permanently or on a contract basis – all individuals who will undertake fundraising on the Foundation’s behalf.

From time to time volunteers may take part in fundraising activities. On these occasions volunteers will be reimbursed for expenses they incur carrying out this work but they will not be reimbursed for time spent or in any way receive financial benefit from a gift that they were involved in soliciting.

To be clear, the Foundation does not, directly or indirectly, pay finder’s fees, commissions or percentage compensation based on contributions.

From time to time the Foundation may provide a congregation with a reimbursement at The United Church of Canada’s Pulpit Supply rate in place at the time, if a Foundation volunteer is an ordered or lay worship leader and the volunteer’s absence from the congregation during worship was required for the volunteer to carry out their work for the Foundation. The staff and Treasurer of the Foundation will assess the need for this reimbursement on a case-by-case basis.

D. Review and Amendment of Fundraising Practices Policy

Every three years the Governance and Nominations Committee will review this policy.