

FUNDRAISING AND GIFT ACCEPTANCE POLICY

PURPOSE

To provide clear, transparent and accountable guidelines for fundraising and the acceptance of gifts in a way that is consistent with PWRDF's vision, mission and values.

APPLICATION

This policy applies to all directors, members, employees, agents and donors of PWRDF.

POLICY

PWRDF will

- respect the dignity of those who benefit from the activities of the PWRDF
- be truthful and accurately describe the activities of the PWRDF and the intended use of donated funds
- adhere to the provisions of applicable professional codes of ethics and standards of practice

With respect to donors, PWRDF will

- acknowledge all gifts in an appropriate manner
- recognize the value of and relationship with donors
- not sell its donor list
- not make available donors' names and mailing addresses except by consent of the respective donors and then only to ministries of the Anglican Church of Canada
- when soliciting major donors, keep the interests of the prospective donor as the primary consideration and encourage prospective donors to seek independent legal and financial/tax counsel if the proposed gift is a Planned Gift and/or might significantly affect the donor's financial position, taxable income, or relationship with family members
- honour the donor's preferred mode and frequency of contact
- respect the wish of the donor and prospective donor regarding recognition of the gift, including requests to remain anonymous
- cease solicitation at the donor and prospective donors request

With respect to donations, PWRDF will

- only accept donations for purposes that are consistent with its mission
- reserve the right to decline a gift
- work within the context of tax, trust and other regulatory requirements
- seek legal advice on acceptance of gifts-in-kind, unusual gifts, gifts with major conditions attached, gifts of real property, personal property, gifts of securities that are subject to restrictions or buy-sell agreements, gifts requiring PWRDF to assume financial or other obligations
- ensure that PWRDF is not exposed to uncertain and possibly significant liability and/or protracted litigation, by accepting or declining the gift
- issue tax receipts that conform to rules and regulations set out by Canada Revenue Agency
- disclose, on request, whether the individual seeking donations is a volunteer or an employee
- not, directly or indirectly, pay a finder's fee, commissions or percentage compensation based on donations
- honour restrictions on use of gift

AMENDMENT

This policy may be amended by the PWRDF Board.

Approval Date: May 2013

Review Date: March 2018

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