



FUNDRAISING POLICY

1 PURPOSE

The purpose of this policy is to set out provisions that govern all fundraising campaigns, programs, and events carried out in support of George Brown College or by third parties in support of charitable purposes that are aligned with the College's vision and values.

2 SCOPE

Adhere to both the Not-for-Profit Corporations Act, 2010 - www.ontario.ca/page/guide-not-profit-corporations-act-2010 and the "Policies" guidance of the Canadian Revenue Agency – www.cra-arc.gc.ca/chrts-gvng/chrts/plcy/menu-eng.html. The George Brown College Foundation Board of Directors approves the **FUNDRAISING POLICY**. In order to ensure that this policy remains effective, the President of the Foundation will ensure that it is reviewed once every three years and recommend any required changes.

3 DEFINITIONS

For the purposes of this policy:

Prospect refers to any individual, corporation, foundation, service clubs, etc., identified as a potential donor to the College.

Major gift refers to a cash donation or other gift to the Foundation valued at \$10,000 or more. The amount can be revised at any time by the Foundation Board.

Third-party fundraising refers to fundraising initiated and conducted in support of the College or other charitable organizations by individuals or groups other than the College or the Foundation.

4 POLICY

The George Brown College Foundation engages in fundraising activities to sustain and further its vision and mandate, and welcomes and facilitates the activities of third parties in raising fund that support its mission and are in keeping with its values. The Foundation has the primary responsibility to manage and support the identification, cultivation, solicitation, recognition, and stewardship of all College private funding sources, through a de-centralized, but well-coordinated process. The Foundation will ensure the

coordination of all third-party fundraising. The Foundation will be guided in established procedures by the **FUNDRAISING POLICY**.

4.1 Fundraising by College Staff and Faculty

To facilitate the effective management of College fundraising and to ensure accountability to potential donors, all donor contacts initiated by College staff or faculty, or by a Division, must be communicated to the Foundation. Complete information about any donations received by the College must be forwarded to the Foundation as soon as possible to ensure timely and appropriate stewardship with donor.

4.1.1 Establishment of Fundraising Priorities

Every three years, the Board of Governors of the College will assess the fundraising needs of the College in achieving its mission and strategic direction. The Board of Governors will review these needs annually and provide the Foundation with a list of the College's fundraising priorities early in the calendar year, prior to the Foundation budget-setting process.

4.1.2 Approval of Foundation Fundraising Programs

The Foundation will be guided by the College's fundraising priorities in developing its annual program, objectives, and targets, in assessing the desirability and feasibility of specific opportunities, and in monitoring progress. In the first quarter of the year, the Foundation will propose its recommended fundraising program and associated campaigns and activities to the College President for approval.

4.1.3 United Way Annual Campaign

George Brown College recognizes the United Way as the major umbrella organization for charitable agencies in the City of Toronto. The College has a historic partnership with the United Way and encourages active involvement by students, faculty, and staff in the United Way annual fundraising campaign, offering corporate support to assist the campaign.

While the College does not exclude other charitable organizations from using College facilities where the involvement of the College community has value to students, faculty, or staff, fundraising priority will be given to the United Way.

4.1.4 Coordination

All College fundraising will be coordinated through the Foundation to ensure clear and open communications with all parties resulting in respect for the donors or potential donors. For this reason, the Foundation has the authority and responsibility to determine the number, sequencing, and timing of fundraising activities, when necessary.

4.1.5 Prospect Clearance

Fundraising activities at George Brown College are to be conducted in a coordinated manner. Any member of the College community wishing to solicit a major gift (\$10,000 or more) to the College must receive prospect clearance from the Foundation before approaching the potential donor, in accordance with related Foundation operations. This will ensure that all Academic Divisions have access to central fundraising expertise and resources, that all fundraising efforts are carefully coordinated, and that all contacts with prospective donors are planned and undertaken in a manner that maximizes donor affinity with, and support of, the College.

4.1.6 Memorial or Recognition Fundraising

On the death, retirement, or departure of a member of the College community, colleagues and friends may wish to initiate a fund in order to establish a scholarship, award, or other suitable acknowledgement or memorial, through personal voluntary contributions. George Brown College authorizes the President of the Foundation, in consultation with the College President, to approve any such proposals for memorial funds and the solicitation of donations thereto in the name of the College.

4.1.7 Ethical Fundraising

All fundraising activities will be expected to conform to the mandate, values, and ethical standards of the College and the Codes of Ethics of the Association of Fundraising Professionals (AFP). The Codes of Ethics are to be reviewed once every three years by the Foundation Board of Directors

-<https://www.afpnet.org/files/contentdocuments/codeofethics.pdf>

4.2 Third-party Fundraising

Third-party fundraising refers to fundraising initiated and conducted in support of the College or other charitable organizations (e.g. United Way) by individuals or groups other than the College or Foundation.

Third-party events are not run by the College or the Foundation staff; however, limited support may be approved by the Foundation President if deemed appropriate.

4.2.1 Third-Party Event Requirements

Third Party events are required to:

- Be consistent with the mission and values of the College and Foundation
- Maintain a positive presentation and give the College positive exposure and increased public awareness
- Provide an overall financial net gain to operations or programs

- Provide positive marketing/public relations exposure
- Meet staff and volunteer resource requirements

4.2.2 Third-Party Fundraising Approval

The Foundation may approve a third-party fundraising program, campaign, or event based on the following:

- Compatibility of the third-party event with the mission, priorities, and values of College and the Foundation
- Anticipated profitability of the third-party event
- Positive marketing/public relations exposure for the College
- The number and timing of other concurrent fundraising initiatives

4.2.3 Relinquishment of Support

The Foundation reserves the right to:

- Refuse involvement, and the use of its name and logo, in any event that does not meet with its expressed approval
- Relinquish support of any third party event that does not abide by the policies, criteria, and guidelines set out in this agreement, without any liability or obligation

4.2.4 Third-Party Fundraising Limitations

The Foundation does not permit the following types of fundraising in a third party context:

- Events that encourage/involve behaviour that is counter to the College's mission and/or programmatic activities
- Events involving the promotion or support of a political party or candidate, or those which appear to endorse a political activity

4.2.5 Priority for Fundraising Request

Priority will be given to fundraising requests or proposals from campus organizations, students, faculty and staff that are proposing to raise funds to support an appropriate College program or organization, including their own.

4.2.6 Guidelines

For approved third party events/promotions, the Third-Party Event Organizer(s) and Foundation are required to adhere to the following guidelines:

4.2.6.1 Brand Standards

- It is important for the College to uphold brand integrity and consistency in dealing with the public
- The use of the College and Foundation name is permitted only with the Foundation's and College's approval

4.2.6.2 Promotional Materials

- The Foundation will have final, signed approval on ALL promotional materials. (brochures, flyers, advertisements, public and media communications)
- The Foundation must review and approve all promotional materials (including, but not limited to, letters, brochures, press releases, flyers, and advertising) prior to distribution
- All promotional materials must clearly state the percentage of proceeds or portion of ticket price that will be donated to Foundation

4.2.6.3 Donations and Sponsorships

Applicants will provide a list of sponsors who will be asked for support, including a description of their donation and/or sponsorship, plus its retail value as well as contact information. This information will allow the Foundation to better recognize partners within the community.

- The Foundation will have the final approval of the solicitation of all sponsors
- The Foundation will not solicit sponsors on behalf of Third Party Event Organizer(s), nor will they provide contacts for sponsorships.

4.2.6.4 Gaming (Including Raffles, 50/50 Sales and Licenses)

Third party events involving licenses and fees will conform to government regulations; (federal, provincial and municipal) including requirements by the licensing body on the distribution and use of funds. It is the sole responsibility of the Third Party Event Organizer(s) to fill out and submit all such applications. A minimum of five business days must be given to the Foundation to review such licenses. Third Party Event Organizer(s) will pay the fees for said licenses and are responsible for filing post event forms/reports.

4.2.6.5 Staffing and Volunteers

The Third Party Event Organizer(s) will provide all staffing and recruitment of volunteers for said event. Upon request, the Foundation will provide a letter to volunteers recognizing them for their volunteer hours.

4.2.6.6 Financing and Insurance

Only the final net proceeds will be processed by the Foundation. Under no circumstances will third party revenues and expenses flow through the Foundation.

The Foundation will not underwrite any third party event and will not cover any insurance requirements.

4.2.6.7 Accountability

Third Party Event Organizer(s) will:

- Keep a record of revenues and expenses for submission to the Foundation, if requested
- Provide periodic status reports to the Foundation on an agreed-upon basis
- Provide reasonable notice of any third party event cancellation
- Inform the Foundation if the third party event is to benefit other charity partners
- Be responsible for any financial losses or unsettled accounts.

Third Party Event Organizer(s) will not:

- Name the College in, or sign contracts on behalf of Third Party Event Organizer(s) without Foundation's written consent.

4.2.6.8 Gifts-In-Kind

The Foundation does not issue tax receipts for Gifts-In-Kind to third party events. Gifts-in-Kind are gifts of property, rather than cash and marketable securities. These include (but are not limited to) gifts of supplies, equipment, books and artwork. Gifts-In-Kind not eligible for tax receipts include a gift of professional/personal services from an individual, a gift by a company for its principal product or service, and donations of used clothes or furniture etc.

4.2.6.9 Online Assistance

The Foundation will provide technical support in creating a web page for the event, but the event organizers are expected to administer their own on-line event page (e.g. Post information, send email request, etc.)

4.2.6.10 General Accountability and Reporting

The Board of Directors of the Foundation will provide an annual summary report to the College's President, identifying successes achieved and emerging issues and challenges within the list of College-identified priority needs.

4.2.6.11 Promotion

Permission must be received in writing from the Foundation for the use of the College and/or Foundation's logo and name. Materials featuring the logo and name or the Foundation logo and name must be approved prior to printing.

Publicity must not imply that the event is sponsored or co-sponsored by the College or the Foundation, or that the College is involved in any way except as a beneficiary.

4.2.6.12 Accountability

The organizers of third party events are solely responsible for:

- All costs and liabilities associated with the event
- Any financial loss resulting from the event
- Any obligations or agreements entered into with other parties (No agreement may be entered into using the George Brown College name, without the written permission of the Foundation.)
- All required insurance, licenses, and fees
- All staffing requirements

4.2.6.13 Revenues

The organizer(s) of a third-party program or event are required to handle all associated monetary transactions, including ticket sales. Foundation representatives are not obligated to financially support or participate in the event.

4.2.6.14 Licenses

A third-party program or event must meet all insurance and licensing requirements and fees required by federal, provincial, and municipal regulations. The Foundation may request proof of such compliance before granting approval of the program or event.

A list of potential donors and sponsors with a targeted ask amount of \$1,000 or more must be sent to the Foundation for approval. Event organizers must receive clearance to approach such prospective donors or sponsors in order to minimize possible overlap with other College fundraising activities.

The Foundation will reserve the right to audit the financial records pertaining to any third-party fundraising program or event.

5 ACKNOWLEDGEMENT AND RECEIPTING

The Foundation may provide receipts for income tax purposes, for qualified gifts, through the on-line donation system. Donations submitted outside of the on-line donation system (e.g. cheques) of \$20 or more will receive a tax receipt.

The Foundation reserves the right to issue or not issue any receipts at its sole discretion, in accordance to Canadian Revenue Agency rules and regulations.

The Foundation adheres to all relevant privacy laws regarding donor information.

Charitable donation tax receipts will be issued by the Foundation provided the donor received no material benefit, in the form of services, products, or promotion. Charitable donation tax receipts will not be issued for:

- Purchase of tickets or entrance fees
- In-kind gifts
- Silent auction purchases
- Sponsorship; (The Foundation can provide event sponsors with a business receipt confirming the sponsorship amount, but cannot issue a charitable donation tax receipt for sponsorship.)
- Donation of services

6 ACCOUNTABILITY AND REPORTING

An annual summary report of fundraising activity will be prepared by the President of the Foundation for the Foundation’s Board of Directors and the College Board of Governors.

POLICY:	FUNDRAISING POLICY
APPROVING AUTHORITY:	GBCF BOARD OF DIRECTORS
EFFECTIVE DATE:	OCTOBER 12, 2017
MANDATED REVIEW:	OCTOBER 12, 2020