

## FUNDRAISING POLICY

- i. The Fundraising Committee may establish teams to undertake specific aspects of the fundraising program. The Multifaith Housing Initiative (MHI) will not undertake any activities which go against the values of the organization and will be respectful of the diversity of religions which participate in MHI.
- ii. A particular faith group may fundraise on behalf of MHI with their own community according to their own fundraising policies and in a manner acceptable to them.
- iii. Fundraising involves many facets including solicitation of donations, promoting and marketing the organization and establishing strategic partnerships with corporations, individuals, foundations and other organizations.
- iv. MHI honours donors' and prospective donors' requests to:
  - limit the frequency of contact;
  - not be contacted by telephone or other technology;
  - receive printed materials concerning the organization;
  - discontinue contact
- v. MHI does not sell, rent, or otherwise share its donor list.
- vi. Anyone seeking or receiving funds on behalf of MHI, whether a volunteer, employee or third party must:
  - act with fairness, integrity, and in accordance with all applicable laws;
  - cease contacting a prospective donor who states that he/she does not wish to be contacted;
  - disclose immediately to MHI any actual or apparent conflict of interests or loyalty, as per our Conflict of Interests Policy;
  - not accept donations for purposes that are inconsistent with the MHI mission.
- vii. Fundraising solicitations will be truthful and accurately describe MHI's purpose and programs, and will only make claims which we can fulfill. We will not use high pressure tactics to raise funds.
- viii. All fundraising activities conducted by or on behalf of MHI must:
  - be truthful,
  - accurately describe MHI's activities,
  - disclose the MHI 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, upon request, whether the individual or entity seeking donations is a volunteer, employee or third party.

- ix. Any fundraising materials distributed by or on behalf of MHI will include our address or other contact information.
- x. MHI does not exploit our beneficiaries. We are sensitive in describing those we serve (whether using graphics, images, or text), and will fairly represent their need and how these needs will be addressed.
- xi. MHI will ensure that donors receive informed, accurate and ethical advice about the value and tax implications of contributions whenever it is requested.
- xii. Donor's requests to remain anonymous will be honoured
- xiii. MHI encourages donors' to seek independent advice if the proposed gift is a Planned Gift and/or MHI has any reason to believe the proposed gift might significantly affect the donor's financial position, taxable income, or relationship with other family members.
- xiv. MHI will ensure that contributions are used in accordance with donors' intentions.
- xv. MHI will obtain consent from major donors before substantially altering the conditions of significant financial transactions.
- xvi. MHI will take care to ensure proper stewardship of all revenue sources.
- xvii. MHI will not pay finder's fees, commission or percentage compensation based on contributions to external fundraisers.

## **DONATIONS POLICY**

The MHI welcomes and encourages gifts from individuals, groups, foundations and corporations, for the purpose of enhancing the services that the MHI provides to its various stakeholder groups, primarily providing and promoting the development of affordable housing and services for the tenants who use them, in the city of Ottawa.

### **Definition**

For income tax purposes, a gift or donation is defined as a voluntary transfer of property to MHI made without the expectation that any benefit will accrue to the donor or anyone designated by the donor. The scope of this policy includes gifts of:

- Money
- Art and photographic works
- Equipment
- Other in-kind gifts
- Property of significant value, such as real estate or securities
- Planned gifts, such as willed donations, bequests or endowments

### **Donation Acceptance**

MHI shall analyze proposed gifts or donations, and shall accept those, which they feel will cost-effectively fit the mission and objectives of the organization.

MHI reserves the right to use the donation in the best interest of those in need of affordable housing, and shall make decisions regarding the investment, disposition and/or eventual disposal of all donations

Donations become the exclusive property of MHI and must be of a clear nature.

MHI may accept conditions on the disposition of donations where it deems the proposed conditions to be reasonable and feasible.

### **Donor Records**

MHI shall maintain donor records, the contents of which shall remain confidential unless the donor agrees otherwise.

### **Official tax receipts**

For monetary donations, which are in the amount of \$15 or more, official income receipts will be issued to donors for income tax purposes. We work towards issuing tax receipts within 60 days of donation unless the donation is a monthly gift in which case the receipt will be issued at year end.

For in-kind donations, official receipts will be issued provided that the appraised value of the donation exceeds \$25.

### **Donor Recognition**

MHI shall give formal acknowledgement or recognition to the donor, which is commensurate with the value of the donations.

Publicity about donations may also be considered, with the concurrence of MHI and the donor(s).