

'Operations-Fiscal Management-Fund Raising Policy' Board Policy (4.1.6)



Published Date:	June 2012
1 st Revision:	June 1, 2015
2 nd Revision:	May 4, 2017
3 rd Revision:	January 29, 2018

All fundraising activities carried out by WVC will be conducted in an ethical manner, consistent with the Code of Conduct, Core Values and Mission Statement of WVC, as well as the legal and regulatory requirements imposed by any governing body having jurisdiction over WVC. In addition, all fundraising activities will comply with the standards established by sector organizations of which WVC is a member.

All fundraising solicitations, by or on behalf of our organization, will disclose our full legal name, be truthful, and will accurately describe the intent and purposes for which funds are being requested and how they will be used. We will disclose, upon request, whether the individual or entity representing WVC seeking donations is a volunteer, employee or contracted third party.

WVC respects the wishes and privacy of all donors and prospective donors. Any and all donor information obtained as a result of our fundraising efforts will be maintained and stored in accordance with WVC Privacy, Security and/or Record Retention Policies. WVC donor lists are strictly controlled for its exclusive usage and are not sold, rented or exchanged. WVC does not publish donor names or donation amounts without the express permission of the donor. WVC honours requests to limit the frequency of contact, to not be contacted by telephone or other technology, to not receive printed material concerning the organization, and to discontinue contact.

Donors shall be entitled to receive an official tax receipt for all eligible donations made to WVC. In some cases, the value noted on the receipt will be the amount of the donation, less the fair market value of an incentive received by the donor. WVC may establish a minimum amount for the automatic issuance of official receipts, in which case smaller contributions will be receipted only upon request.

All funds which have been donated, and accepted by WVC, for specific purposes, including all restricted, designated, and endowment gifts, shall be separately accounted for in WVC's accounts and directed to expenditures which have been incurred specifically for that purpose. In cases where donations exceed what is needed or where local conditions prevent program implementation, World Vision Canada will redirect funds to where most needed to help people in need. WVC will not accept 'named' gifts.

WVC does not, directly or indirectly, pay finder's fees, commissions or percentage compensation based on contributions.

WVC encourages donors to seek independent expert advice if a proposed gift is a bequest, major gift and/or WVC has reason to believe it might significantly affect the donor's financial position, taxable income, or relationship with other family members.

Principles:

- To be a leader and advocate for ethical fundraising
- To comply with legal and regulatory requirements and the standards imposed by sector organizations of which WVC is a member
- To be open and transparent regarding all fundraising activities

Each respective position and management team has specific responsibilities for the enforcement and compliance of policy (4.1.6).

Board:

Will delegate to the Senior Leadership Team responsibility for complying with all aspects of this policy and reporting to the Board any violations in respect of this policy.

Senior Management:

Will be responsible for ensuring:

- Applicable policies and procedures are in place for ethical fundraising activities
- A Privacy Officer has been appointed who is responsible for overseeing all privacy related matters
- Ethical practices are implemented and followed by all employees, representatives and volunteers
- That a complaints policy and procedures are in place, and report to the board at least annually on this process

Privacy Officer:

Will be responsible for ensuring:

- The organization has a relevant and current operational Privacy Policy that is available to all employees, representatives, volunteers, and is published on the WVC website
- That any and all privacy violations or potential privacy violations are investigated and reported to the Senior Leadership Team in a timely manner.

