

Monetary Donations

Note: When TWC stated this refers to The Women's Centre Grey Bruce

Policy Statement

The Women's Centre Grey Bruce will receive donations via cash/cheques/money order/credit cards/e-transfers in accordance with the Income Tax Act. Cash/negotiable instruments are to be handled in a safe and secure manner to prevent possible loss. All monetary donations are to be recorded through the Agency accounting system and through the Agency fundraising CRM software (DonorPerfect).

Procedure

Official tax receipts will be issued upon receipt of funds.

Fundraising

Note: When TWC stated this refers to The Women's Centre Grey Bruce

Policy Statement

As defined by the CRA, a gift is a voluntary transfer of property without valuable consideration to the donor. TWC accepts gifts in support of its mission and strategic priorities. TWC will accept gifts that are consistent with its mission and values, and that are in compliance with CRA guidelines.

TWC makes all decisions regarding the acceptance or rejection of a donation and may direct the gift to the area of greatest need. TWC may decline a gift as a result of restrictions proposed by the donor.

Procedure

TWC is a registered charity and therefore a trustee of charitable dollars. This policy recognizes the critical importance of ethical conduct in fundraising activities in order to:

- safeguard the status of the organization as a registered charity;
- ensure TWC stands up to scrutiny by all its stakeholders and the public;
- ensure that TWC maintains high standards of integrity and stewardship in both its active fundraising and related communication activities and its acceptance of donations.

TWC will not accept gifts that are not recognized by CRA guidelines or that violate federal, provincial, or municipal laws.

TWC will not accept gifts or enter into partnerships that compromise its commitment to its mission and values.

No gift will be accepted that may improperly benefit any individual or organization or jeopardize the tax-exempt status of TWC (as defined by CRA guidelines).

Depending on the nature of the gift, a donor may be asked to obtain an independent appraisal of the value of the gift with responsibility for any fees resting with the donor.

TWC reserves the right to accept or decline any gift. The final decision to accept or decline a gift rests with the Executive Director and/or Board of Directors.

All donations in support of TWC will be accepted and processed through the fundraising department for acknowledgement, receipting, recognition, and stewardship purposes.

When gifts with restrictions are accepted, restrictions will be honoured with the understanding that when the financial need for a program has been met or the program cannot be completed, and donor/estate representative are not living or able to consent to an amendment, the remaining restricted gift will be applied toward TWC-identified areas of greatest need.

TWC will provide donors with official tax receipts for income tax purposes for gifts in compliance with the requirements of the Canada Revenue Agency (CRA).

Donors

Note: When TWC stated this refers to The Women's Centre Grey Bruce

Policy Statement

The Women's Centre Grey Bruce will adhere to the Donor Bill of Rights and eDonor Bill of Rights documentation.

Procedure

All donors have these rights:

- To be informed of the organization's mission, of the way the organization intends to use donated resources, and its capacity to use donations effectively for their intended purpose.
- To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
- To have access to the agency's most recent audited financial statements.
- To be assured their gifts will be used for the purposes for which they were given.
- To receive appropriate acknowledgement and recognition.
- To be assured that information about their donations is handled with respect and confidentiality to the extent provided by law.
- To expect that all relationships with individuals representing the organization will be professional in nature.
- To be informed whether those seeking donations are volunteers, employees of the organization, or hired solicitors.
- To have the opportunity for their names to be deleted from mailing lists.
- To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.
- To be clearly and immediately informed of the organization's name, identity, non-profit or for-profit status, its mission, and purpose when first accessing the organization's website.
- To have easy and clear access to alternative contact information other than through the website or email.

- To be assured that all third-party logos, trademarks, trustmarks and other identifying, sponsoring, and/or endorsing symbols displayed on the website are accurate, justified, up-to-date, and clearly explained.
- To be informed of whether or not a contribution entitles the donor to a tax deduction, and of all limits on such deduction based on applicable laws.
- To be assured that all online transactions and contributions occur through a safe, private, and secure system that protects the donor's personal information.
- To be clearly informed if a contribution goes directly to the intended charity, or is held by or transferred through a third party.
- To have easy and clear access to an organization's privacy policy posted on its website and be clearly and unambiguously informed about what information an organization is gathering about the donor and how that information will be used.
- To be clearly informed of opportunities to opt out of data lists that are sold, shared, rented, or transferred to other organizations.
- To not receive unsolicited communications or solicitations unless the donor has "opted in" to receive such materials.

Donor Privacy

Note: When TWC stated this refers to The Women's Centre Grey Bruce

Policy Statement

All gifts will be entered into a donor database with constituency info from which the gifts were given (e.g. individual, corporation, foundation, organization, fundraising event, etc.) including donor name, contact information, and gift details.

Procedure

TWC uses donor information to understand their interests in its missions and to share agency news and updates. TWC is committed to respecting the privacy of donors. The type of donor information that it collects and maintains are as follows:

- contact information: company/organization name, contact name, address, telephone number(s), websites, email address(es), and social media handles
- giving information
- information on events attended
- information on publications/media received
- special requests for program information
- information provided by the donor in the form of comments and suggestions

TWC respects the privacy of its donors. Donor records are confidential and will not be sold, rented, or otherwise shared externally.

Documentation

Note: When TWC stated this refers to The Women's Centre Grey Bruce

Policy Statement

Official donation receipts will be issued for gifts in compliance with the requirements of the Canada Revenue Agency (CRA).

Procedure

The Women's Centre Grey Bruce will issue official tax receipts fulfilling all the requirements of the CRA.

Each individual donation is to be entered into the donor database and receipted through the same system. Receipts will be mailed/emailed to the donor in a timely fashion.

Gift Entry and Recording

Note: When TWC stated this refers to The Women's Centre Grey Bruce

Policy Statement

All gift entry and recording will be documented through a donor database regardless of the gift form (e.g. cash, in-kind, etc.).

Procedure

All cheques, if received through mail, will be received by the Finance Manager for bank deposit and finance procedure.

After the deposit and accounting process, the Finance Department will forward this information to the Fund Development department for the entry into the donor database, receipt issuance, and donor stewardship.

Records of all in-kind items received will be forwarded to the Fund Development department for entry into the donor database, receipt issuance, and donor stewardship.

Gifts

Note: When TWC stated this refers to The Women's Centre Grey Bruce

Policy Statement

The Women's Centre Grey Bruce accepts gifts that support its mission, that are consistent with CRA guidelines, and are properly accounted for and acknowledged.

TWC accepts the following types of gifts:

- Cash
 - This includes cash, cheque, money order, e-transfer, and credit cards. Cheques should be made payable to The Women's Centre Grey Bruce. Online donations can be made at thewomenscentre.org/donations or by phone.
- Publicly traded securities
 - Securities in the form of publicly traded shares or bonds are accepted. The donation value will be determined based on the market value on the date of receipt of the donation. TWC retains the right to make decisions regarding the disposition or retention of these gifts based on its investment policy.
- Bequests
 - Bequests may qualify as a charitable gift if the terms and conditions of the bequest fall within TWC gift acceptance policies. Official receipts will be issued to the estate of the deceased after TWC receives a copy of all documents naming TWC as beneficiary.
- Life insurance policies
 - A life insurance policy is acceptable if TWC is named as beneficiary or is both the irrevocable owner and beneficiary. The donation value will be determined according to CRA guidelines and an official receipt will be issued after all provincial regulations around consent have been met and the transfer has occurred.
 - Any outstanding premiums are the responsibility of the donor. If the policy lapses for non-payment prior to maturity, TWC may:
 - Continue to pay the premiums
 - Convert the policy to paid up insurance, or
 - Surrender the policy for its current cash value.
- Charitable remainder trusts
 - This type of gift is acceptable if TWC is named as a capital beneficiary of the residual interest. The eligible donation amount will be determined according to CRA guidelines.
- Charitable gift annuities
 - TWC will consider these gifts on an individual basis based on the donor's circumstances and age. Official receipts will be issued according to CRA guidelines.
- Gifts-in-kind

- TWC accepts donations of NEW items only and each will be considered on a case-by-case basis according to CRA guidelines and agency needs.
- The gift must not result in unplanned higher operational costs or financial burden in order to store/liquidate and TWC retains the right to dispose of the gift-in-kind as it sees fit unless an alternative arrangement has been made with the donor.
- When a donor requests an official receipt for gifts-in-kind valued at or above \$1,000, the donor must obtain an independent appraisal to determine the fair market value, at the donor's expense.
- Sponsorship
 - Occurs when a business contributes to the cost of an event or activity and in return, TWC advertises or promotes the business's brands, products, or services. Sponsorships are not considered *gifts* according to the CRA.

Procedure

TWC's Executive Director and/or Board of Directors have the authority to accept or decline all gifts based on CRA guidelines and the agency's priorities. Prospective donors are encouraged to seek the advice of legal and tax professionals on matters of tax/estate planning consequences.

Declining a Gift

Note: When TWC stated this refers to The Women's Centre Grey Bruce

Policy Statement

If a gift/donation is presented which does not fit within the mission of The Women's Centre Grey Bruce , or the gift has maintenance costs which outweigh its value, or includes onerous restrictions, TWC will decline the gift.

Procedure

The decision on declining a gift will be the decision of the Executive Director or Board of Directors. If the donation is declined, the Executive Director or designate will inform the donor immediately and will maintain a file of the decision and due diligence proceedings to support the decision.

TWC may decline a gift for various reasons including but not limited to:

- The gift constitutes a non-gift as per CRA guidelines
- There are features to the gift that are inconsistent with TWC's mission or priorities
- The gift financially or morally jeopardizes TWC
- The gift or terms of the gift are illegal
- TWC is unable to honour the terms of the gift
- An appropriate fair market value cannot be determined or will result in unwarranted costs to TWC
- The gift could improperly benefit an individual or organization

Refund of Donations

Note: When TWC stated this refers to The Women's Centre Grey Bruce

Policy Statement

As specified by the CRA, in most cases, a registered charity cannot return a donor's gift.

Legal advice will be obtained for donors who request a refund on their said gift or donation.

Procedure

If a donor wishes to discuss a refund of their donation, they will be referred to the Executive Director so that their request can be addressed.

At law, a gift transfers ownership of the money or other gifted property from the donor to the charity. Once the transfer is made, the charity is obliged to use the gift in carrying out its charitable purposes. On occasion, a charity may be obliged by law to return a gift to its donor. This can happen, for instance, when a charity asks the public to contribute to a special project and later events make it impossible to carry out the project, or a donor gifts property that did not originally belong to them.