



# Board Manual

GOVERNANCE POLICIES	
Issue Date: September 2016	Review Date
<b>1.20 Donor Gift Acceptance Policy</b>	

## I. DEFINITION

- 1.1 It is a policy that manages the expectations of our donors but also provides our board and staff with consistent practices for reviewing and accepting gifts.

## II. POLICY STATEMENT

- 2.1 A gift acceptance policy is a written compilation of guidelines and suggestions for everyone involved in the gift process from the front-line staff to the Board of Directors. The policy should describe the standards necessary to evaluate various kinds of gifts for acceptance and should allow for some flexibility in handling each case.

- Provides Discipline

The primary benefit of gift acceptance policies is to maintain discipline in gift acceptance and administration. The gift acceptance policy defines

- (1) The types of assets/gifts that are acceptable
- (2) The forms of gifts that are acceptable and
- (3) Our organization's role in gift administration.

Discipline prevents the acceptance of gifts that will cost our organization time, money and possibly its reputation.

- Provides Education

A gift acceptance policy provides education to our staff and Board about the critical issues triggered by certain gifts. It will provide a guide in this early stage of our charitable status to help ensure that we accept gifts, primarily simple monetary gifts, that we can handle well. We will meet the needs and intent of the donor, appropriately thank, recognize and promptly receipt the gift and provide rudimentary stewardship of the donor. Without dedicated fundraising staff we must ensure we have simple rules to guide those responsible for gift acceptance including the finance committee and the Board.

- Preserves Donor Relationships

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Donors are a charitable organization's most valuable asset. Written gift acceptance policies can also be very beneficial in helping to preserve relations with donors when a gift must for one reason or another be rejected. If the donor can be shown written policies, it is much easier for the fundraiser to handle any negative reactions. Written policies remove focus or blame from the contact person and make it clear that the rejection of a particular gift is the result of policies that have been considered and determined in the past. A donor may even gain a greater respect for the professionalism of an organization that is prepared to quickly respond to an offer to make an unusual gift.

3.1 Types of Gifts generally accepted without review:

## Operating Supplies

- Physical Activity Equipment: Ice Skates – all sizes, child and adult, New hockey helmets – for children of all ages to be used for ice skating, Skipping ropes, soccer balls, basketballs, etc.
- Basic Necessities: Warm winter clothing – all warm clothes appreciated, but children's clothing is in high demand, Kitchen items – slow-cooker, blender, etc.
- Healthy Food – Perishable food accepted on Monday mornings, non-perishables accepted anytime during business hours. These items are usually in high need: canned fruits or vegetables, canned fish or meat, dry rice and other grains, tomato sauce, lentils and other canned or dried legumes, beans, cans of soup or hearty stew, powdered, canned or tetra pack milk or milk alternative, fruit and vegetable juice, tetra packs, crackers, cereal, dried fruits and nuts, milkshakes that do not need to be refrigerated, other healthy snack items, ie. Unsweetened applesauce, granola bars
- Gardening: Garden tools, vegetable seeds, bagged manure/compost (accepted in spring and fall)

## Financial Donations

Financial Donations are sought to provide for:

Capital equipment such as treatment room beds, physical activity equipment,

And Capital Building – renovations or building

Cash – Cash gifts are acceptable by cash, cheque or money order.

Marketable securities – Marketable securities may be transferred electronically to an account at the SEGCHC's bank or delivered physically with the transferor's endorsement attached. All marketable securities will be sold promptly upon receipt. In some cases marketable securities may be restricted, for example, by applicable securities laws or the terms of the proposed gift: in such instances the decision whether to accept the restricted securities shall be made by the Finance Committee and reported promptly to the prospective donor.

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Life Insurance – SEGCHC will accept gifts of life insurance only where SEGCHC is named as both beneficiary and irrevocable owner of the insurance policy. The donor must agree to pay, before due, any future premium payments owing on the policy.

Planned Gifts – Where a community member or family member makes a bequest in their will naming the SEGCHC as the recipient of a specific sum of money or one of the types of Gift noted above.

## 4.1 Restrictions on Gifts

SEGCHC will not accept gifts that:

- (a) Would result in violating its Mission, Vision and Values
- (b) Would violate the MSAA with South West Local Health Integration Network or Ministry of Health and Long Term Care
- (c) Would negatively impact our CRA Charitable Status
- (d) Are too difficult or too expensive to administer in relation to their value.

Decisions on the restrictive nature of a gift, and its acceptance or refusal, shall be made by the Finance Committee, in consultation with the Executive Director.

## 5.0 Gift Recording and Acknowledgement

One important key to our fundraising success is how well we manage the backend of gift receipts. The Finance Staff have established a Charitable Receipt Procedure utilizing the Great Plains accounting software. The charitable receipt was designed to the specifications of the Canada Revenue Agency. The charitable receipt and letter template are processed and signed by the Executive Director. A copy of the receipt is maintained for use in the completion of the annual Charitable Return.

### 5.1 Gift Acknowledgement policy and procedure

- (1) Acknowledge all financial gifts within five business days using appropriate template for the charitable receipt/thank you letter, signed by Executive Director.
- (2) The board chair will send an additional thank-you letter to donors of gifts of \$500 or greater.
- (3) The executive director and/or the board chair will call to thank donors of more than \$500.
- (4) A cumulative list of donors and amounts will be circulated to the Board as a component of the Finance Report semi-annually.

## 6.0 Donor Privacy commitment

All information concerning donors or prospective donors, including their names, addresses and telephone numbers, the names of their beneficiaries, the amount of their gift, etc., shall be kept strictly confidential by the SEGCHC, its staff and volunteers, unless permission is obtained from donors to

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release such information.

## 6.1 Donor Acknowledgement in Annual Report

The thank you letter will have wording to tell donors that their gift, (Not amount), will be acknowledged publicly in the Annual Report starting in 2016 unless the donor request anonymity, in which case that will be recorded by staff and the gift not acknowledged in any public way.

### Related Policy

18.0 Finance – Charitable Receipt Procedure

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