



POLICY: Ethical Fundraising

POLICY NUMBER: 3.02

ISSUING AUTHORITY: Community Foundation of
Portage and District Inc.

APPROVED: April 18, 2023

LAST REVIEWED: April 2023

NEXT REVIEW: April 2026

Purpose:

The purpose of this policy is to assure donors of the integrity and accountability of CFPD's fundraising and stewardship practices that respect donors' rights to truthful information. This policy articulates CFPD's commitment to responsibly manage the funds that donors entrust them.

Policy Statement:

A. Donor Policies and Public Representations

1. CFPD or those fundraising on their behalf shall disclose, upon request, whether an individual or entity soliciting contributions is a volunteer, an employee, or a contracted third party.
2. Persons acting on behalf of the Foundation shall, as a preferred practice, encourage the donor to discuss the proposed gift with independent legal and/or tax advisors of the donor's choice to ensure that the donor receives a full and accurate explanation of all aspects of the proposed charitable gift.
3. Solicitations by or on behalf of CFPD shall treat donors and prospective donors with respect. Every effort shall be made to honour their requests
 - to: limit the frequency of solicitations;
 - Not be solicited by telephone or other technology
 - Receive printed material concerning the charity
 - Discontinue solicitations where it is indicated they are unwanted or a nuisance.

B. Fundraising Practices

1. CFPD fundraising affairs shall be conducted in a responsible manner, consistent with the ethical obligations of stewardship and the applicable law.
2. CFPD will not exploit its beneficiaries. It shall be sensitive in describing those it serves (whether using graphics, images or text) and fairly represent their needs and how those needs are to be addressed.

3. CFPD will conduct any online solicitations in compliance with applicable government regulation.
4. CFPD conducts face-to-face solicitations including but not limited to door-to-door campaigns or street-side fundraising, its practices shall include measures to:
 - Provide verification of the affiliation of the person representing CFPD; and
 - Secure and safeguard any confidential information, including credit card information, provided by donors
5. Volunteers and employees who solicit or receive funds on behalf of CFPD shall:
 - Act with fairness, integrity, and with accordance with all applicable laws;
 - Adhere to the provisions of applicable professional codes of ethics, standards of practice, etc.
 - Disclose immediately to CFPD any actual or apparent conflict of interest or loyalty; and
 - Not accept donations for purposes that are inconsistent with the CFPD's objectives or mission.
6. CFPD shall not, directly or indirectly, pay finder's fees, commissions or percentage compensation based on contributions.

Responsibility: Review, and revision of this policy if required, with subsequent recommendation to the Board for approval.