

**Manitoba Wheelchair Sport Association
Policy - Fundraising Policy
Date of Approval: March 27, 2018**

Accessible Formats:

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Policy continues below

Manitoba Wheelchair Sport Association
Fundraising Policy

“Organization” refers to: **Manitoba Wheelchair Sport Association**

This policy was approved by the Board of Directors on March 27, 2018

Section 1: General Fundraising

Definitions

1. The following terms have these meanings in this policy:
 - a. “Venture” – A fundraising proposal that is project-specific or event-specific
 - b. “Sanctioner” – The Organization or the Fundraising Sub-Committee
 - c. “Donors” – The parties (groups, organizations, individuals) that are solicited for funds

Purpose

2. The Organization supports raising funds through fundraisers and suggests that each team or participant consider its own fundraising activities. This Policy will assist both the Organization and its teams and participants with making proper and informed decisions about fundraising; particularly so that all fundraising ventures have a likelihood of profitability, effectiveness, efficiency, and are reflective of the Organization’s values.
3. Further, the Organization is a recognized charitable organization based in Manitoba. This policy will assist the Organization in the policy and procedures on the acceptance of donations, the recognition of donors, and the general guidelines that the Organization will follow in administering donations.

Application of this Policy

4. This Policy applies to the Organization and its teams and participants.

Fundraising Committee

5. The Board of Directors from time to time shall establish a fundraising sub-committee. This committee shall:
 - a. Adhere to MWSA’s Fundraising Policy and Guidelines;
 - b. Evaluate Proposals for new events and choose new campaigns;
 - c. Organize Volunteers and execute fundraising campaigns;
 - d. Provide final reports for recordkeeping and future references
6. In assisting the committee in their duties, the committee shall have access to:
 - a. MWSA membership and volunteer databases
 - b. Financial information of the Organization;

Fundraising Principles

7. The Organization and its teams and participants shall consider and apply the following principles when determining whether or not to approve a fundraising Venture:
 - a. Profitability; whether or not the result of the Venture is expected to exceed the time and resources invested in its implementation
 - b. Feasibility; that the Venture is able to be executed and monitored
 - c. Cost-effectiveness; that all costs (both up-front and hidden) must be factored into the expenses of the Venture
 - d. Jurisdiction; that the team or participant receiving the benefits of the Venture is identified and clarified
 - e. Adheres to values; that the Venture must be in line with the values of the Sanctioner
 - f. Unconfirmed income; that the funds raised from the Venture must not be budgeted as hard revenue
 - g. Tax receipts; that the Venture must respect all federal and provincial regulations governing fundraising and tax receipts
8. The group, committee, person, or entity proposing a Venture must submit a written proposal that answers the following questions:
 - a. What is the Venture?
 - b. How long will the Venture last?
 - c. Is the Venture province-wide or regional?
 - d. What potential Donors will the Venture solicit for funds?
 - e. What staff resources from the Sanctioner will be required?
 - f. Does the Sanctioner need to apply for a license or use of the Organization's charitable status?
 - g. What other expenses will be required to start or maintain the Venture?
 - h. Will the Sanctioner be required to partner with the group, company, or organization?
 - i. What funds, resources, or other benefits are expected to be gained from the Venture?
 - j. Who benefits from the Venture and what is the distribution of benefits?
 - k. What can go wrong with the Venture and how have these risks been managed?
9. The proposal must be submitted to the Sanctioner for approval before the Venture may begin. The Sanctioner shall approve or reject the proposal within fifteen (15) days of receiving it.
10. If the proposal is rejected, the Sanctioner shall explain reasons for the rejection. A revised proposal may be submitted to be accepted or rejected by the Sanctioner within ten (10) days of receiving the revision.

Organizational Approval

11. The Organization must approve any Ventures that are intended to be province-wide and that may solicit funds primarily from outside the region. Further, any Ventures that may be in direct competition or conflict (in terms of location or Donors solicited) with Ventures from other organizations must also be approved by the Organization.
12. Approval must be obtained from the Organization before any Venture is initiated that is radical, unusual, or that contravenes sections of this policy.

Solicitations

13. Donors solicited must receive informed, accurate, and ethical advice about the value and tax implications of contributing to the Venture.
14. All communication with Donors must be accurate, reflect the Sanctioner's values, and conform to this policy

Post-Venture Procedure

15. Once the proposal has been approved, and during and after the Venture's fundraising activities, the Venture must:
 - a. Comply with all applicable provincial and federal laws;
 - b. Not engage in activities that harms members or volunteers, that conflict with ethical or legal obligations (pursuant to the Organization's Code of Conduct and Ethics and the Organization's Conflict of Interest Policy), or that exploit a relationship with a potential Donor, member, employee, or volunteer;
 - c. Track all funds and benefits collected, record all expenses, and determine the net result of the Venture;
 - d. Distribute benefits and funds as per the Venture's proposal;
 - e. Seek approval from the Sanctioner before distributing funds and benefits outside of the scope of the proposal
16. When the Venture has concluded, a report must be submitted to the Sanctioner detailing the result of and distribution of funds and benefits from, the Venture. If approval from the Organization was required for a Venture (under the Organization Approval section of this Policy) a report must also be submitted to the Organization
17. If the Venture has utilized the Organization's staff or resources, a 10% fee will be withheld or must be submitted to the Organization at the conclusion of the Venture.

Section II: Donor Acquisition

Donor Rights

1. MWSA acknowledges that donors have the following rights:
 - a. To be informed of the organization's mission, vision, and guiding principles, and the methods that MWSA intends to use donated resources, and its capacity to use donations effectively for their intended purpose;
 - b. To be informed of the identity of those serving on the organization's board of directors, and to expect the Board to exercise prudent judgement in its stewardship responsibilities;
 - c. To have access to the organization's most recent audited financial statements;
 - d. To be assured that their gifts will be used for their intended purpose;
 - e. To receive appropriate acknowledgement and recognition in accordance with requirements established by the Canada Revenue Agency;
 - f. To be assured that information about their donations are handled with respect and confidentiality to the extent provided by law;
 - g. To expect that all relationships with individuals, representing organizations of interest to the donor will be professional in nature;
 - h. To be informed whether those seeking donations are volunteers, employees of the organization, or hired solicitors;
 - i. To have the opportunity for their names to be deleted from mailing lists;
 - j. To feel free to ask questions when making a donation and to receive prompt, truthful, and forthright answers.

General Principles

2. MWSA will only accept donations or in-kind support that is consistent with its values and mission.
3. MWSA will ensure that its name and assets are protected at all times.
4. MWSA's name or other items may only be used for commercial or promotional purposes with the consent of the Executive Director or the Board of Directors.
5. MWSA will maintain complete control of accepted funds and remain consistent with donor restrictions when applicable.
6. Recognition of major supporters will be developed in cooperation with donors and consistent in terms of the level of support MWSA receives. MWSA will seek to develop recognition opportunities that are appropriate and meaningful to donors, supporters, and MWSA.

Donor Privacy

7. MWSA is committed to respecting the privacy of donors. The types of donor information that it collects and maintains include:
 - a. Contact information: name, telephone, e-mail
 - b. Donation information
 - c. Information provided by donor in the form of comments or suggestions.
8. MWSA uses the information to update donors about the organization's plans and activities.
9. The information collected is used for form a database of supporters for future agreements.
10. All information concerning donors or prospective donors is confidential, and will only be shared with the permission of the donor.

Gift Acknowledgement

11. Acknowledgement of all gifts will be completed within one month and include charitable tax receipts as required by the Canada Revenue Agency.
12. Gifts of \$25 - \$250 will be acknowledged with a preprinted card and receipt signed by the Executive Director.
13. Gifts of over \$250.00 will be acknowledged with an appropriate thank-you letter, including the required CRA language, and a charitable tax receipt signed by the Executive Director.
14. Gifts of \$500 or more will be acknowledged with a direct phone call from the Executive Director, and the Executive Director will provide a thank-you letter inclusive of the required CRA language and charitable tax receipt signed by the Executive Director.

Donor and Supporter's Fund Distribution

15. General donations and in-kind support will be distributed under the direction of the Board of Directors.
16. MWSA Clubs and Members may submit funding requests to be considered at a Board of Directors Meeting