



SUBJECT: DONATIONS, SPONSORSHIP AND FUNDRAISING POLICY

Policy No: 2021-06

Date: February 16, 2021

Review Date: February 2025

Pages: 8 (with appendix)

PURPOSE

The purpose of this policy is to provide guidelines with respect to the acceptance of donations and the creation and administration of sponsorship partnerships and fundraising campaigns.

POLICY

General

The Innisfil ideaLAB & Library gratefully accepts and encourages donations, gifts and sponsorship from individuals, groups, foundations and corporations for the purpose of enhancing the services of the library system. The Library provides service to the community in accordance with the Library's mission, values and strategic goals.

All donations constitute a complete transfer from the previous owner to the Library. Unless a mutual agreement between the Library and the donor is achieved, if the owner is unwilling to transfer full ownership and rights then the gift will be declined with thanks.

The Innisfil ideaLAB & Library has no obligation to inform the donor of the disposition of the donated materials, to retain intact, or to reserve special library shelving for unsolicited gifts of private collections. Donations will be accepted on the understanding they will be used in accordance with the criteria established in this policy. As a rule, donated materials will not be accepted as payment for lost or damaged library materials.

The Innisfil Public Library Board accepted the Canadian Library Association Corporate Sponsorship Agreement by Motion #99.46 and continues to endorse its message (*Appendix A*) through this policy.

Application

This policy applies to all Staff, and Members of the Board, and all residents, businesses and organizations seeking to assist the Library through the provision of donations and gifts and the creation of sponsorship partnerships.

DEFINITIONS:

Cash - Cash includes cheques, money orders, bank drafts, and money (bills & coin). Donations made by debit card and by credit card are also considered cash gifts.

Donation- A donation is a gift, contribution of cash, or goods given voluntarily to the Library as a philanthropic act without expectation or requirement of reciprocal benefit. A designated donation is one that is to be used for a specific purpose. An undesignated donation is one that has no stipulations on use.

Gifts in Kind – Gifts in kind, also known as non-cash gifts, are gifts of property. They cover items such as artwork, equipment, securities, and cultural and ecological property. A contribution of service, that is, of time, skills or effort, is not property and, therefore, does not qualify as a gift or gift in kind for purposes of issuing official donation receipts. (www.cra-arc.gc.ca/chrts-gvng/chrts/qlssry-eng.html [1])

Sponsorship – A sponsorship is a mutually beneficial exchange between the Innisfil ideaLAB & Library and an outside organization, in which an external party makes a contribution of cash or in-kind goods or services to the Library in return for recognition, acknowledgements or other considerations. Sponsors receive a benefit of reciprocal value in return for their support and contribution.

Guidelines

The Innisfil ideaLAB & Library welcomes and accepts different types of gifts as defined by the Canada Revenue Agency. Where applicable, the Library may require the donor to have his/her property appraised by a certified appraiser at a shared expense with the Library before a decision as to whether or not a donation will be accepted.

The Innisfil ideaLAB & Library appreciates the generosity of those who wish to donate, and in accordance with the Innisfil ideaLAB & Library's Collection Management Policy, the Library accepts donations of materials for its collections (subject to the conditions set out in the policy).

Donations to the Local History and Archives department must align with the selection criteria identified in the Library's Collection Management Policy and the Local History Policy.

This policy does not supersede prior agreements. Any restrictions in existence as of the effective date of this policy may remain as restrictions to disposal and the Library Board will be governed by its prior commitments. This includes memorial gifts of art which may not normally be disposed of unless the donor or donor's representative has given approval.

Donations

Cash Donations

Gifts of cash are accepted and are used to enhance the services of the library system.

The Library reserves the right to use undesignated donations in the best interest of the Library, and shall make decisions regarding the investment, disposition and/or eventual disposal of all donations.

Both designated and undesignated donations are welcomed. For designated donations, the Library will direct the donation to a specific purpose as outlined by the donor.

Unless otherwise specified by the donor, cash donations received during the year are to be transferred to a Donations Reserve. Use of funds in the Reserve requires Board approval before being spent.

The Board will be informed of individual cash donations of \$10,000 or more. Staff will advise the Board of such donations and bring forward a recommendation for use of the funds such as transfer to the Donations Reserve or use for a specific purpose.

Acceptance and handling of cash donations shall adhere to the Library's Cash Handling Policy.

Gifts in Kind

Gifts in kind, also known as non-cash gifts, are gifts of property. They cover items such as artwork, equipment, securities, and cultural and ecological property.

A contribution of service, that is, of time, skills or efforts, is not property and, therefore, does not qualify as a gift or gift in kind for purposes of issuing official donation receipts. (www.cra-arc.gc.ca/chrts-gvng/chrts/glssry-eng.html [1])

- Art
 - The Library accepts artwork of historic/documentary value related to the history of the Town of Innisfil as appropriate and as described in its Collection Management Policy and Local History Policy.
 - The Library does not act as a repository of the works of local artists or of portraits of local persons.

- The Library does not actively collect, seek or accept unsolicited donations or purchase art for decorative, artistic or commemorative purposes unless it is a Commission of Art for a new building specifically commissioned by the Library Board.
- The Library Board reserves the right to refuse to accept any artwork considered by it to be inappropriate and/or unsuitable for a library environment.
- Valuable Papers/Collections

The Library accepts gifts of papers/collections of historic/documentary value related to the history of the Town of Innisfil as determined by its Collections Policy.

- Property

Gifts of property, real estate and tangible property are administered by the CEO.

- Deferred Gifts including Bequests/Life Insurance

A deferred gift is arranged now, but is not available for use by the Library until some future time, usually after the death of the donor. With a deferred gift, a portion or all of a donor's assets may be designated by bequest to benefit the Library. Such gifts may be made by will or beneficiary designation

Sponsorships

A sponsorship is a mutually beneficial exchange between Innisfil ideaLAB & Library and an outside organization, in which an external party makes a contribution of cash or in-kind goods or services to the Library in return for recognition, acknowledgements or other considerations. Sponsors receive a benefit of reciprocal value in return for their support and contribution.

Sponsors are required to have sponsorship agreements and need to align with our policies and practices and do not imply endorsement of products by the Library. Sponsors may not influence the goals and objectives of Library programs. Entering into sponsorship agreements does not suggest endorsement of products or services by Innisfil ideaLAB & Library.

The Library reserves the right to immediately terminate an existing sponsorship if the sponsor uses the Innisfil ideaLAB & Library's name outside the parameters of the agreement, without prior consent, or if the sponsor develops a public image inappropriate to the Library's service and philosophy. In case of a change in sponsor ownership, name or both during the term of the agreement, Innisfil ideaLAB & Library reserves the right to immediately cancel the agreement if the new organization fails to

meet any of the principles or conditions outlined in this policy or in the contractual agreement.

All sponsorship agreements must include the dates of the agreement, must clearly indicate what the sponsor is contributing and the value of that contribution (best market value estimate) and the forms of recognition the Library will provide to the sponsor in return. The agreement must be signed by the CEO or Designate and by authorized representatives from the external organization.

The Library will ensure that the confidentiality of its records is maintained and will not sell or provide access to customer records in accordance with applicable Library policies and legislation.

Naming rights may be assigned to a donor or sponsor, provided that the Library's image is not compromised. The naming opportunity must be detailed in a plan that has been approved by the Innisfil Public Library Board prior to the solicitation of donations or sponsorships. Any Sponsors' corporate names and/or logos may not have prominence over the Innisfil ideaLAB & Library's name and/or logo. The Library reserves the right to determine the placement of such names and logos.

The Innisfil ideaLAB & Library and the Innisfil Public Library Board endorses the Canadian Library Associations Position Statement on Corporate Sponsorship Agreements in Libraries (approved by CLA See - Appendix A). All donations, gifts, sponsorship and fundraising programs will be consistent with the Innisfil ideaLAB & Library's mission, values and strategic goals. The Library reserves the right to decline any donation, gift or sponsorship opportunity that is deemed to be inappropriate or unsuitable to the advancement of the mission, values, and strategic objectives of the Library.

Sponsorships agreements valued at \$10,000 or more shall be presented to the Library Board for approval. Sponsorship agreements valued at less than \$10,000 may be approved by the CEO or Designate and will be reported to the Board.

Fundraising

Staff will develop and implement appropriate fundraising strategies to achieve fundraising targets, while maintaining awareness and respect for fundraising endeavours undertaken by others within the Town of Innisfil.

The Library may approve special fundraising ventures which it deems suitable in fulfilling its mission, values, goals and objectives, and which will not compromise the Library's public image. All funds raised will be used for the stated purposes and

established priorities of the fundraising program as determined by the Library in the fundraising strategy.

- **Library Support Groups**

Library Support Groups (such as the Friends of the Library) wishing to financially support and/or advocate on behalf of the Innisfil ideaLAB & Library will have their terms of reference and governance by-laws approved by the Innisfil Public Library Board. Annual reports will be made to the Library Board summarizing their activities.

Recognition

The Innisfil Public Library Board will maintain a donor recognition program in support of its Donations, Sponsorship & Fundraising Policy. The purpose of the donor recognition program is to thank donors, to encourage others to give, and to steward a healthy long-term relationship between the Library and its donors. Every effort is made to ensure that recognition is timely, meaningful to the donor, appropriate and equitable.

Recognition of donors will conform to established guidelines.

Recognition programs will honour individuals, corporations, service clubs, community organizations and philanthropic foundations that make monetary and/or gifts-in-kind donations, as well as government agencies that provide direct cash grants to the Innisfil ideaLAB & Library for the purpose of enhancing library services.

Donor recognition programs for special fundraising initiatives, such as a capital campaign, will be developed as a part of the campaigns.

The formal recognition of government grants or corporate partners in library programs and/or services is normally dictated by the terms of the grant or agreement and may require the inclusion of government or partners' logos in print or electronic publications relating to the grant or agreement.

Use of funds raised and fundraising operating expenses will be in accordance with Revenue Canada Taxation guidelines and every effort will be made to maximize dollars raised in relationship to dollars spent.

All records pertaining to established and potential donors will be held confidentially and in accordance with relevant legislation and Library policies.

The Library will also respect the wishes of any donors wishing to remain anonymous.

Charitable Receipts

Charitable receipts are issued for cash donations, appraised donations of art and valuable papers, as well as in-kind donations. Charitable receipts cannot be issued for more than the fair market value as determined by an independent appraiser.

Deadlines may be applied to ensure that donations are received in time to be receipted in the current tax year. Receipts cannot be backdated.

Appendices

Appendix #1 – CLA Position Statement – Corporate Sponsorship Agreement in Libraries.

Approved by the Innisfil Public Library Board, February 16, 2021,
Motion Number: 2021.18

Supersedes Policy #2014-20, Approved October 20, 2014, Motion 2014.73;
Policy #2009-05, Approved February 17, 2009, Motion #2009.16,
Policy #2006-05, Approved March 20, 2006, Motion #2006.23,
Policy #2001-11, Approved November 8, 1999, Motion #99.46, and
Policy #2001-05, Approved September 9, 1991, Motion #91.50.

Canadian Library Association
Position Statements

Corporate Sponsorship Agreement in Libraries
Approved by Executive Council ~ June 21, 1997

Libraries enrich lives, provide information needed for work and daily living, and foster informed communities which are essential to a democratic society. In recognition of this important function, communities support libraries through public funding. The library's first priority is to ensure the continuation and growth of this primary relationship -- public funding for the public good.

CLA encourages and supports advocacy to maintain and develop public funding as the principal source of support for public, school, academic and government libraries.

Publicly funded libraries can and do explore other sources of funding, such as grants, gifts, donations, partnerships and sponsorships, to ensure that they provide the best possible services to their communities. Corporate sponsorships are one source of additional support that allows libraries to enhance the level, extend the range, or improve the quality of library service.

To ensure that partnerships enhance the library's image and add value to library services, libraries need to develop policies and sponsorship agreements that outline the conditions and the benefits of the sponsorship arrangement.

CLA believes that the following principles are important in developing sponsorship policies and agreements. Libraries have a responsibility to:

1. demonstrate that sponsors further the library's mission, goals, objectives and priorities, but do not drive the library's agenda or priorities.
2. safeguard equity of access to library services and not allow sponsorship agreements to give unfair advantage to, or cause discrimination against, sectors of the community.
3. protect the principle of intellectual freedom and not permit sponsors to influence the selection of collections, or staff advice and recommendations about library materials, nor require endorsement of products or services.
4. ensure the confidentiality of user records by not selling or providing access to library records.
5. be sensitive to the local political and social climate and select partners who will enhance the library's image in the community.