

The Metchosin Foundation - Donor Policy Guide 2013

DONOR POLICIES AND PUBLIC REPRESENTATIONS

1. The Metchosin Foundation shall treat all donors and prospective donors with respect. Requests from a donor or prospective donor to remain anonymous shall be honored to the greatest extent possible where permitted by law.
2. The Metchosin Foundation shall prepare Income Tax Receipts for monetary gifts and for gifts-in-kind (where accepted) in compliance with all regulatory requirements. The Foundation shall encourage donors to seek independent advice if it has any reason to believe the proposed gift could significantly affect the donor's financial position or family relationships. Donors will have the right to see their donor records upon request.

FUNDRAISING PRACTICES

3. All fundraising solicitations on behalf of the Metchosin Foundation shall be truthful and accurate.
4. Volunteers, employees, and third party solicitors who act on behalf of the Metchosin Foundation shall adhere to principles of ethical fundraising, such as:
 - i. act with fairness and integrity;
 - ii. adhere to professional standards of practice and ethical codes;
 - iii. respect the wishes of those who do not wish to be solicited;
 - iv. disclose any conflicts of interest to the Metchosin Foundation; and
 - v. not accept donations for purposes that are inconsistent with the charity's objectives or mission.
5. The Metchosin Foundation shall not sell its donor list, nor otherwise disclose it unless required by law.

FINANCIAL PRACTICE AND TRANSPARENCY

6. All donations shall be used to support the Metchosin Foundation's charitable objectives. The Metchosin Foundation endeavors to use all designated or restricted donations for the purposes for which they were given, wherever practicable and permitted at law. However, the Metchosin Foundation retains the discretion to use designated or restricted donations for other purposes, provided that those purposes are within the charitable objectives of the Metchosin Foundation.
7. The Metchosin Foundation shall achieve transparency and accountability to donors and to the public by making its annual financial reports available upon

request. The financial reports shall:

- i. be factual and accurate;
- ii. disclose the gross amount of fundraising revenues and gross amount of fundraising expenses; and
- iii. disclose all donations that are received for income tax purposes and the total amount of expenditures on charitable activities

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