

Fundraising Activities Policy

Department	Philanthropy	Policy No.	PHIL-01
Category	Code of Conduct	New	(X) March 6, 2015
Reviewed by	Management Team	Reviewed Reviewed Reviewed Revised	(X) December 30, 2015 (X) July 29, 2016 (X) November 1, 2022 (X) February 17, 2026
Approved by	Chief Executive Officer	Dates Approved	(X) January 3, 2023 (X) April 1, 2026

1.0 Introduction:

It is the policy of Lakeridge Health Foundation (the “**Foundation**”) that its fundraising activities will be guided and informed by its Vision and Mission supporting Lakeridge Health. Foundation staff, Board of Directors, and its volunteers, adhere to a wide range and inclusive model of governance and not-for-profit best practices. The Foundation adheres to the Association of Fundraising Professionals Code of Ethics and Donor Bill of Rights.

The Foundation secures donations by:

- Hosting annual events
- Distributing direct mail campaigns throughout the year
- Actively soliciting donations from individuals, corporations, foundations and service clubs

Volunteers and staff who receive funds on behalf of the Foundation must:

- Act with fairness, integrity, and in accordance with all applicable laws
- Cease contacting a prospective donor who states that he/she does not wish to be contacted
- Disclose immediately to the Foundation any actual or apparent conflict of interest or loyalty
- Not accept donations for purposes that are inconsistent with the Foundation’s mission

All fundraising done by or on behalf of the Foundation must:

- Be truthful
- Accurately describe the Foundation’s activities
- Disclose the organization’s name
- Disclose the purpose for which funds are requested
- Disclose the organization’s policy with respect to issuing official income tax receipts including any policy on minimum amounts for which a receipt will be issued, and
- Disclose, upon request, whether the individual or entity seeking a donation is a volunteer or employee

Any written solicitations by or on behalf of the Foundation includes its address, Canada Revenue Agency charitable registration number, and staff contact information.

2.0 Treatment of Donors and Donor Information:

The Foundation honours donors' and prospective donors' requests to:

- Limiting the frequency of contact
- Not be contacted by telephone or other technology
- Remain anonymous
- Receive printed material concerning the Foundation
- Discontinue contact

The Foundation respects the privacy of its donors. Donor records are kept confidential to the greatest extent possible. Donors have the right to see their own donor record and to challenge its accuracy. The Foundation does not sell, rent, exchange, or otherwise share its donor lists.

3.0 Payment of Fundraisers:

The Foundation does not, directly or indirectly, pay finder's fees, commissions or percentage compensation based on contributions.

4.0 Transparency:

To demonstrate transparency and accountability, the Foundation posts a variety of information on its website under [Accountable to You](#). Information posted on the website includes our financial statements, donor reports, T3010, Board of Directors, Complaints Policy, Freedom of Information and Privacy Policy, Code of Conduct Policy, Restricted or Designated Gifts Policy, and Indigenization, Inclusion, Diversity, Equity, and Accessibility Policy.

5.0 Gift Acceptance:

The Foundation will accept unrestricted gifts and gifts for specific areas of the Hospital. All gifts must have purposes that align with Lakeridge Health Foundation and Lakeridge Health.

Types of Gifts Accepted:

- Gifts of Cash
- Gifts in Kind
- Life insurance
- Planned Gifts/Bequests
- Gifts of publicly traded security
- Corporate sponsorship
- Donor Advised Funds (DAF)



5.1 Gifts of Cash:

Receipts will be issued for gifts of cash based on the amount received. Year-end gifts will qualify for the current tax year if they are post marked in the current year or officially received at the Foundation's office in the current year.

5.2 Gifts in Kind

Non-cash gifts will be valued and receipted based on appraisals obtained by the donor and, in some instances, the Foundation. For gifts over \$1000 for which a tax receipt is reissued, an independent appraisal is required. It is the Foundation's practice to have donors pay for appraisals; however, the Foundation reserves the right to obtain, at its own expense, an independent appraisal.

Cross Reference:

For the acceptance of restricted or designated gifts, please refer to Gov-15 Restricted and Designated Gifts Policy.

This is a public document in the 'Accountable to You' section of the website.