

008 - OPLB Donations, Fundraising, Sponsorships, Advertising and Naming

General Fundraising Principles

The Library receives the majority of its funding from the City of Ottawa and generates additional revenues through grants, service fees, and associated fines. Since the Library is a corporation under the *Public Libraries Act, R.S. O. 1990, c. P. 44*, and has received charitable status with Registration #861292886 RR0001, it may also receive donations and solicit funds.

The Library primarily receives additional funds or revenues through the following:

1. Donations (unsolicited)
2. Fundraising (solicited)
3. Sponsorships, Advertising, and Commemorative Naming

All donations or contributions to the Library shall be used to further its vision and mission. Where funds are solicited, solicitations shall be conducted in a respectful manner and without pressure.

The Library may apply for grants when appropriate circumstances permit in keeping with the approval requirement identified in the Board Delegation of Authority Policy.

Donations

A donation is defined as a gift of money, real or personal property, and personal services provided without consideration.

Gifts which will benefit the Library are welcomed by the Library and the individuals or groups contemplating making a donation are encouraged to discuss the appropriateness and need for the donation in advance with the CEO or designate, as identified in OPL policies. The CEO shall ensure that any donation accepted by the Library is beneficial to the community as a whole and is handled in a transparent manner.

Materials donations shall be accepted provided they supplement and enhance the Library's collections. Retention of donations shall be based on the same criteria used for purchasing material as outlined in the Library's approved Collection Management framework. Surplus items will be given from the Library to the Friends of the Ottawa Public Library for their book sales.

The Library reserves the right to accept or decline any proposed gifts or establish a donations moratorium from time to time. In determining whether a gift will be accepted, consideration shall be given to Library policies, goals, and objectives.

Donation Practices

To facilitate the efficient operation of the donations policy, the CEO shall:

- clearly state and disseminate library policies regarding donations;
- ensure procedures are in place to, receive and process donations made directly to the library; and,
- develop and maintain a detailed list of Library funding priorities.

Donor Information and Privacy Policies and Practices

Donors who supply the Library with their personal information including telephone number, postal address, or email address may be contacted periodically for solicitation purposes and/or with information regarding upcoming events upon their consent.

Donors may request to be permanently removed from the mailing list by contacting the organization via phone, email, or postal mail and all such requests shall be honoured.

Any information supplied to the Library by donors will be used solely to fulfil their donation and shall not be shared for any reason unless permission is granted by the donor to share such information. All donor requests to remain anonymous shall be honoured. The Library does not sell or share donor lists.

Fundraising

All fundraising activity for the Library is supervised by the Board, and coordinated and directed through the CEO.

The Board shall annually review all Library fundraising activity and results. Fundraising events of significant nature organized or sponsored by the Library (e.g. capital campaigns) shall obtain Board approval before any fundraising activity begins.

All third parties not directly affiliated with the Library who wish to solicit funds on behalf of the organization must acquire written permission from the CEO prior to beginning any fundraising activities.

The CEO shall:

- ensure that the Library complies with the requirements of the *Income Tax Act*, applicable regulations and policies of the Canada Revenue Agency, and all other acts and regulations associated with fundraising and donations;

- review fundraising or solicitation materials prior to publication for material omissions or exaggerations of fact, use of misleading photographs, or any other communication which would tend to create a false impression or misunderstanding, and any statements or content that would tend to create unrealistic donor expectations of what the donor's contribution will actually accomplish;
- provide all donors with specific acknowledgments of charitable contributions, where applicable, in accordance with legal requirements for proper donor substantiation and the organization's disclosure;
- not compensate internal or external fundraisers based on a commission or a percentage of the amount raised;
- not sell or otherwise make available the names and contact information of its donors, except where disclosure is required by law;
- not send mailings on behalf of other organizations; and
- provide a clear, prominent and easily accessible privacy statement on any of its websites that tells visitors what information, if any, is being collected about them and how this information will be used; how to access personal information collected and request correction and how to inform the Library that the visitor does not wish his/her personal information to be shared outside the organization; and what security measures the Library has in place to protect personal information.

Donations or Fundraising Involving Naming Rights

The acceptance of any philanthropic donation that involves a proposal to name a library building or space within a library is conditional upon approval of the naming by the Library Board.

Requests for naming shall be submitted in writing to the CEO for initial consideration and negotiation. No commitment regarding the naming of a library or space within a library shall be made to an individual or group prior to the final approval of the related proposal (both naming and associated financials) by the Library Board.

The size of the donation associated with naming opportunities, including renaming facilities, shall be clearly disclosed to the Board for their consideration when making a final decision or such a request. All donations from the Friends of the Ottawa Public Library Association regarding the naming of a library building or space shall be referred to the Library Board for consideration, and will also be reviewed in accordance with this policy.

Sponsorship, Advertising and Commemorative Naming Policy

The Library adheres to the sponsorship, advertising, and naming policies established by the City of Ottawa <http://ottawa.ca/en/city-hall/your-city-government/administrative-policies>.

Tax Receipting

Regardless of donation method (unsolicited or solicited), the Ottawa Public Library will issue a charitable receipt for cash donations, or for the value of non-cash donations (except for materials donations), in accordance with the *Income Tax Act* and applicable regulations and policies of the Canada Revenue Agency.

Tax receipts may be issued for the following:

- gifts of cash whether for a general or a specific purpose;
- gifts in kind such as works of art, furniture, equipment, vehicles, depreciable property, capital property, a leasehold interest or a residual interest in real property, inventory of a business, gifts of life insurance policies;
- fundraising activities and events including fundraising activities and events sponsored by third-party organizations or groups where a legal agreement exists between the third-party or group and the Library Board or the Ottawa Public Library; and,
- gifts of certified cultural property and ecologically sensitive lands for which special rules exist.

If appraisals are desired for the purposes of a tax receipt, they must be undertaken at the expense of the donor. Normally gifts valued at less than \$1,000 do not need an appraisal. Receipts are processed through the Financial Services Unit, City of Ottawa, responsible for the Ottawa Public Library.

For acceptable gifts in kind, tax receipts will be issued on the date of donation listed on the Gift of Waiver form, where the donation date is acknowledged by the signature of the Chief Executive Officer or designate.

Effective Date: March 8, 2016

Last Review Date: October 13, 2015