

Donations, Sponsorships & Fundraising Policy

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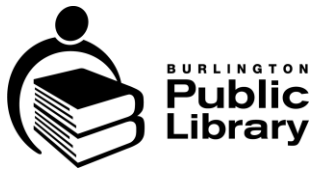
Purpose

Burlington Public Library (BPL) welcomes and encourages donations and sponsorships from individuals, groups, foundations, and corporations for the purpose of enhancing library services and resources. The purpose of this policy is to ensure that all such donations and sponsorships are pursued, accepted, invested, and used in alignment with BPL's mission, values, strategic goals, and appropriate legislation.

Statement of Policy

BPL is a registered charity and follows all relevant rules and regulations of the Canada Revenue Agency (CRA).

Any funds received through fundraising, sponsorships, or donations are considered supplemental to the library's core funding and will not be budgeted for or relied upon to fund day to day operations.



The Burlington Public Library Board (Board) will ensure that the nature of the library's decisions, collections and services will not be influenced by the existence of donations, sponsorships, or fundraising receipts.

All donations must be free and clear from encumbrances and will become the exclusive property of BPL unless otherwise agreed upon by all parties.

The Library reserves the right, at its absolute discretion, to accept or decline any donation or to negotiate with the donor, or representatives, concerning any aspect of the donation.

Definitions

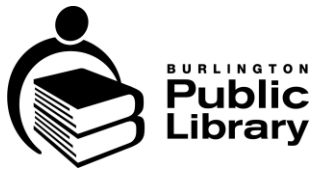
Cash Gifts: Cash gifts include funds received by cheque, money order, bank draft, money (bills & coin), debit or credit card.

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.

Fundraising: The legitimate process of collecting money by requesting donations from individuals, groups, foundations, and corporations.

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. Review the Canada Revenue Agency Charities and Giving glossary for details.

Sponsorship: A sponsorship is a mutually beneficial exchange between Burlington Public 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 and therefore no charitable tax receipt is issued.



Types of Donations

Cash Donations

Both designated and undesignated cash donations are welcomed. For designated donations, BPL will direct the funds to the specific purpose as outlined by the donor. Where no designation is made by the donor, cash donations will be directed towards the purchase of library collections unless otherwise decided by the Board.

CanadaHelps.org is a non-profit organization that facilitates online donations and charitable tax receipts for not-for-profits, including libraries. A small percentage of the donation is retained to support this organization.

The Board is committed to working with the Burlington Foundation (BF). BPL has a long-standing partnership with BF in managing its endowment funds. Endowments are gratefully accepted and directed to the BF on behalf of the Library. This foundation manages BPL's endowments and provides the Library Board with the investment income annually. The Board approves the expenditures of these funds consistent with the specifications of the funds.

Gifts in Kind

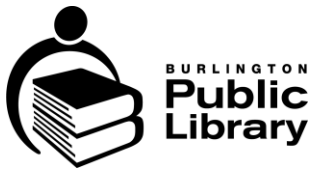
BPL welcomes and accepts different types of donations as defined by the Canada Revenue Agency. Where applicable, the Library may require the donor to have his/her property appraised by a certified appraiser at a shared expense with the Library before a decision is made as to whether a donation will be accepted.

Gifts of books, other collection materials and equipment are accepted under the condition that the Library has complete jurisdiction over their allocation and that the gifts adhere to the BPL's Collection Development policy.

The Board does not guarantee that collections of items will be kept intact except in special circumstances of historical importance; BPL does not guarantee items will be kept permanently.

Art & Valuable Papers/Collections:

- BPL accepts artwork, papers and collections of historic/documentary value related to the history of the City of Burlington as appropriate and as described in its Collection Development and the Local History Collection Policy.



- BPL does not act as a repository of the works of local artists or of portraits of local persons.
- BPL 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 Board.
- The Board reserves the right to refuse to accept any artwork considered by it to be inappropriate and/or unsuitable for a library environment.

Non-cash Gifts:

- Gifts of securities are welcomed and are directed to BPL's endowment funds managed by the Burlington Foundation.

Property:

- Gifts of property, real estate and tangible property are administered through the office of the Chief Executive Officer.

Deferred Gifts including Bequests/Life Insurance:

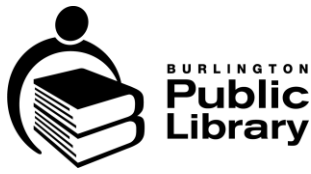
- A deferred gift is arranged now but is not available for use by BPL until some future time, usually after the death of the donor. With a deferred gift, a portion or all a donor's assets may be designated by bequest to benefit the Library. Such gifts may be made by will or beneficiary designation. Persons interested in making deferred gifts are directed to the office of the Chief Executive Officer.

Sponsorships

Sponsors are required to enter into a written sponsorship agreement, signed by authorized representatives of both parties. 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) as well as the forms of recognition BPL will provide to the sponsor in return.

Sponsors may not influence the goals and objectives of BPL. Entering into sponsorship agreements does not suggest endorsement of products or services by BPL.

The Library reserves the right to terminate an existing sponsorship if the sponsor uses BPL's name outside the parameters of the agreement, without prior consent, or if the sponsor develops a public image inappropriate to BPL's mission, values and strategic



goals. In case of a change in ownership or name or both of a sponsor during the term of the agreement, BPL 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.

BPL 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.

Any naming opportunity included in a Sponsorship Agreement will conform to the Naming of Burlington Public Library Rooms and Spaces Policy and will be assessed in accordance with that policy.

Development and Approval of Fundraising Plans

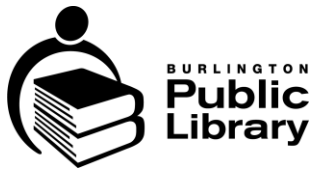
BPL will develop and implement fundraising strategies such as the establishment of endowment funds or capital campaigns for major initiatives such as large-scale renovations or the building of new facilities.

All proposed fundraising activities must be approved by the Board. Awareness and respect for fundraising endeavours of other charitable organizations in the City of Burlington will help to inform timing and scale of fundraising strategies to be undertaken. All fundraising initiatives will be tracked and coordinated to avoid duplication of funding requests and solicitations.

The Board reserves the right to reject any fundraising initiative deemed inappropriate or not in keeping with BPL's mission, values, strategic goals, and policies.

Official Donation Receipts

Charitable receipts are issued in accordance with CRA regulations for any cash donations, appraised donations of art and valuable papers, and in-kind donations with a value exceeding twenty dollars (\$20). Charitable receipts cannot be issued for more than the fair market value as determined by an independent appraiser. BPL reserves the right to secure and rely on its own appraisal in determining the acceptability of a gift and the fair market value of an item.



Donor Recognition Policies

BPL will acknowledge all gifts and donations to the Library in a manner commensurate with the value of the gift.

Donor Records

BPL shall maintain donor records, the contents of which shall remain confidential unless the donor agrees otherwise.

Appendices

· Appendix 1: References

Appendix 1: References

- Canada Revenue Agency Charities and Giving glossary:
<https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/charities-giving-glossary.html>
- Waterloo Public Library Fundraising, Gifts and Sponsorships Policy:
https://www.wpl.ca/sites/default/files/policies_documents/finance/policy-3-5-fundraising-gifts-and-sponsorships.pdf
- Oakville Public Library Donations, Sponsorships and Fundraising Policy:
<https://opl.ca/About-OPL/Policies/Fundraising-and-Development-Policies>
- Hamilton Public Library Donations, Sponsorship and Fundraising Policy
<https://www.hpl.ca/articles/donations-sponsorship-and-fundraising-policy#:~:text=The%20Library%20gratefully%20accepts%20donations,aside%20in%20a%20Donations%20Reserve.>
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- Amended Dates: November 23, 2023