



## FUNDRAISING POLICY

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## 1. Introduction

The Strathroy Middlesex General Hospital Foundation (the “Foundation or SMGHF”) is committed to raising funds ethically, responsibly, and transparently to support the mission and objectives of the organization. This Fundraising Policy outlines the principles and guidelines governing the Foundation’s fundraising efforts, ensuring compliance with applicable laws, safeguarding donor trust, and maximizing the impact of donor contributions.

## 2. Purpose and Application

### 2.1. Purpose

This Policy aims to guide the Foundation’s staff and volunteers in their execution of fundraising programs and activities. This Policy will additionally guarantee that the Foundation’s fundraising initiatives and operations are carried out with utmost integrity, adhering to the guidelines set forth under the Donor Bill of Rights, Imagine Canada’s Ethical Code and Accreditation Standards Program, the SMGHF Code of Conduct and Ethics<sup>1</sup> and other relevant legislative mandates.

### 2.2. Application

This Policy is applicable to the Board of Directors, Board’s Committee members, officers, employees/contract staff, and volunteers of the Foundation. The Policy shall be implemented through the Governance Committee and in accordance with the SMGHF Code of Conduct and Ethics.

## 3. Guiding Principles

The Board of Directors, Officers, staff, volunteer or third-party work for, or are contracted by the Foundation and collect or accept funds on its behalf are required to:

- a. act with equity, honesty, and in compliance with all relevant legislation;
- b. cease any solicitation of a potential donor who expresses disinterest, harassment, or undue influence or who explicitly declines to be contacted;
- c. Immediately notify the Foundation of any tangible or perceived conflicts of interest<sup>2</sup> or loyalty;
- d. Refrain from accepting donations for objectives that are contrary to the organization’s objective.

## 4. Fundraising Practices

### 4.1. Donor Privacy and Confidentiality

The Foundation recognizes the importance of donor privacy and will handle all donor information with the utmost confidentiality. Personal information will only be used for the purposes for which it was provided, and consent will be obtained as required by law. Donors will have the opportunity to opt out of any future

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<sup>1</sup> Refer SMGHF Code of Conduct and Ethics

<sup>2</sup> Refer SMGHF Conflict of Interest Policy

communications. SMGHF does not engage in the sale, exchange, or dissemination of its donor lists.

#### 4.2. Honest and Transparent Communication

The Foundation will provide donors and potential donors with accurate and truthful information about its mission, programs, and the impact of their contributions. Upon request, provide information regarding the status of the individual or entity soliciting donations, specifically whether they are a volunteer, employee, or contracted third party.

#### 4.3. Avoidance of Misrepresentation

The Foundation will refrain from making false or misleading statements, either orally or in writing, about its programs, services, or the benefits received by donors.

#### 4.4. Respect for Donor Intent

Donor contributions will be utilized for the intended purposes specified by the donor. When restrictions cannot be honoured, the Foundation will seek approval from the donor or provide alternative suggestions for the use of funds.

#### 4.5. Professional Conduct

Foundation staff, volunteers, and representatives will conduct themselves in a professional, respectful, and courteous manner when engaging with donors, ensuring donor satisfaction and positive relationships.

#### 4.6. Diverse and Non-Discriminatory Fundraising

The Foundation is committed to fostering a culture of inclusivity and will ensure that its fundraising efforts are non-discriminatory and respectful of all individuals, regardless of their race, religion, ethnicity, gender, sexual orientation, or disability.

#### 4.7. Gift Acceptance and Acknowledgement

The Foundation will acknowledge all donations, providing a receipt and expressing gratitude for the donor's support. Donors will be informed of any tax implications associated with their contributions and provided with appropriate documentation needed for tax purposes.

#### 4.8. Independent Advice

The Foundation advises donors to obtain independent advice in the event that the intended donation is a planned gift and/or if there is any indication that the donation could have a substantial impact on the donor's financial status, taxable income, or relationships with other family members.

#### 4.9. Fundraising Costs and Transparency

The Foundation will strive to maintain reasonable fundraising costs while ensuring effective fundraising practices.

The Foundation will provide transparent disclosure of its fundraising and administrative expenses, enabling donors to make informed decisions regarding their support.

In order to exhibit accountability and transparency, SMGHF makes a range of organizational information available on its website. Our audited financial statements, annual reports, charity information filed with CRA, list of board of directors, complaints policy, privacy policy, and other relevant policies are available on our website.

#### 4.10. Compliance with Laws and Regulations

The Foundation will adhere to all relevant federal, provincial, and local laws and regulations governing fundraising activities. This includes but is not limited to privacy laws, charitable solicitation guidelines, and regulations related to tax-exempt status.

### 5. Advice from Legal Counsel

SMGHF is dedicated to fulfilling all of its legal and regulatory responsibilities. It also has the authority to independently determine these obligations and take any necessary actions regarding gifts or donations in order to comply with legal or regulatory requirements. SMGHF will consult with legal experts to obtain guidance on accepting gifts when it is deemed necessary. It is advisable to seek the advice of a legal expert in the following situations:

- a. transactions that may involve a conflict of interest.
- b. gifts that impose unusual or exceptional obligations on the Foundation.
- c. any other circumstances where the chairperson or CEO of the Foundation deems it appropriate to consult legal counsel.

### 6. Review and Monitoring

The Foundation will periodically assess its fundraising activities to measure effectiveness and identify areas for improvement. This Fundraising Policy will be regularly reviewed, and any necessary updates or amendments will be made to ensure its alignment with legal requirements, best practices, and the evolving needs of the Foundation.