



**The City of Kawartha Lakes
Public Library**

Policy Number: LIB2016-16

Policy Name: Donations, Sponsorships and Fundraising Policy
--

Developed By:	David Harvie, CEO	Date:	18 Mar 2016
		Adoption Date:	7 April 2016
Resolution #:	LIB2016-16	Effective:	7 April 2016
Review Cycle:	Once per Term	Last Reviewed Date:	

POLICY STATEMENT AND RATIONALE:

The purpose of this policy is to provide guidelines with respect to the acceptance of donations and the creation and administration of donations, sponsorship partnerships and fundraising campaigns.

SCOPE:

This policy shall apply to all Library Staff, Members of the Library Board and all residents, businesses and organizations seeking to assist the Library through the provision of donations, gifts and the creation of sponsorship partnerships.

DEFINITIONS:

In reading and interpreting this policy, the following definitions shall apply:

“CEO” means the Chief Executive Officer of the City of Kawartha Lakes Public Library.

“Campaign” means an organized fundraising effort to solicit substantial funds for the City of Kawartha Lakes Public Library, usually extending over a period of months or years.

“City” means the Corporation of the City of Kawartha Lakes.

“Donation” means a gift or contribution of cash, goods or services given voluntarily toward an event, project, program or corporate asset as a philanthropic act without the expectation that any benefit will accrue to the donor, for which a Charitable Tax Credit can be issued. Contributions of skills or time through volunteer service do not qualify as donations, as they are not recognized as such in the Canadian Income Tax Act.

“Donor” is an individual or an organization that has made a gift to the City of Kawartha Lakes Public Library.

“Fundraising Activities” mean short-term activities or single events to solicit funds.

“Gift” means a voluntary transfer of property, without consideration.

“Library” means the City of Kawartha Lakes Public Library.

“Library Board” means the City of Kawartha Lakes Public Library Board.

“Library Staff” means all staff employed by the City of Kawartha Lakes Public Library Board.

“Pledge” means a commitment of a gift, given over a specific pre-determined time frame.

“Sponsorship” means a contribution of cash, goods or services toward an event, project, program or corporate asset, in return for commercial benefit (i.e. logo placement or presenting sponsorship). The funds typically emanate from the sponsor’s marketing, advertising or communication budgets.

Sponsorships are a reciprocal arrangement benefitting both parties. Usually the cost to the sponsor is categorized as a business expense for which a Business Tax Receipt can be issued.

POLICY, PROCEDURE AND IMPLEMENTATION:

1.0 General Guidelines

- 1.1 The Library Board gratefully accepts and encourages donations, gifts and sponsorships from individuals, groups, foundations and corporations, for the purpose of enhancing library services, subject to this policy. The Library actively solicits and encourages the business community, service clubs and other organizations to become donors and/or sponsors of Library events, programmes and services, which will benefit the community by allowing the Library to increase the level it can provide to the residents.
- 1.2 The Library evaluates all donations/sponsorships and accept only those which it feels align with the mission, values and standards of the library.
- 1.3 The Library is committed to the highest ethical standards of philanthropy, financial accountability and development practice as articulated in the *Donor Bill of Rights*.
- 1.4 Donations will become the exclusive property of the Library and must be clear and unencumbered when given. The Library may accept conditions of the use and/or disposition of donations only where it deems the proposed conditions to be reasonable and feasible.
- 1.5 While honouring the wishes of donors as appropriate, the Library has no obligation to inform the donor regarding the investment, disposition and disposal of donations.

2.0 Donations

2.1 Types of Donations

The Library accepts the following types of contributions:

- Money
- Books, manuscripts and other printed materials
- Audio visual materials
- Art and photographic works of archival or historical significance
- Equipment

- Toys
- Other in-kind gifts or services
- Property of significant value, such as real estate or securities
- Planned gifts, such as willed donations, bequests or endowments.

The Library will not accept:

- Magazines, including *National Geographic*
- Textbooks
- Encyclopaedias
- Video Tapes
- CD-ROMs
- Unlicensed copies
- Most computer books
- Materials in poor condition
- Other items as determined by the Library

Some donated materials may be provided to the Friends of the Library for their book sales or events.

3.0 Sponsorships and Partnerships

- 3.1 The Library negotiates partnerships with, and accepts support from, the business community in ways that will benefit and recognize the supporting companies while enabling the Library to better achieve its mission without compromising its principles. The Library recognizes that companies support the Library not only out of a desire to be good community members, but also with the hope of a return or benefit to the company.
- 3.2 The Library will not accept any cash, gift of property, pledge of support or non-cash gift or services, or enter into any partnership with any company or other organization that produces goods or services that may be considered harmful or illegal for certain members of the community.
- 3.3 The Library will not accept any kind of support from any company or organization that, in the judgement of the Library, exploits certain members of the community in its product lines, advertising, marketing, and workforce or in any other way.
- 3.4 The Library Board will consider donations of cash, material or goods, and/or sponsorship from companies, organizations or agencies, recognized as producing and/or distributing beer, wine or alcohol products. Sponsorships and donations from such companies, organizations or agencies may be accepted by the Library. In such cases, advertising by these companies will promote responsible consumption of the product. Groups and individuals recognized as producing and/or distributing beer, wine and or alcohol products may not contribute to services provided exclusively for children, youth and/or teens.
- 3.5 The Library at all times maintains an independent position on issues and concerns.
- 3.6 The Library does not accept any support that implies or requires endorsements of products.

- 3.7 The Sponsor must not have any impact on the policies, practices and priorities of the Library.
- 3.8 The Sponsor must not have any impact on collection development or Library Staff recommendations about library materials.
- 3.9 Acceptance of corporation support will take the form of a written agreement signed by representatives of the sponsoring organization and Library Board. The agreement will define the terms of the sponsorship, including the nature and extent of the exclusivity, and the time frame over which the exclusivity is to be granted, and any recognition to be provided to the sponsor.
- 3.10 Sponsorship agreements will neither give unfair advantage to nor cause discrimination against any sector(s) of the community.
- 3.11 Any public use of the name and logo of the Library must be approved by the CEO.
- 3.12 The Library Board reserves the right to terminate an existing sponsorship should conditions arise during the life of the sponsorship that result in conflicting with this policy or that sponsorship no longer supports the best interests of the library.
- 3.13 The right to refuse and/or terminate corporate contributions extends to support of third party fundraising for which the proceeds are designated to benefit the Library.
- 3.14 The Library Board endorses the Canadian Library Association's *Position Statement: Corporate Sponsorship agreement in Libraries* as approved June 1997.

4.0 Recognition

4.1 Gift Recognition

- 4.1.1 The Library will recognize all donations and extend thanks to all donors for their generosity.

Wherever possible:

- a) Gifts of greater than \$25.00 and under \$500.00 will be personally acknowledged by the CEO; and,
 - b) Gifts of over \$500.00 will be personally acknowledged by the Board Chair.
- 4.1.2 Official tax receipts will be issued by the City for all qualifying donations in accordance with the Canadian Revenue Agency regulations for donations and/or sponsorships valued at \$25.00 and over.
 - 4.1.3 All donations will be listed in the Library's Annual Report and other library publications.
 - 4.1.4 In cases where the donor wishes requests no public acknowledgement, the Library will honour their request subject to any disclosure that may be required pursuant to the Municipal Freedom of Information and Protection of Privacy Act.

4.2 Sponsorship Recognition

- 4.2.1 Recognition for major corporate support will be developed in cooperation with the corporate donors and will be consistent with the level of support and the Library's mission and purpose and will be meaningful for both the supporting companies and the Library.
- 4.2.2 The Library's intangible intellectual assets, including its name and likeness, will be protected at all times. Corporate partners will not be permitted to use the Library's name for commercial purposes or in connection with the promotion of any product.
- 4.2.3 Official receipts for tax purposes will be issued appropriately and according to Canadian Revenue Agency guidelines.

5.0 Naming Rights

- 5.1 From time to time the library will offer the opportunity for significant philanthropic investment in the library infrastructure to ensure the sustainability of excellent library service in the community. The Library Board has the authority to recognize significant contributions by naming library services or facilities in honour of benefactors.
- 5.2 Name opportunities are subject to funding agreements that satisfy specific donation levels deemed appropriate to the project costs and arrangement of payment.
- 5.3 The Library Board reserves the right to remove a donor's name should that individual or organization fail to exemplify the attributes of integrity and civic leadership expected of this honour.

6.0 Fundraising

- 6.1 The Library Board may choose to strike a fundraising committee that will create a fundraising plan for individual fundraising activities or capital campaigns.
- 6.2 The CEO will develop and implement appropriate fundraising strategies to achieve fundraising targets established by the Board, while maintaining awareness and respect for fundraising endeavours undertaken by others within the community.

Related Documents:

Association of Fundraising Professionals – *The Donor Bill of Rights*

Canadian Library Association – *Corporate Sponsorship Agreements in Libraries Position Statement*

City of Kawartha Lakes Public Library Mission Statement

City of Kawartha Lakes Public Library - Collection Development Policy

Canadian Library Association

Position Statements

Corporate Sponsorship Agreement in Libraries

Approved by Executive Council ~ June 21, 1997

Libraries enrich lives, provide information needed for work and daily living, and foster informed communities which are essential to a democratic society. In recognition of this important function, communities support libraries through public funding. The library's first priority is to ensure the continuation and growth of this primary relationship – public funding for the public good.

CLA encourages and supports advocacy to maintain and develop public funding as the principal source of support for public, school, academic and government libraries.

Publicly funded libraries can and do explore other sources of funding, such as grants, gifts, donations, partnerships and sponsorships, to ensure that they provide the best possible services to their communities. Corporate sponsorships are one source of additional support that allows libraries to enhance the level, extend the range, or improve the quality of library service.

To ensure that partnerships enhance the libraries image and add value to library services, libraries need to develop policies and sponsorship agreements that outline the conditions and the benefits of the sponsorship arrangement.

CLA believes that the following principles are important in developing sponsorship policies and agreements. Libraries have a responsibility to:

1. Demonstrate that sponsors further the library's mission, goals, objectives and priorities, but do not drive the library's agenda or priorities.
2. Safeguard equity of access to library services and not allow sponsorship agreements to give unfair advantage to, or cause discrimination against, sectors of the community.
3. Protect the principle of intellectual freedom and not permit sponsors to influence the selection of materials, nor require endorsement of products or services.
4. Ensure the confidentiality of user records by not selling or providing access to library records.
5. Be sensitive to the local political and social climate and select partners who will enhance the library's image in the community.