Draft Gift Acceptance Policy

Policy # 2. Presented to the board 20 June 2023. Due for review 20 June 2025

Ottawa Riverkeeper is a registered Canadian charity with a focus on protecting and promoting the ecological health of the river and watershed. We operate independently, focusing on local water issues and serving communities across the watershed.

Ottawa Riverkeeper relies on generous financial support from individuals, foundations, governments, and businesses whose contributions fund our work. All donations, small-to-large, help us work towards our vision of a clean and healthy river system.

At Ottawa Riverkeeper we are committed to managing our funds responsibly, reporting our financial affairs accurately and completely and to being accountable to our donors and funders. Independence and integrity in the eyes of the public is critical to maintaining our effectiveness. This Gift Acceptance Policy is intended to provide guidance to the board of directors and staff on which gifts can be accepted and how they should be handled. It will guide us in making sound decisions with respect to accepting gifts, avoid real and perceived conflicts of interest, help ensure the preservation of our values and identity as an organization and provide information for potential donors interested in supporting our work.

This policy will be posted online and made available to donors.

If you have any questions about our fundraising and gift acceptance policy, please contact the Director of Philanthropy.

1. General Gift Acceptance Principles

a. Ottawa Riverkeeper accepts donations that support our mission and align with our values.
b. Acceptance of any contribution, gift or grant is at the discretion of Ottawa Riverkeeper.
c. Accepting a gift is not a sign that Ottawa Riverkeeper endorses a donor, organization, or viewpoint.
d. We reserve the right to decline or return any donation that does not align with our mission, could harm our reputation, or places the organization under undue burden or pressure.

e. We are committed to transparency and will provide clear, honest, and open communication with donors.
f. All gifts will be received in strict compliance with the provisions of the Income Tax Act and with the regulations and rules as issued by the Canada Revenue Agency (CRA).
g. Ottawa Riverkeeper will accept donations of:
    i. **Cash** (i.e. gifts received in cash, cheques, credit cards, electronic fund transfers and payroll deductions)
    ii. **Publicly traded securities** (i.e. shares, bonds, mutual funds) For gifts of publicly traded securities, Ottawa Riverkeeper will receive these gifts through our fund established with the Ottawa Community Foundation. A receipt will be issued for the donation amount which is the value of the securities at the close of business on the day the securities are received in the Foundation's account.
    iii. **Gifts in Kind** (i.e. tangible assets or goods) - must be reviewed prior to acceptance.
    iv. **Bequests** (gifts made via estate plan or will)
    v. **Gifts of in-kind of Services** will be accepted at the discretion of Ottawa Riverkeeper. While a tax receipt cannot be issued for services received, a cheque exchange may be approved by the Ottawa Riverkeeper/CEO, or as such can be delegated by this person to senior positions within the staff team such as the Director of Philanthropy. A cheque exchange involves the donor providing Ottawa Riverkeeper an invoice for services rendered, Ottawa Riverkeeper then pays the invoice and later accepts the voluntary return of all, or part of, the payment as a donation. Ottawa Riverkeeper can issue an official receipt for the amount donated.

2. Donation Evaluation Criteria*

a. The potential donor's overall commitment to environmental sustainability. This includes their policies, practices, and reputation in the community.
b. The potential donor's willingness to engage in dialogue with Ottawa Riverkeeper about their environmental practices. This includes opportunities for Ottawa Riverkeeper to influence the donor's environmental practices.
c. The potential positive impacts of the donation on our mission.
d. The potential negative impacts of the donation on our mission.
e. The potential donor's compliance with all relevant laws and regulations, including those related to environmental protection.

*Applies to all gifts valued at $100,000 or more and/or where there is or could be a perceived conflict of interest.

3. Donation Review Process

a. The Riverkeeper/CEO, Director of Philanthropy and board Executive Committee will review any potential donations of $100,000 or more to determine if the donation should

be accepted. The Committee will strive for consensus in its decision-making process. If a unanimous decision cannot be reached, the matter will be referred to the Board of Directors for final resolution.

b. All decisions will be considered to be effective immediately.
c. Any decision to accept a donation of $100,000 or more will be communicated to the board by the Ottawa Riverkeeper/CEO.
d. **Ottawa Riverkeeper will not accept gifts that:**
    i. Pose potential conflicts of interest, undermine our integrity or damage the reputation or ongoing work of the organization;
    ii. Could result in Ottawa Riverkeeper losing its status as a registered charitable organization;
    iii. Are too difficult or too expensive to administer in relation to their value;
    iv. Are given on the condition that the donor will influence Ottawa Riverkeeper's strategic decisions or programs.

4. Donor Rights and Responsibilities

a. Ottawa Riverkeeper has adopted the principles of ethical fundraising and donor rights as set forth by the Association of Fundraising Professionals (AFP) as its basis for all donor relationships. The full text of the Donor Bill of Rights is available on the AFP website. As such, Ottawa Riverkeeper board and staff pledge to conduct all business with donors and sponsors with professionalism, transparency and honesty.
b. Ottawa Riverkeeper will refrain from providing advice about the tax or other treatment of gifts and will encourage donors to seek guidance from their own professional advisors to assist them in the process of making their gift.

5. Restricted and Anonymous Gifts

a. Decisions on the restrictive nature of a gift, and its acceptance or refusal, shall be made by the senior management team, in consultation with the board Executive Committee. Any restrictions on a gift must be deemed acceptable by both the donor and Ottawa Riverkeeper.
b. Ottawa Riverkeeper will respect the intent of the donor relating to gifts for restricted purposes and those relating to the desire to remain anonymous. With respect to anonymous gifts, Ottawa Riverkeeper will restrict information about the donor to only those staff and/or board members with a need to know.
c. It is a fundamental policy that donor instructions or restrictions to a charitable gift, once accepted by the organization, will be honoured.

6. Updates to this policy

a. This gift-acceptance policy will be reviewed at least once every two years by our board Executive Committee to ensure that it continues to meet the needs of Ottawa Riverkeeper and remains consistent with our mission.