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**MARKETING AND DEVELOPMENT – DONATIONS, SPONSORSHIP, NAMING RIGHTS AND THIRD PARTY FUNDRAISING**

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**DONATIONS POLICY**

The Oakville Public Library (hereinafter referred to as "the Library") welcomes and encourages gifts from individuals, groups, foundations and corporations, for the purpose of enhancing the services that the library provides for the citizens of the Town of Oakville.

**Definition**

The Canada Revenue Agency (hereinafter referred to as "CRA") defines a gift or donation as a voluntary transfer of property made without the expectation that any benefit will accrue to the donor or anyone designated by the donor. The scope of this policy includes gifts of:

1. Money
2. Gifts-in-kind
3. Property of significant value, such as real estate or securities
4. Planned gifts, such as willed donations, bequests or endowments

**Regulation**

The Library follows all rules and regulations of the CRA.

**Donation Acceptance**

The Library will only accept donations in accordance with CRA regulations and which they feel will cost-effectively fit the mission and objectives of the Library. Please also refer to the Library's Public Service Manual for more information on acceptable donations for print and audio visual materials for our collection and sales.

Where applicable, the Library may require the donor to have his/her property appraised at his/her expense before the Library will make a decision as to whether or not to accept the donor's property as a donation.

The Library reserves the right to use the donation in the best interest of the Library, and shall make decisions regarding the investment, disposition and/or eventual disposal of all donations.

Donations become the exclusive property of the Library and must be of a clear and unencumbered nature.

**Donor Records**

The Library shall maintain donor records in accordance with CRA regulations, the contents of which shall remain confidential unless the donor agrees otherwise.

**Official Receipts**

The Library issues tax receipts for donations greater than \$25.00. Receipts in accordance with CRA regulations.

**Donor Recognition**

No donor shall be recognized, either internally or publicly, without his/her consent.

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### SPONSORSHIP POLICY

The Library actively solicits and encourages the business community, service clubs and other organizations to become sponsors of Library events, programs and services, which will benefit the community by allowing the Library to increase the level of service it can provide to the citizens of Oakville.

#### Scope

A sponsorship is defined as a mutually beneficial exchange, whereby the sponsor receives a benefit in return for providing cash and/or products and services in kind to the Library.

#### Conditions of Sponsorship Acceptance

1. The Library reserves the right to refuse any sponsorship opportunity, which is deemed to be inappropriate or unsuitable to the advancement of the mission and objectives of the Library.
2. The Library will not entertain sponsorship opportunities with companies or organizations involved with the following products or activities:
  - Promote consumption of alcohol and other addictive substances, at events or venues geared primarily to children
  - Promote the sale of tobacco
  - Promote pornography
  - Promote the support of our involvement in the productions distribution and sale of weapons and other life threatening products
  - Present demeaning or derogatory portrayals of individuals or groups or contain any message that is likely to cause deep or widespread offence
  - Promote religious or political messages that might be deemed prejudicial to other religious or political groups
3. The sponsor must have no impact on the policies and practices of the Library, such as on materials selection or purchasing.
4. Where a sponsorship agreement limits the Library's ability to enter into other sponsorships, such an agreement shall clearly define the nature and extent of the exclusivity, and the time frame over which the exclusivity is to be granted.
5. Sponsorships do not imply endorsement of products by the Library.
6. Any public use of the name and/or logo of the Library, and other affiliated organizations, branches, special collections, resource collections, special services, programs, and departments, must be approved by the CEO and/or Director, Community Engagement.
7. Sponsorships cannot be made conditional on Library performance outcomes.

#### Sponsorship Agreements

1. Sponsorship agreements of \$5,000 or more must be confirmed by a written Sponsorship Agreement signed by both parties. Sponsorship Agreements will outline the benefits, roles

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and responsibilities, fees, duration, recognition opportunities, termination reasons and other agreed terms of the sponsorship arrangement.

2. Sponsorship agreements, which are valued at \$25,000 or less, may be approved by the CEO or Director, Community Engagement and reported to the OPL Board at its next meeting.
3. Sponsorship agreements with values in excess of \$25,000 shall be approved by the Board.

Official tax receipts will not be issued to sponsors for their contribution to the Library in accordance with CRA regulations.

**Naming Rights**

As Library Facilities are owned by the Town of Oakville, the OPL will adapt the Naming Rights Procedure A-GEN-001-003. (as attached)

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### THIRD PARTY FUNDRAISING POLICY

The Library welcomes and encourages fundraising efforts by corporations, organizations, citizen groups, and individuals where it feels that they fit the Library's mission and objectives. In order to co-ordinate a variety of fundraising efforts and avoid duplication, the CEO and/or Director, Community Engagement must be informed of all proposed fundraising initiatives over \$5,000 and/or fit the following criteria:

- That will require the use of Library resources, including staff time, rooms, equipment and images that belong to the Library; and/or
- That will be targeted at an audience outside the existing membership of the group that wishes to undertake the project.

#### Approval of Fundraising Projects

The Library may approve fundraising ventures which it deems suitable in fulfilling its mission, goals and objectives, and which will not compromise the Library's public image.

To secure Library endorsement, individuals or groups who wish to initiate a fundraising project for or on behalf of the Library must present a fundraising plan to the CEO and/or Director, Community Engagement.

#### Conditions of Approval

The CEO and/or Director, Community Engagement, must be consulted in advance prior to issuance of all materials, merchandise, and/or publicity produced in conjunction with the campaign.

The CEO and/or Director, Community Engagement, must also approve the use of any Library resources, including staff time, which is required by the group to implement the campaign.

The Library is not responsible for the costs of fundraising or for shortfalls in campaign goals.

Effective Date: April 27, 2018	Approved OPL Board:	Next Review Date: 2022
Supersedes Policy Dated: November 28, 2013, June 28, 2007, January 2002, April 25, 1996	Motion#:13.11.112,07.06.68 , 02.03.32, 96.24	<i>Page 4 of 4</i>
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