

Supplementary Fund Raising Policy

I Introduction

United Way Cape Breton is committed to the responsibility of raising funds through a public campaign on behalf of funded programs. The purpose of this policy is to provide organizations with opportunities to raise funds, at the same time protecting United Way donors from multiple canvassing. This policy is intended to cover all direct or indirect fundraising activities conducted by agencies or by other organizations on behalf of agencies.

II Capital Campaign

United Way Cape Breton does not generally provide for major capital items. However, on those occasions when approval is given it is subject to the following guidelines:

- a) a capital campaign must have a designated purpose and should not be held on a recurring or annual basis;
- b) proposals must be submitted 60 days in advance of initiating project and contain a clearly stated financial objective;
- c) capital campaign should not be held during campaign period;
- d) all direct solicitations, to any business or corporation must be approved by United Way Cape Breton;
- e) approval of a capital project does not commit United Way Cape Breton, to provide additional annual operating funds.

III Permitted Activities

The following activities are not considered to be supplementary fund raising and agencies are encouraged to raise funds in the following areas, which do not require prior United Way Cape Breton approval.

- a) unsolicited gifts from churches and service clubs;
- b) gifts from independent foundations;
- c) funds from different government levels;
- d) gifts by will, endowment and similar individual deferred gifts;



- e) earned income;
- f) passing fundraising (coin boxes, etc., at specific locations);
- g) unsolicited donations;
- h) sale of goods and services

IV Additional Fundraisers

Agencies wishing to hold items under this category must submit details to United Way Cape Breton for approval, 60 days in advance of initiating project. This would include approaches to a corporation for a specific gift. Subject to Board approval, special events may be permitted during the campaign period under the following guidelines:

- a) events must promote the fall campaign;
- b) all promotional material, literature and PSA's must identify the organization as receiving funding from United Way Cape Breton and display the United Way Logo;
- c) a limited number of special events may be approved;

V Activities That Are Not Permitted:

- a) no household appeals for funds shall be conducted either by door to door canvassing or by mail,
- b) no appeals for funds which involve corporate request, unless approved by United Way Cape Breton
- c) no solicitation of employees groups will be permitted,

(Exceptions or variations may be permitted provided the agency has written approval from the United Way Board of Directors.)

VI Professional Fundraiser

United Way Cape Breton would like to strongly discourage organizations receiving funding from United Way Cape Breton from using a professional fundraising company. However, if an agency is going to hire the services of a professional fundraiser, then United Way Cape Breton would request the following information 60 days in advance of initiating project.

- a) name and business reputation of the company involved;



- b) accreditation from the Better Business Bureau;
- c) details on the events, target group, and a list of any direct business or corporate solicitation;
- d) agency must provide breakdown of distribution of funds;

VII Breach of Policy

If any funded program commits a breach of this policy:

- a) that funded program may receive a downward adjustment in their annual allocation;
- b) there will be a review of the funding policy of the offending funded program by United Way Cape Breton and a decision by the Board could result in the discontinuation of United Way Cape Breton funding.