



Fundraising Policies

November 2017

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| Fund Development Policy | Date approved: |
| 1. Introduction | Date approved: |

PURPOSE

Funding is required to support the mission of the Society. Fundraising for Alberta charities is governed by both federal and provincial regulations. Knowledge of these regulations is essential to compliance. Since the Society's existence relies on financial support of the community, public trust is vital to our mission. The key to gaining and maintaining public trust is transparency and accountability on how our business is conducted and how donations are handled. These policies have been developed to specify guiding principles to influence and determine the decisions and actions of the Society with respect to fundraising.

Volunteers, staff or third parties who solicit or receive funds on behalf of the organization must:

- EHS encourages the practice in line with most current “Code of Ethical Standards” enforced by the, Association of Fundraising Professionals (see code in appendix)
- Understand and protect the “Donor Bill of Rights” enforced by the, Association of Fundraising Professionals (see code in appendix)
- Fundraise with fairness, integrity and in accordance with all applicable laws
- Cease solicitation of a prospective donor who identifies the solicitation as harassment or undue pressure, or who states that he/she does not wish to be solicited;
- Disclose immediately to Edmonton Humane Society any actual or apparent conflict of interest or loyalty (Personal relationships, family members)
- Not accept donations for purposes that are inconsistent with the organization's mission

SCOPE

This policy applies to all EHS employees, management, contractors, student interns, and volunteers. This policy describes the objectives and policies regarding maintaining the trust of those who make donations of time, money, or any other resources used in its mission.

Wherever possible, EHS strives to meet or exceed the standards set by leaders in the fundraising field such as Imagine Canada and the Association of Fundraising Professionals.

REFERENCES

- a. Canada Revenue Website - Policies and Guidance about operating a registered charity
<http://www.cra-arc.gc.ca/chrts-gvng/chrts/plcy/prtng-eng.html>
- b. Province of Alberta Website –
<https://www.servicealberta.ca/491.cfm>
- c. Imagine Canada Fundraising Policies, August 2012
http://www.imaginecanada.ca/sites/default/files/www/en/ethicalcode/ec_handbook_2011_en.pdf
- d. Developing Fundraising Policies and Procedures, Barbara L. Ciconte, CFRE, Association of Fundraising Professionals
<http://www.afpnet.org/files/contentdocuments/9%20developing%20fundraising%20policies%20and%20procedures.pdf>

APPENDICES

- a. Alberta Standards of Practice for Charitable Organizations
- b. Donor Bill of Rights
- c. Code of Ethical Standards
- d. Sample Gift Agreement
- e. EHS Stewardship Grid

Definition

"Arm's Length." *Merriam-Webster.com*. Merriam-Webster, n.d. Web. 19 Aug. 2017.

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| Fund Development Policy | Date approved: |
| 2. Ethical Fundraising | Review Date: |

SOLICITATIONS

All fundraising solicitations by or on behalf of Edmonton Humane Society (EHS) must:

- Be truthful
- Accurately describe the organization's activities
- Disclose the organization's name
- Disclose the purpose for which funds are requested
- Disclose, upon request, whether the individual or entity soliciting donations is a volunteer, employee, or contracted third party.
- Disclose the cost of fund-raising and how much is expected to be raised
- Provide address and contact information of EHS representative

TREATMENT OF DONOR INFORMATION

EHS honours donors and prospective donors requests to:

- Limit the frequency of solicitations
- Not be solicited by telephone or other technology;
- Receive printed material concerning the organization
- Discontinue solicitations where it is indicated they are unwanted or a nuisance.

PRIVACY

EHS respects the privacy of donors. Donor records are kept confidential to the greatest extent possible. All staff and volunteers with access to donor records are required to sign confidentiality agreements. Donors have the right to see their own donor record and to challenge its accuracy. EHS does not sell, rent, exchange, or otherwise share its donor list.

TRANSPARENCY

To demonstrate transparency and accountability, EHS posts a variety of information on our website, including our audited financial statements, annual reports, Registered Charity Information Number, members of our Board of Directors, complaints policy and privacy policy.

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| Fund Development Policy | Date approved: |
| 3. Gift Acceptance Policies | Review Date: |

In keeping with the values and goals of EHS and in accordance with Canada Revenue Agency policy related to charitable giving, the purpose of these Gift Acceptance policies is to:

- Guarantee that all donors are treated fairly and equitably
- Avoid misunderstandings concerning the kinds of gifts that can be accepted by EHS
- Ensure that, where tax liability and/or estate consequences are a factor, potential donors are advised to contact their legal and/or tax counselors
- Summarize the general policies applicable to all charitable gifts to the EHS
- Identify various means of charitable giving and the specific guidelines related to acceptance of each type of gift.

GIFT DEFINITION

"A gift is a voluntary transfer of property for which the donor receives no benefit in return" (Canada Revenue Agency). Donors to registered charities – EHS included - are eligible for a charitable tax receipt that may be claimed as a non-refundable tax credit on an income tax return.

No benefit of any kind may be provided to the donor or to anyone designated by the donor except where the benefit is of nominal value. Canada Revenue Agency defines nominal value as a fair market value of less than the lesser of \$0 or 10% of the amount of the gift. It is permissible and encouraged for donors to receive recognition for their gift, including honor rolls, signage and plaques, or naming opportunities for rooms, displays, or programs.

QUID PRO QUO

If EHS provides something of value in return for a gift (including admission to a fund raising event) the donor's tax receipt is reduced by the fair market value of the benefit received. Fair market value is determined by EHS representatives.

NON GIFTS

The following transactions do not constitute philanthropy and are not eligible for charitable tax receipts:

- A gift of service
- The purchase of an item or service
- Sponsorship of projects for which the donor retains right of property, including intellectual property.

TYPES OF GIFTS

In general, EHS will accept the following types of gifts:

- Outright gifts of cash, securities, or personal property
- Real property

- Charitable gift annuities
- Charitable remainder trusts
- Charitable lead trusts
- Gifts of life insurance policies
- Bequests
- Beneficiary designations
- Public and private securities
- Gifts-in-kind

GIFT DESIGNATION

All gifts, regardless of value, form or designated use, should be made payable to Edmonton Humane Society. Donors may choose to have their gift fully expended or endowed and may direct their gift to a specific program, or project provided that:

- No benefit accrues the donor
- The directed gift does not benefit any person not dealing at **arm's length*
- A decision regarding use of the donation within a program rests with the charity, although, where possible, EHS will act in concert with and be respectful of the donor's wishes.
- On rare occasions, a gift may be declined as a result of the limitations proposed by the donor. See Section 7 for guidelines on declining a gift.

TAX CONSIDERATIONS

In accordance with Canada Revenue Agency, EHS requires the following in regard to official donation receipts:

RECEIPTS

Receipts are only issued for funds that EHS will be responsible for spending and management of charitable receipting rests with EHS. Tax receipts will only be issued for gifts valued at \$10.00 CDN or more. Gifts will be consolidated and receipts mailed to donors annually, in the first quarter of the year for the prior calendar year. Alternatively, donors may request to have their receipts sent individually or consolidated via email. Staff is required to request all the necessary paperwork before issuing a charitable tax receipt. The appropriate paperwork is determined by EHS staff in accordance with required records as stated by CRA. Staff has the responsibility to question further the validity of a charitable gift received by a volunteer on behalf of EHS.

PREPARATION OF TAX RECEIPTS

Each receipt that is prepared, must bear its own serial number, and must be signed by an authorized financial representative of EHS. In instances of donations of property other than cash, the fair market value of the property at the time the gift was made, as well as the date of the gift, a description of the property, and the name and address of the appraiser is required.

** A condition that individuals act independently and without one having undue influence over another*

CONTROL OF TAX RECEIPT

EHS and its employees guard against the unauthorized use of official receipts.

LOST OR SPOILED RECEIPTS

EHS may issue a replacement for an official receipt. The replacement receipt must include a notation confirming it as a replacement for receipt # (serial number of original receipt). EHS must mark the copy of the lost or spoiled receipt as "cancelled."

GIFT ACCEPTANCE

Policy for accepting, processing, acknowledging and receipting gifts to EHS follows:

GIFTS OF CASH

Gifts of "cash" - cash, cheques, money order and credit card - are accepted by EHS

BEQUESTS

A bequest is a provision in a will, directing assets from an estate to EHS. There are several types of bequests accepted:

- A *specific bequest* provides EHS a specific sum of money, stated percentage of an estate, or a specific property such as real estate or securities.
- A *residual bequest* leaves all or a portion of their estate after providing for other beneficiaries.
- A *contingency bequest* ensures that EHS receives all or a share of the estate in the event of the prior death of certain other beneficiaries.
- A *residual bequest subject to life interest* applies when the donor chooses to have EHS receive the bequest following the death of certain other beneficiaries who have use of the assets in the estate for their lifetime.

Bequests are eligible for a charitable tax receipt. EHS always recommends that donors consult a lawyer or estate planner before completing a will and retains the right to decline a gift if the donor did not retain independent counsel.

LIFE INSURANCE

Gifts of life insurance may be contributed to EHS in two ways:

- A donor may donate an existing policy by designating EHS as the beneficiary and owner of the policy. EHS issues a charitable tax receipt for the policy's cash surrender value, including accumulated dividends and interest. If the policy is not yet fully paid-up, the donor will receive tax receipts for any additional premium payments made after the policy is assigned. Upon the donor's death, EHS receives the value of the policy.

- In donating a new policy that names EHS as owner and beneficiary, the donor will receive charitable tax receipts for the full amount of each annual premium. Upon the donor's death, EHS receives the value of the policy.

Donors may also choose to direct the insurance proceeds from an existing or new policy to their estate and to name EHS as the beneficiary of those proceeds in their will.

As per other specific bequests, the donor's estate would receive a charitable tax receipt for the proceeds of the policy.

Life insurance policies owned by the donor and naming EHS as beneficiary or secondary beneficiary are not eligible for a charitable tax receipt. In this instance, the gift is revocable - the designated beneficiary can be changed.

PUBLIC AND PRIVATE SECURITIES

Two types of gifts of securities may be accepted:

A donation of *public securities* traded on a recognized stock exchange and including stocks, bonds, bills and mutual funds. The value of such a gift is determined by the value of trading on the date donated. Donations of public securities may be handled in one of two ways:

Transfer of securities: the donor is asked to open a no obligation, one-time only account with EHS's brokerage firm and to direct, in writing, the internal transfer of the gifted securities to EHS's account.

Presentation of certificate: the donor may mail or deliver endorsed certificates to EHS or EHS's agent. In some instances, the donor's signature requires bank notarization.

Instructions are on the reverse of certificate.

Donors may also contribute *private securities*. The value of the gift and resulting charitable tax receipt is determined by a professional, independent valuation.

GIFTS-IN-KIND

EHS accepts gifts of pet supplies, books, art work, equipment, software, or other property.

Respecting the donor's wishes and EHS's programs plans and needs, EHS may retain the gift or sell it and apply the proceeds in a fitting manner, where possible in consultation with the donor. A charitable tax receipt is issued for all gifts of property for the fair market value at the date of transfer.

CHARITABLE TRUSTS

EHS may accept two types of irrevocable charitable trust arrangements:

(i) A *remainder trust* that pays the donor income from the assets (real estate, securities, cash) for life or for a number of years, and then distributes the principal to EHS.

(ii) A donor contributing a *residual trust* donates an asset (personal residence, work of art, investment property) today, but retains the use of it during his lifetime.

Both remainder and residual trusts are eligible for charitable tax receipts. EHS encourages donors to consult a lawyer or financial advisor before establishing a trust and retains the right to decline a gift not involving professional counsel.

CHARITABLE GIFT ANNUITIES

A gift annuity is an irrevocable transfer of money or other assets. A portion of the principal is used to purchase an annuity from an insurance company. The cost of the annuity is based on the donor's age and income requirements. The remainder other principal is considered an outright gift used for the purpose specified by the donor. The annuity pays the donor a guaranteed income for a specific time or for the remainder of the donor's life. Upon death, EHS receives any remaining guaranteed income from the annuity, unless the donor has specified otherwise.

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| Fund Development Policy | Date approved: |
| 4. Gift acknowledgement, recognition and donor stewardship | Review Date: |

EHS has a Donor Naming and Recognition Program to ensure that gifts to EHS are acknowledged, recognized and stewarded.

DECLINING A GIFT

At times, EHS staff may choose to decline a gift. The following conditions justify such an action, although other situations may also occur:

- If the gift constitutes a non-gift as per Canada Revenue Agency.
- There are unusual features to the gift that are contrary with the objectives, values, and goals of EHS
- The gift could not be fairly assessed and processed prior to calendar year end as per Canada Revenue Agency gift-in-kind guidelines.
- The gift could financially or morally jeopardize the donor and/or EHS
- The gift or terms of the gift are illegal.
- EHS is unable to honour the terms of the gift.
- An appropriate fair market value cannot be determined, or will result in unwarranted or unmanageable expense to EHS.
- There are physical or environmental hazards to EHS in accepting the offered gift.
- The gift involves false promises on the part of either party.
- The gift could jeopardize EHS's charitable status.
- The gift could improperly benefit any individual.

GUIDING PRINCIPLES

STANDARDS OF PRACTICE

All those working on behalf of EHS shall conduct their activities in accordance with acceptable professional standards of accuracy, trust, integrity and good faith.

CONFLICT OF ISSUE

The interests of donors must come before those of EHS. No commitment should be urged upon any donor or prospective donor that would unduly benefit EHS, its employees, consultants, or volunteers at the expense of the donor's interests and welfare

LEGAL CONSIDERATIONS

Prospective planned gift donors, and any other donors when appropriate, will be urged to consult their own legal and financial advisors before arranging and making a complex gift.

Staff members and EHS consultants to the planned giving effort shall not give legal, tax, accounting or other advice to prospective donors but may provide illustrative materials and suggestions for review by donor's counsel.

The advice of legal counsel will be sought in accepting all planned or deferred gifts including but not limited to: bequests, living trust distributions, life insurance, charitable remainder annuity trusts, charitable remainder trusts, charitable gift annuities, charitable lead trusts, gifts of a personal residence or farm with a retained life estate, bank savings accounts held in trust, qualified terminal interest property trusts with charitable remainder and sales of real or personal property.

CONFIDENTIALTY

All information concerning donors (including their names and addresses, the names of beneficiaries, the nature and value of assets given, etc.) must be kept strictly confidential, except for general recognition or where a donor grants written permission to use selective information for purposes of referral, testimonial, recognition or example.

UNDUE INFLUENCE

The role of representatives of EHS is to inform and assist prospective donors. They will exercise extreme caution to avoid pressure and undue influence when dealing with prospective donors.

EHS representatives involved in any planned giving effort are paid a salary, a fixed fee or are volunteers. They are not paid a commission, and under no circumstances do they have a personal financial interest in a gift.

CHANGED CIRCUMSTANCES

If a gift that has been accepted for a specific program or purpose that can no longer be used as originally intended due to a discontinued program or similar circumstance, and the donor does not request the unused portion of the original donation to be returned, the gift will be applied to a program with similar objectives or, if not possible, to the EHS general fund.

GIFT ENTRY AND RECORDING

The timely and accurate recording and acknowledgement of donations is crucial to maintaining good relationships with donors. Procedures for accomplishing this are developed according to the following guidelines.

- All donations received will be documented with the relevant details of the donor's identity, the purpose of the gift, and contact information for acknowledgment purposes.
- The donation will then be given to the Finance Department whose responsibility it is to remove the negotiable items (cash and cheques) to deposit into the bank.
- Documentation for each donation will then be given to the Development Department for entry into the Development database.
- The Fund Development Department will record the gift and issue tax receipts and acknowledgement letters when necessary.

- All gifts should be acknowledged within 4 weeks of receipt of EHS

ACKNOWLEDGEMENT LETTERS

Acknowledgement letters will contain information on how the donation will be used and will be updated on a yearly basis and individualized as much as possible. Procedures are established on which donations will be singled out for acknowledgement by the Chief Executive Officer and Director, Advancement and Social Enterprise.

Acknowledgement of gifts may also be in the form of public recognition either on the donor Wall, naming of a room or program, or publication of the donor's name or logo. Any action required by prior agreement should be initiated and executed according to the terms of the agreement.

Standards of Practice

The Charitable Fund-raising Act

September 2003

This information sheet is intended to provide general information and is not a substitute for legal advice.

In 1999, the Minister established Standards of Practice relating to fund-raising carried out by charitable organizations and fund-raising businesses. Fund-raisers must comply with these eight Standards or the Minister may suspend or cancel their registration or licence.

Principals, directors, and employees of charitable organizations and fund-raising businesses must follow these Standards.

1. Charitable organizations and fund-raising businesses must comply with all relevant municipal, provincial, and federal laws.
2. Charitable organizations and fund-raising businesses must advocate, within the organization, adherence to all applicable laws and Standards of Practice.
3. The principals, directors, managers and employees of charitable organizations and fund-raising businesses that must comply with these Standards must effectively disclose to their organization all conflicts of interest and all situations that might be perceived as a conflict of interest.
4. Charitable organizations and fund-raising businesses must give donors the opportunity to have their names removed from lists that are sold, rented, or exchanged with other organizations.
5. Charitable organizations and fund-raising businesses must not disclose any personal and confidential information about donors or prospective donors outside the work environment, and within the work environment only as appropriate.
6. Charitable organizations must, to the best of their ability, ensure that contributions are used in accordance with donors' intentions and obtain the explicit consent of a donor or the donor's representative before altering conditions of a gift.
7. Charitable organizations must use accurate and consistent accounting methods that conform to the appropriate guidelines adopted by the Canadian Institute of Chartered Accountants (CICA).

**For more
information**

8. Charitable organizations and fund-raising businesses must not take unfair advantage of a donor or prospective donor for their own advantage or benefit.

Forms and instructions for registering a charitable organization and licensing a fund-raising business are available on the Government Services Web site at www.gov.ab.ca/gs.

All inquiries can be directed to:

Alberta Government Services
Consumer Services Branch
Phone: Edmonton (780) 427-4088
Toll-free in Alberta: 1-877-427-4088

A DONOR BILL OF RIGHTS

DEVELOPED BY:



Association of Fundraising Professionals (AFP)



Association for Healthcare Philanthropy (AHP)



Council for Advancement and Support of Education (CASE)



Giving Institute: Leading Consultants to Non-Profits

PHILANTHROPY is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

I

To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.

II

To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.

III

To have access to the organization's most recent financial statements.

IV

To be assured their gifts will be used for the purposes for which they were given.

V

To receive appropriate acknowledgement and recognition.

VI

To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.

VII

To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.

VIII

To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.

IX

To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.

X

To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.



CODE OF ETHICAL STANDARDS

ETHICAL STANDARDS (Adopted 1964; amended Oct 2014)

The Association of Fundraising Professionals believes that ethical behavior fosters the development and growth of fundraising professionals and the fundraising profession and enhances philanthropy and volunteerism. AFP Members recognize their responsibility to ethically generate or support ethical generation of philanthropic support. Violation of the standards may subject the member to disciplinary sanctions as provided in the AFP Ethics Enforcement Procedures. AFP members, both individual and business, agree to abide (and ensure, to the best of their ability, that all members of their staff abide) by the AFP standards.

PUBLIC TRUST, TRANSPARENCY & CONFLICTS OF INTEREST

Members shall:

- 1 not engage in activities that harm the members' organizations, clients or profession or knowingly bring the profession into disrepute.
- 2 not engage in activities that conflict with their fiduciary, ethical and legal obligations to their organizations, clients or profession.
- 3 effectively disclose all potential and actual conflicts of interest; such disclosure does not preclude or imply ethical impropriety.
- 4 not exploit any relationship with a donor, prospect, volunteer, client or employee for the benefit of the members or the members' organizations.
- 5 comply with all applicable local, state, provincial and federal civil and criminal laws.
- 6 recognize their individual boundaries of professional competence.
- 7 present and supply products and/or services honestly and without misrepresentation.
- 8 establish the nature and purpose of any contractual relationship at the outset and be responsive and available to parties before, during and after any sale of materials and/or services.
- 9 never knowingly infringe the intellectual property rights of other parties.
- 10 protect the confidentiality of all privileged information relating to the provider/client relationships.
- 11 never disparage competitors untruthfully.

SOLICITATION & STEWARDSHIP OF PHILANTHROPIC FUNDS

Members shall:

- 12 ensure that all solicitation and communication materials are accurate and correctly reflect their organization's mission and use of solicited funds.
- 13 ensure that donors receive informed, accurate and ethical advice about the value and tax implications of contributions.

- 14 ensure that contributions are used in accordance with donors' intentions.
- 15 ensure proper stewardship of all revenue sources, including timely reports on the use and management of such funds.
- 16 obtain explicit consent by donors before altering the conditions of financial transactions.

TREATMENT OF CONFIDENTIAL & PROPRIETARY INFORMATION

Members shall:

- 17 not disclose privileged or confidential information to unauthorized parties.
- 18 adhere to the principle that all donor and prospect information created by, or on behalf of, an organization or a client is the property of that organization or client.
- 19 give donors and clients the opportunity to have their names removed from lists that are sold to, rented to or exchanged with other organizations.
- 20 when stating fundraising results, use accurate and consistent accounting methods that conform to the relevant guidelines adopted by the appropriate authority.

COMPENSATION, BONUS & FINDER'S FEES

Members shall:

- 21 not accept compensation or enter into a contract that is based on a percentage of contributions; nor shall members accept finder's fees or contingent fees.
- 22 be permitted to accept performance-based compensation, such as bonuses, only if such bonuses are in accord with prevailing practices within the members' own organizations and are not based on a percentage of contributions.
- 23 neither offer nor accept payments or special considerations for the purpose of influencing the selection of products or services.
- 24 not pay finder's fees, commissions or percentage compensation based on contributions.
- 25 meet the legal requirements for the disbursement of funds if they receive funds on behalf of a donor or client.

AGREEMENT BETWEEN

AND

**EDMONTON HUMANE SOCIETY FOR THE PREVENTION OF CRUELTY OF ANIMALS
("EHS")**

Whereas EHS is a registered charity # 119231066 RR001 and authorized by law to solicit, receive, invest and manage sponsorships from community sponsors for the benefit of its charitable purposes; and the Sponsor desires to make an irrevocable naming gift to EHS.

This Agreement shall be governed by and interpreted in accordance with the laws of the Province of Alberta

I. THE SPONSORSHIP

_____ has generously made a contribution pledge of \$_____ to EHS.

This Gift will be provided in the form _____, _____ will make the Gift in instalments as set out in Schedule A of this agreement.

Notwithstanding the foregoing, _____, at any time, may pay more than the amounts identified above on any instalment in order to fulfill the pledge obligation in less time.

The payments shall be made payable to the Edmonton Humane Society.

EHS is responsible for the management of the Gift in accordance with applicable EHS policies. EHS will issue a business receipt/ personal receipt to the Donor for the amount of the Gift in accordance with Canada Revenue Agency guidelines.

Where the Gift is made in instalments, the receipt will be made at the time and for the amount of each instalment payment.

The Edmonton Humane Society enriches the lives of people and companion animals through animal sheltering, programs and services, and community engagement.

II. PURPOSE

The purpose of this Gift is to provide _____ at EHS. The funds will allow us to update _____ and will be used in overall operations. An agreed upon name/logo will be mounted/positioned in our facility, the piece will be in consistent with other EHS recognition plaques. Naming rights to the veterinary hospital at EHS is an exclusive opportunity that provides permanent recognition. Both the _____ and EHS affirm that this gift does not and shall not, in any way, compromise EHS's Mission and Values, contravene any policy of EHS, or reflect negatively on its public image.

III. NAMING DONOR RECOGNITION AND MARKETING

Donors will be acknowledged by EHS in accordance with its practice of acknowledging gifts of this nature. As a Donor, _____ shall be acknowledged as follows:

The Donor will allow for the use of this Name to be displayed with other donors in any public recognition and/or marketing offered by EHS.

IV. COMMUNICATIONS

EHS will report to _____ at mutually agreed upon dates, with respect to how the gift has made an impact on EHS operations. No public announcement concerning this agreement or the participation of the donor, or EHS shall be made without the prior consent and collective approval of all parties.


| | |
|------------------|------------------|
| Donor | EHS |
| Signature: _____ | Signature: _____ |
| Print: _____ | Print: _____ |
| Title: _____ | Title: _____ |
| Date: _____ | Date: _____ |

SCHEDULE A


Sponsorship payment instalment schedule:

| \$ AMOUNT | DATE OF PAYMENT TO BE RECEIVED |
|------------------|---------------------------------------|
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| | |
| | |
| | |
| TOTAL \$ | |

Appendix: Five

|  Corporate (Includes 3rd Party & Foundation) | New Donor | \$1 - \$999 | \$1,000 - \$4999 | \$5000-\$9999 | \$10,000-\$19,999 | \$20,000- \$49,999 | \$50,000- \$99,999 | \$100,000- \$249,999 | \$250,000+ |
|---|-----------|-------------|------------------|---------------|-------------------|--------------------|--------------------|----------------------|--------------|
| Welcome package | | | | | | | | | |
| Thank you letter/ Tax receipt | | | | | | | | | |
| Invitation for Personalized Tour | | | | | | | | | |
| Yearly calendar | | | | | | | Personalized | Personalized | Personalized |
| Personal handwritten thank you card | FD Team | FD Team | FD Team | Director | CEO | CEO | CEO / Board | CEO / Board | CEO / Board |
| Thank you Call | FD Team | FD Team | FD Team | Director | CEO | CEO | CEO / Board | CEO / Board | CEO / Board |
| Naming Opportunity | | \$100+ | | | | | | | |
| Email Graphic ("I Support EHS") | | | | | | | | | |
| Business Stickers ("We Support EHS") | | | | | | | | | |
| Donor appreciation Night | | | | | | | | | |
| Thank you videos | | | | | Stock | Stock | Personalized | Personalized | Personalized |
| Donor wall recognition | | | | Cumulative | Cumulative | Cumulative | Cumulative | Cumulative | Cumulative |
| Invitation to signature event | | | | | | | | | |
| Facebook Post | | | | | | | | | |
| Tweet | | | | | | | | | |
| Instagram | | | | | | | | | |
| Gifts (EHS Merchandise) | | | | | | | | | |
| Christmas Card | | | | | | Cumu. 5yrs | Cumu. 5 yrs | Cumu. 5 yrs | Cumu 5 yrs. |
| Donor Thank you Art (Pet painting) | | | | | | | | | |
| Award nomination | | | | | | | | | |
| Cheque presentation (Pets in the Park) | | | | | | | | | |
| Website mention/Logo | | | | | | | Cumulative | Cumulative | Cumulative |
| Newsletter feature | | | | | | | | | |
| Annual Report Feature | | | | | | | | | |

* Annual Gift, unless specified otherwise

|  Individual | New Donor | \$500- \$999 | \$1,000 - \$4999 | \$5000-\$9999 | \$10,000-\$19,999 | \$20,000- \$49,999 | \$50,000- \$99,999 | \$100,000- \$249,999 | \$250,000+ |
|--|------------------|---------------------|-------------------------|----------------------|--------------------------|---------------------------|---------------------------|-----------------------------|-------------------|
| Welcome package | | | | | | | | | |
| Thank you letter/ Tax receipt | | | | | | | | | |
| Invitation for Personalized Tour | | | | | | | | | |
| Yearly calendar | | | | | | | | | |
| Personal handwritten thank you card | FD Team | | FD Team | Director | CEO | CEO | CEO / Board | CEO / Board | CEO / Board |
| Thank you Call | | | FD Team | Director | CEO | CEO | CEO / Board | CEO / Board | CEO / Board |
| Naming Opportunity | | | | | | | | | |
| Donor appreciation Night | | | Stock | Stock | | | | | |
| Thank you videos | | | | Cumulative | Personalized | Personalized | Personalized | Personalized | Personalized |
| Donor wall recognition | | | | | Cumulative | Cumulative | Cumulative | Cumulative | Cumulative |
| Invitation to signature event | | | | | | | | | |
| Facebook Post | | | | | | | | | |
| Tweet! | | | | | | | | | |
| Instagram | | | | | | | | | |
| Gifts (EHS Merchandise) | | | | | | | | | |
| Christmas Card | | | | | | Cummu. 5yrs | | | |
| Donor Thank you Art (Pet painting) | | | | | | | Cummu. 5 yrs | Cummu. 5 yrs | Cummu 5 yrs. |
| Award nomination | | | | | | | | | |
| Cheque presentation (Pets in the Park) | | | | | | | | | |
| Newsletter feature | | | | | | | | | |
| Annual Report Feature | | | | | | | | | |

* Annual Gift, unless specified otherwise