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**BARRIE PUBLIC LIBRARY  
PLANNED GIVING POLICY**

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**MOTION #09-20**

**Revised June 25, 2009**

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Planned Giving is a philanthropic program by which a donor can arrange a substantial gift to the library for the future. The emphasis is on planning and is focused on matching the objectives of Barrie Public Library with the needs and objectives of the donor.

The Barrie Public Library will encourage donors to make both outright and deferred gifts. The types of deferred gifts to be offered include bequests, gifts of life insurance and such other gift arrangements as the trustees (hereinafter "the Board") may from time to time approve.

All programmes, solicitation plans and activities are subject to Board approval.

The Development Office is authorized to negotiate planned gift arrangements with prospective donors within the program guidelines approved by the Board.

The Barrie Public Library will adhere to planned giving ethical and standard professional practices in encouraging donors to make outright and deferred gifts including bequests, gifts of life insurance and other such gift arrangements approved by the Board.

The Barrie Public Library will issue an official tax receipt for donations that qualify as charitable gifts under the Income Tax Act and Canada Customs and Revenue Agency's interpretation.

Donations will be transferred to a special reserve fund as approved by the Board.

In accepting a donation, bequest or gift, the Board agrees to abide by any conditions, restrictions or designations associated with the gift.

Donations, bequests or gifts must support the goals and objectives of the library.

Motion #01-51	Revised July 05, 2001
Motion #02-45	Reviewed October 10, 2003
Motion #03-38	Revised October 23, 2003
Motion #04-39	Reviewed October 28, 2004
Motion #06-39	Revised November 23, 2006
Motion #09-20	Revised June 25, 2009

All Staff\Policies\Planned Giving