
ONION LAKE EDUCATION TRUST FUND (“OLETF”)

DONATIONS AND SPONSORSHIP POLICY

POLICY T-002-19

Title: Donations, Sponsorship and Fundraising Policy

Definition of Policy: The Onion Lake Education Trust Fund (“OLETF”) welcomes and encourages donations, gifts and sponsorship from individuals, groups, foundations, governments and corporations for the purpose of fulfilling purpose and the mandate of the Trust Fund. The OLETF was established by Onion Lake Chief and Council to assist, recognize and encourage post-secondary students through incentives, scholarships and awards. The OLETF Board of Trustees accepts donations and sponsorships and fundraising opportunities based on this policy.

Key Points Summary:

- » OLETF gratefully accepts donations and welcomes sponsorships and fundraising opportunities with third parties in order to advance its mandate, adhere to its values and meet its strategic goals.
- » Undesignated cash donations are set aside in a Donations Reserve. Use of funds from the Donations Reserve shall be approved only by the Onion Lake Board of Trustees. Designated donations that are specified for particular uses by the donor are identified as such. [An example of a designated donation would be the Leith Wheeler Investment Counsel Scholarships given annually to deserving students by the Board of Trustees].
- » The OLETF Board of Trustees approves the expenditures of these donations consistent with this policy and specifically related to individual scholarship awards.
- » The OLETF Board of Trustees will maintain a donor recognition program in support of its Donations, Sponsorship & Fundraising Program. The purpose of the donor recognition program is to thank donors, to encourage others to give, and to steward healthy long-term relationships between the OLETF and its donors. The OLETF Board of Trustees respects the wishes of donors who wish to remain anonymous.
- » Receipts are issued for cash donations by the Onion Lake Cree Nation on behalf of OLETF. OLETF Board of Trustees is not recognized as a registered charitable organization in Canada.

Definitions:

Cash – Cash includes cheques, money order, bank drafts, and money.

Donation – A donation is a gift contribution of cash, or goods given voluntarily to the OLETF as a philanthropic act without expectation or requirement of reciprocal benefit. A designated donation is one that is to be used for a specific purpose under the OLETF Deed of Trust. A donation is a voluntary transfer of property without value consideration to the donor. The following three conditions must be satisfied:

- Some property, usually cash, is transferred by the donor to the OLETF
- The transfer is voluntary, and
- The transfer is made without expectation of return.

It is permissible for donors to receive recognition for their gift, including naming of scholarships, recognition in annual reports, on OLETF website, brochures and other written and online material.

Donation can be in many forms including cash, gift-in-kind, designated gift, and endowment.

Designated Donation - A donation to the OLETF where the donor has specified the name of the scholarship (ex. Husky Oil Scholarship), program and/or terms and purpose to which the donation is to be directed.

Undesignated Donation - An undesignated donation is one that has no stipulations on use other than being in accordance with the relevant provisions of the OLETF Trust Deed.

Gifts in Kind – Gifts in kind, also known as non-cash gifts, are gifts of property. They cover items such artwork, equipment, securities (stocks & bonds), and other property. A contribution of service, that is, of time, skills or effort, is not property and, therefore, does not qualify as a gift in kind for purposes of issuing donation receipts.

Sponsorship – A sponsorship is a mutually beneficial exchange between the OLETF and outside organizations, in which an external party makes a contribution of cash or in-kind goods or services to the OLETF in return for recognition, acknowledgement or other consideration. OLETF Board of Trustees is pleased to place the name of the donor for a scholarship(s).

OLETF welcomes the opportunity to forge sponsorships that seek to establish a deeper association with corporations, organizations and individuals to further the purpose of OLETF for mutual benefit.

Examples of sponsorship vary widely and the Board of Trustees will consider each one on a case by case basis. Sponsorships will most likely occur with service providers connected to OLETF and or Onion Lake Cree Nation.

Endowment - A restricted designated donation made to the OLETF where the Trust Capital value (cash) is invested, and the annual investment income (Trust Revenue) is used to carry out the purpose established by the Trust Deed. All cash or property gifted to the OLETF for the purpose of an endowment becomes the property of the OLETF. The principle (Trust Capital) of the OLETF is retained, administered, and managed by the OLETF in accordance with its investment policy. Trust Capital is meant to exist in perpetuity.

Gift in Kind - Gifts in kind, also known as non-cash gifts, are gifts of property. Examples of a gift in kind include equipment, software, books, artwork, publicly traded securities, real estate, collections, etc. A contribution of service, that is, of time, skills or efforts, is not property, and therefore does not qualify as a gift or gift in kind.

Overview:

The OLETF is a charitable trust and receives donations from a wide variety of sources including corporations, foundations, governments and individuals.

This procedure outlines activities dealing with assessment of potential donations, approval of donations, and donor acknowledgment.

Authority to establish this policy is authorized by the OLETF Trust Deed - Articles 3, 4.9, 5.1, 5.2 which delegates authority to the Board of Trustees to establish policies and procedures for OLETF management and operation.

Procedures:

Assessment of Potential Donations

Prior to acceptance of any donation, an assessment of the donation will be completed by the OLETF. This acceptance assessment will consider the donation acceptance principles listed in this policy, determine the value of the donation and confirm terms and conditions associated with acceptance of designated donations.

Donations fall into two (2) categories for gift acceptance purposes. These are:

- undesignated donation
- designated donation

All donations or donation offers are to be sent to Board of Trustees for assessment, approval and donor acknowledgment.

UNDESIGNATED DONATION

- OLETF Board of Trustees will assess acceptance of donation

DESIGNATED DONATIONS

- The OLETF Board of Trustees will:
 - ensure that written information regarding the designation of the donation has been received and understood.
 - assess acceptance of the donation based on the donation.
 - designated means a donation for a special purpose – example: Leith Wheeler Investment Counsel Scholarship, etc.

- donors can recommend that the scholarship be directed to students studying in a particular field; law, medicine, education, nursing, finance, trades and other specialized areas. Scholarships could also be established in the name of an individual example: Chief Seekaskootch Memorial Scholarship.

Designated Donations

Scholarships:

OLETF encourages corporations and individuals to endow student scholarships for full-time post-secondary education. Once established, OLETF in its sole discretion will choose eligible and deserving Onion Lake students for the scholarships provided. Students must compete and sign a detailed application form provided by OLETF and if awarded a scholarship, their post-secondary institution must provide a letter of Confirmation of Enrolment before any payment is made.

OLETF is pleased to name a Scholarship on behalf of the corporation, organization or individual providing the funding (example – Connor, Clark & Lunn Investment Management Scholarship).

Scholarship endowments can be made on a continuing basis (annually) or as a one-time event.

OLETF will gratefully acknowledge all scholarship donations, provided further acknowledgement of donations in brochures, annual reports, news release, OLETF website, OLCN website and at events such as an Awards Evening.

Special Situations:

The following special situations have been identified for informational purposes.

OLEFT will accept donations bequeathed by a Will. A donation for a scholarship or endowment in the memory and name of a loved one will acknowledge the person and carry on their legacy through supporting deserving students.

The OLETF is notified by the person administering the Will that there is a bequest naming the OLETF.

- OLETF Board of Trustees is to receive all correspondence and documents associated with the bequest.
- An evaluation of the bequest will be undertaken by the OLETF

Donation

Acknowledgement:

Acknowledgement for accepted or rejected donations will be coordinated by the OLETF Board of Trustees.

No actions should take place which might be interpreted as an acceptance or rejection of a donation until the decision to accept or reject a donation has been made and communicated to the donor in writing by the Board of Trustees.

The OLETF Board of Trustees will maintain all donation acknowledgment records.

OFFICIAL RECEIPTS

For donations, an official receipt will be provided by the Onion Lake Cree Nation not OLETF. Onion Lake Cree Nation (OLCN) is not registered with CRA for charitable tax receipts, however, the Nation can issue an official receipt. OLCN and OLETF do not have charitable tax numbers.

Policy Title:	Donations and Sponsorship Policy
Policy Number:	OLETF (T-02)
Review Frequency:	Every 3 years, or earlier if needed
Approval Date:	May 24, 2019
Implementation Date:	May 24, 2019
Authority:	Onion Lake Education Trust Fund – Trust Deed 2015
Scope:	This Policy applies to the Board of Trustees and copies can be provided to Donors if requested.
Responsible Division:	OLETF Board of Trustees handle on donations and sponsorships accordance with this policy.
Superseding Effect:	This Policy supersedes all previous policies and memoranda concerning the subject matter. Only the Board of Trustees may authorize exceptions to this policy.
Schedule A Attached:	List of Scholarship Donations to Onion Lake Education Trust Fund.
Reference to other Policies:	Scholarship Selection Criteria & Administrative Procedures List of Available Scholarships number T-003-19

SCHEDULE A

ONION LAKE EDUCATION TRUST FUND (“OLETF”) DONATIONS AND SPONSORSHIP POLICY

List of Scholarship Donations to Onion Lake Education Trust Fund.

YEAR	NAME	AMOUNT	DURATION
2018	Connor Clark & Lunn Investment Management (Vancouver)	\$2,500	Annual (Fall Semester)
2018	Trustees of Wicekaskosiw Sahkahikan Askiwi-Pimiy Heritage Trust Fund	\$2,500	Annual (Fall Semester)
2019	Advance Engineered Products Group	\$2,000	One Time (Fall Semester)
2019	Leith Wheeler Investment Counsel (Vancouver)	\$2,500 (2 @ \$1,250)	Annual (Winter Semester)
2019	MNP LLP - Accounting Firm (Saskatoon office)	\$1,500	Annual? (Fall Semester)

SCHEDULE B

LIST OF AVAILABLE SCHOLARSHIPS

FORMAL APPLICATION BY ELIGIBLE STUDENTS REQUIRED

IF SELECTED, EVERY STUDENT MUST PROVIDE LETTER OF CONFIRMATION OF ENROLMENT SIGNED BY THEIR POST-SECONDARY INSTITUTION BEFORE ANY PAYMENT IS MADE.

A STUDENT IS ONLY ELIGIBLE TO APPLY FOR A SCHOLARSHIP ONCE PER YEAR. FOR EXAMPLE, A STUDENT WHO RECEIVES A SCHOLARSHIP FOR THE FALL SEMESTER IS NOT ELIGIBLE TO APPLY FOR THE FOLLOWING WINTER SEMESTER.

1. ONION LAKE CREE NATION POST SECONDARY SCHOLARSHIP – B - SEMI-ANNUALLY (FALL & WINTER SEMESTER)

Description

No less than ten (10) scholarships, in the amount of \$500 each are awarded semi-annually to students of the Onion Lake Cree Nation who are attending full-time studies at any accredited post-secondary institution. Additional scholarships in the amount of \$1,250 will also be awarded semi-annually subject to available funding. In addition to the academic standards of the applicants, consideration may be given to the student's community service, artistic or athletic achievements and financial circumstances. The Selection Committee of Trustees of the Onion Lake Cree Nation Education Trust select students semi-annually. Responsibility of administration and the payment of the scholarships to the selected students is that of the OLETF Board of Trustees.

Source of Funding

Funding for these specific scholarships is an allocation from OLETF Trust Revenue by the Board of Trustees of the OLETF.

2. LEITH WHEELER INVESTMENT COUNSEL LTD. – POST-SECONDARY SCHOLARSHIP – ANNUALLY (WINTER SEMESTER)

Description

These two (2) scholarships, in the amount of \$1,250 each are awarded annually to students of the Onion Lake Cree Nation who are attending full-time studies at any accredited post-secondary institution. In addition to the academic standards of the applicants, consideration may be given to the student's community service, artistic or athletic achievements and financial circumstances. The Trustees of the Onion Lake Cree Nation Education Trust will select the students each year. Responsibility of administration and the payment of the scholarships to the selected student is that of the OLETF Board of Trustees.

Source of Funding

Annual funding for this specific scholarship is generously provided by Leith Wheeler Investment Counsel, Vancouver, a Canadian Investment Management firm that provides investment services to Onion Lake Nation's Wicekaskosiw Sahkahikan Askiwi-Pimiy Heritage Trust Fund.

3. CONNOR CLARK & LUNN – INVESTMENT MANAGEMENT LTD – POST-SECONDARY SCHOLARSHIP – ANNUALY (FALL SEMESTER)

Description

This scholarship, in the amount of \$2,500 is awarded annually to a student of the Onion Lake Cree Nation who is attending full-time studies at any accredited post-secondary institution in Canada. In addition to the academic standards of the applicants, consideration may be given to the student's community service, artistic or athletic achievements and financial circumstances. The Trustees of the Onion Lake Cree Nation Education Trust will select the student each year. Responsibility of administration and the payment of the scholarship to the selected student is that of the OLETF Board of Trustees.

Source of Funding

Annual funding for this specific scholarship is generously provided by Connor, Clark & Lunn, a Canadian Investment Management firm that provides investment services to Onion Lake Nation's Wicekaskosiw Sahkahikan Askiwi-Pimiy Heritage Trust Fund.

4. WSAP HERITAGE TRUST - ONION LAKE CREE NATION POST-SECONDARY SCHOLARSHIP – A – SEMI-ANNUALLY (FALL & WINTER SEMESTER)

Description

Scholarships in the amounts of \$2,500 and \$1,250 are awarded semi-annually to students of the Onion Lake Cree Nation who are attending full-time studies at any accredited post-secondary institution in Canada. In addition to the academic standards of the applicants, consideration may be given to the student's community service, artistic or athletic achievements and financial circumstances. The Selection Committee of Board of Trustees of the Onion Lake Cree Nation Education Trust select students each year. Responsibility of administration and the payment of the scholarship to the selected students is that of the OLETF Board of Trustees.

Source of Funding

Annual funding for this specific scholarship is generously provided by individuals associated with the Wicekaskosiw Sahkahikan Askiwi-Pimiy Heritage Trust Fund in their personal, individual capacities only (Dr. Stanley Hamilton, Julian Leong, Justin Jimmy, William MacLachlan and Terry Munro).

5. ADVANCED ENGINEERED PRODUCTS GROUP – SCHOLARSHIP (ONE-TIME FALL 2019)

Description

Two (2) Scholarships on the amount of \$1,000 each will be awarded in the Fall 2019 to students of the Onion Lake Cree Nation who is attending full-time studies at any accredited post-secondary institution in Canada. In addition to the academic standards of the applicants, consideration may be given to the student's community service, artistic or athletic achievements and financial circumstances. The Selection Committee of Board of Trustees of the Onion Lake Cree Nation Education Trust select students each year. Responsibility of administration and the payment of the scholarship to the selected students is that of the OLETF Board of Trustees.

Source of Funding

Funding for this specific scholarship is generously provided by Advance Engineered Products Group (Regina) and its employees. The company is involved with people from the Onion Lake Cree Nation.

6. MEYERS NORRIS PENNY – MNP LLP – SCHOLARSHIP (ONE TIME FALL 2019)

Description

One-time Scholarship in the amount of \$1,500. It will be awarded in the Fall 2019 to student of the Onion Lake Cree Nation who is attending full-time studies at any accredited post-secondary institution in Canada with a preference to those enrolled in finance and or accounting courses or programs. In addition to the academic standards of the applicants, consideration may be given to the student's community service, artistic or athletic achievements and financial circumstances. The Board of Trustees of the Onion Lake Cree Nation Education Trust will select a student for the scholarship. Responsibility of administration and the payment of the scholarship to the selected student is that of the OLETF Board of Trustees.

Source of Funding

Funding for this specific scholarship is generously provided by MNP LLP, an accounting firm. MNP LLP is the auditor to the Onion Lake Cree Nation and other Nation entities.