

# Standards Handbook



IMAGINE CANADA  
Standards

Your reference guide to  
Imagine Canada Standards  
and Accreditation



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Standards v2022.2  
(last updated: February 2026)

Strong Charities.  
Strong Nonprofits.  
Strong Communities.



**Founding and Presenting Partner**

Canada Life has been a trusted partner of the nonprofit sector for over three decades. Their support for the Imagine Canada Standards reflects a shared commitment to strengthening nonprofits and the incredible work happening across the country.

# About Imagine Canada

Imagine Canada is a national, bilingual charitable organization dedicated to strengthening Canada's charitable sector. Through our advocacy efforts, research and social enterprises, we help strengthen charities, nonprofits, and social entrepreneurs so they can better fulfill their missions. Our vision is of a strong Canada where charities work together alongside businesses and governments to build resilient and vibrant communities.



## **Imagine a Canada...**

Where nonprofits are community-driven, trusted, valued, and recognized as essential partners in building thriving communities.

Where these organizations have the resources to think big, act boldly, and invest in solutions that actually solve problems—with support reaching communities that need it most.

Where nonprofit leaders are future-ready, reflect the full diversity of our communities, and govern with clarity and confidence—equipped to navigate complexity, dismantle barriers, and drive transformative change.

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# Introduction

**Imagine Canada Standards** is the only national best practices framework created by the nonprofit sector for the nonprofit sector. The Standards provide shared best practices to strengthen governance, improve operations, and manage risk effectively.

Information on how to comply with the standards, as well as tools and resources to help organizations continue strengthening their practices, is available free of charge.

**Imagine Canada Accreditation** is a transformational process that awards a Trustmark to organizations that meet these standards. Accredited organizations demonstrate a commitment to quality and accountability to their teams, donors, and communities.

## The Standards

The Standards strengthen five fundamental areas of governance and operations within every nonprofit organization:

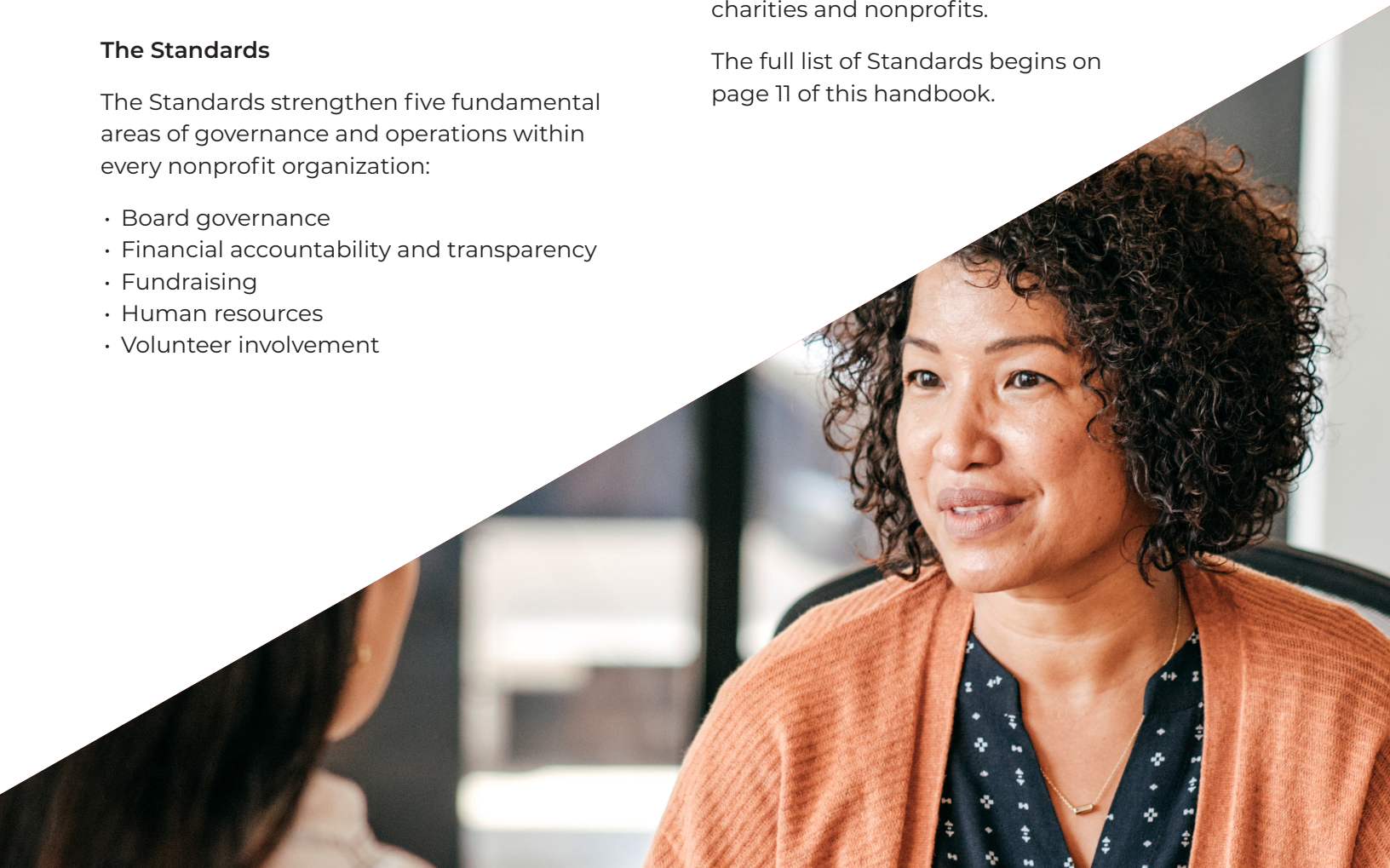
- Board governance
- Financial accountability and transparency
- Fundraising
- Human resources
- Volunteer involvement

## By the Sector, For the Sector

The 73 standards were developed and refined through broad consultation with a wide range of charities and nonprofits across Canada. Leaders from across the sector, along with board members, staff, volunteers, funders, and governance experts, contributed their perspectives.

Changes to the Standards are overseen by the Standards Council, a volunteer body whose members bring deep experience in the nonprofit sector and a strong commitment to upholding and advancing sector-wide practices. The Standards Council members are appointed by the Imagine Canada Board, who themselves are elected by Imagine Canada's membership of charities and nonprofits.

The full list of Standards begins on page 11 of this handbook.



# Accreditation Process



# Accreditation Process

## How Accreditation Works

The Imagine Canada Standards Accreditation is a strategic investment in organizational strength, credibility, and long-term sustainability. It demonstrates a commitment to strong governance, transparency, and operational excellence.

The process typically takes six months to 18 months, depending on readiness, and requires meaningful engagement from both the board and staff. While it involves time and resources, the return is significant: stronger systems, clearer roles, and increased confidence from stakeholders.

Throughout their journey to accreditation, organizations receive guidance, peer support, and independent review to ensure a rigorous and credible process.





The accreditation process is designed to be rigorous, yet accessible, supporting organizations as they strengthen their practices. The process comprises three stages.

## 1. Preparation

Begin by reviewing the standards and evidence requirements for your level (see page 9). This handbook lists all 73 standards along with a summary of the evidence required for your application. Discuss the Accreditation with your board and use the **Gap Analysis Tool** as a self-assessment tool to identify any gaps your organization needs to address before applying.

When your organization is ready to pursue accreditation, join the Standards Community. A **monthly fee** gives you access to volunteer peer advisors from accredited organizations, personalized support from a dedicated staff lead, a secure, collaborative online application hub, and access to sample policies and other resources. You work through your application at your own pace.

## 2. Application

When you are ready, program staff will screen your application and provide feedback to help prepare it for peer review. You can then submit your application for peer review where it will be assessed by a panel of peer reviewers who determine whether your organization meets all standards for your level.

Reviewers represent accredited and other organizations from across the country and bring a wide range of sectoral perspectives and professional experience. Through their detailed assessments and constructive feedback, peer reviewers ensure the rigour and integrity of the accreditation process.

## 3. Accreditation

When an organization is deemed compliant with applicable standards, it can be accredited.



**Accredited**  
**IMAGINE CANADA**

Successfully accredited organizations earn the right to use the Accreditation Trustmark, a widely recognized symbol of trust, excellence and accountability.

Accredited organizations must complete a full reaccreditation process every five years to maintain their status. Ongoing compliance with the standards is assessed annually.



**Ready to start your  
accreditation journey?**

Access resources and prepare  
your application at your own pace.  
Start your journey at

[imaginecanada.ca/standards](https://imaginecanada.ca/standards)

# A Framework Scaled to Your Organization

The standards are organized into three levels, determined by your organization's size. Fewer standards apply to smaller organizations, and some requirements are adapted to reflect their size.

## How to determine the level for your organization

To determine your organizational level, we assess the size of your organization, measured by your annual expenses and the number of full-time equivalent (FTE) employees, which are both based on the average of your last three fiscal years.

**Annual expenses** are based on the amounts reported on line 5100 of the Registered Charity Information Return (T3010). For nonprofits, financial statements are used for this assessment.

Employees include all paid staff of the organization, regardless of employment type, including full-time, part-time, fixed-term contract, salaried, or hourly positions. **Full-time equivalent (FTE)** refers to the total workforce expressed in full-time positions rather than a headcount. One FTE represents one full-time employee; for example, two employees working half-time each together equal one FTE.

Organizations with less than \$3 million in annual expenses and 10 or fewer FTE employees are assigned level 1 standards. Organizations that are larger than this, either measured by expenses or FTE, will be assigned either level 2 or level 3 standards, as per the table below.

|                        | FTE: 10 OR FEWER | FTE: 11-50 | FTE: >50 |
|------------------------|------------------|------------|----------|
| EXPENSES: \$3M OR LESS | Level 1          | Level 2    | Level 3  |
| EXPENSES: \$3M-\$10M   | Level 2          | Level 2    | Level 3  |
| EXPENSES: OVER \$10M   | Level 3          | Level 3    | Level 3  |

**Example 1:** An organization with 8 FTE and \$4 million in expenses is Level 2 (expenses exceed the \$3 million threshold)

**Example 2:** An organization with 80 FTE and \$8 million in expenses is Level 3 (FTE exceeds the 50-employee threshold)

## Non-Applicable Standards and Special Considerations

Some standards are inapplicable to certain organizations due to their operating realities. For instance, an entirely volunteer-run organization would likely be exempted from the Staff Management standards.

Under certain circumstances, organizations may be eligible for special consideration when they do not strictly meet the requirements of a standard, but can demonstrate alignment with its underlying intent.



To determine your level or discuss a potential special consideration before beginning your application, contact the Standards team at:

[standards@imaginecanada.ca](mailto:standards@imaginecanada.ca)







The Standards

# A. Board Governance

# Board Governance

How organizations determine their mission, plan their strategy and mitigate risk, as well as how organizations recruit, structure and evaluate their board.

## LEGEND

|   |          |
|---|----------|
| ≡ | Standard |
| Q | Evidence |

|                              | LEVEL 1                                                                                                                                                                                                          | LEVEL 2                                                                                                                                                                                                                                                                                                                                 | LEVEL 3                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>A1. MISSION STATEMENT</b> |                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| ≡                            | The organization has a mission statement. The mission statement is revisited and approved by the board at least every five years to ensure its continued relevance.                                              |                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Q                            | <ul style="list-style-type: none"> <li>• A description of the process the board uses to review its mission statement.</li> <li>• The date the board last reviewed and approved the mission statement.</li> </ul> |                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>A2. STRATEGIC PLAN</b>    |                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| ≡                            | The board is responsible for approving a strategic plan. The organization has a process to evaluate progress in achieving the plan's goals.                                                                      | The board is responsible for approving a strategic plan. The organization has a written plan that explains how it will measure progress towards achieving the goals identified in the strategic plan. At least once a year, the board reviews the organization's progress towards achieving the goals identified in the strategic plan. | The board is responsible for approving a strategic plan. The organization has a written plan that explains how it will measure progress towards achieving the goals identified in the strategic plan. At least once a year, the board reviews the organization's progress towards achieving the goals identified in the strategic plan. The organization's progress on achieving its strategic goals is made publicly available where data are available. |

|                                                             | LEVEL 1                                                                                                                                                                                                                                                                                | LEVEL 2                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | LEVEL 3                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Q                                                           | <ul style="list-style-type: none"><li>• A copy of the strategic plan.</li><li>• A copy of the motion from the board meeting where the strategic plan was approved.</li><li>• A description of the process the board uses to evaluate progress in achieving the plan's goals.</li></ul> | <ul style="list-style-type: none"><li>• A copy of the strategic plan.</li><li>• A copy of the motion from the board meeting where the strategic plan was approved.</li><li>• A copy of the written plan that explains how the organization will measure progress towards achieving the goals identified in the strategic plan. (Note: This document may or may not be included in the strategic plan itself).</li><li>• The date the board last reviewed the organization's progress towards achieving the goals identified in the strategic plan.</li></ul> | <ul style="list-style-type: none"><li>• A copy of the strategic plan.</li><li>• A copy of the motion from the board meeting where the strategic plan was approved.</li><li>• The date the board last reviewed the organization's progress towards achieving the goals identified in the strategic plan.</li><li>• A copy of the written plan that explains how the organization will measure progress towards achieving the goals identified in the strategic plan. (Note: This document may or may not be included in the strategic plan itself).</li><li>• A description of the process the organization uses to make its progress on achieving its strategic goals available to the public.</li></ul> |
| A3. RECRUITMENT AND ORIENTATION OF MOST SENIOR STAFF PERSON |                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| ≡                                                           | The board is accountable for the recruitment and orientation of the most senior staff person.                                                                                                                                                                                          | The board is accountable for the recruitment and orientation of the most senior staff person. The recruitment process is fair and transparent and is managed in a professional manner by the board. The board is responsible for ensuring that the most senior staff person receives the appropriate orientation required to assume their responsibilities.                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Q                                                           | <ul style="list-style-type: none"><li>• A description of the process the board uses to recruit and orient the most senior staff person.</li></ul>                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |





|                                                           | LEVEL 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | LEVEL 2                                                                                                                                                                                                                                                                                                        | LEVEL 3                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|-----------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| A4. MANAGEMENT OF MOST SENIOR STAFF PERSON                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| ≡                                                         | The most senior staff person reports to the board and has a written job description or terms of reference.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | The most senior staff person reports to the board and has a detailed job description or terms of reference, annual performance objectives, and an annual performance review.                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Q                                                         | <ul style="list-style-type: none"><li>• A copy of the job description OR terms of reference for the most senior staff person.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <ul style="list-style-type: none"><li>• A copy of the job description OR terms of reference for the most senior staff person.</li><li>• A copy of the current performance objectives for the most senior staff person.</li><li>• The date of the most senior staff person's last performance review.</li></ul> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| A5. COMPENSATION AND EXPENSES OF MOST SENIOR STAFF PERSON |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| ≡                                                         | The total compensation package of the most senior staff person is approved by the board or a board committee once a year. The expenses of the most senior staff person are reviewed by the board or a board committee once a year.                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Q                                                         | <ul style="list-style-type: none"><li>• A copy of the motion from the board or committee meeting where the total compensation package for the most senior staff person was last approved.</li><li>• The date the total compensation package for the most senior staff person was last reviewed and approved by the board or a board committee.</li><li>• A description of the process the board uses to review the expenses of the most senior staff person.</li><li>• The date the expenses of the most senior staff person were last reviewed by the board or a board committee.</li></ul> |                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| A6. SUCCESSION PLANNING – MOST SENIOR STAFF PERSON        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| ≡                                                         | The organization has a written emergency succession plan in place for the most senior staff person. The board or a board committee reviews and approves this plan every three years.                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                | The organization has a written long-term succession plan and a written emergency succession plan in place for the most senior staff person. The board or a board committee reviews and approves these plans every three years.                                                                                                                                                                                                                                            |
| Q                                                         | <ul style="list-style-type: none"><li>• A copy of the emergency succession plan for the most senior staff person.</li><li>• The date the board or a board committee last reviewed the emergency succession plan for the most senior staff person.</li></ul>                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                | <ul style="list-style-type: none"><li>• A copy of the emergency succession plan for the most senior staff person.</li><li>• A copy of the long-term succession plan for the most senior staff person.</li><li>• The date the board or a board committee last reviewed the emergency succession plan for the most senior staff person.</li><li>• The date the board or a board committee last reviewed the long-term succession plan for the most senior person.</li></ul> |

|                                                       | LEVEL 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | LEVEL 2                                                                                                                                                                                                                                                                                                                                       | LEVEL 3 |
|-------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| A7. RISK MANAGEMENT                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                               |         |
| ≡                                                     | The organization has a process to identify its major strategic and operational risks. The organization also has a plan to minimize and mitigate those risks, and this plan is reviewed and approved by the board once a year.                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                               |         |
| Q                                                     | <ul style="list-style-type: none"><li>• A description of the process used to identify the organization's major strategic and operational risks.</li><li>• The date the plan to minimize and mitigate risks was last reviewed and approved by the board.</li></ul>                                                                                                                                                                                                                                                                                      | <ul style="list-style-type: none"><li>• A description of the process used to identify the organization's major strategic and operational risks.</li><li>• The date the plan to minimize and mitigate risks was last reviewed and approved by the board.</li><li>• A copy of the organization's plan to mitigate and minimize risks.</li></ul> |         |
| A8. INSURANCE                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                               |         |
| ≡                                                     | The organization has a process to review its insurance coverages. A summary report is reviewed by the board once a year.                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                               |         |
| Q                                                     | <ul style="list-style-type: none"><li>• The date the board last reviewed the summary report on insurance coverages.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                          | <ul style="list-style-type: none"><li>• A copy of the minutes from the board meeting where the summary report on insurance coverages was reviewed.</li><li>• The date the board last reviewed the summary report on insurance coverages.</li></ul>                                                                                            |         |
| A9. LEGAL COMPLIANCE                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                               |         |
| ≡                                                     | The board or a board committee oversees the organization's compliance with its own governing documents (e.g., letters patent, by-laws) and all applicable federal, provincial, territorial and municipal laws and regulations. Organizations conducting programs outside Canada also abide by applicable laws, regulations and conventions in that jurisdiction, unless these are in conflict with laws in Canada.                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                               |         |
| Q                                                     | <ul style="list-style-type: none"><li>• A description of the process the board uses to oversee the organization's compliance with its own governing documents and all applicable laws and regulations.</li></ul>                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                               |         |
| A10. COMMUNICATION AND CONSULTATION WITH STAKEHOLDERS |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                               |         |
| ≡                                                     | The organization identifies its stakeholders and regularly communicates and consults with these stakeholders about the organization's achievements and work.                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                               |         |
| Q                                                     | <ul style="list-style-type: none"><li>• A description of the strategies and practices used to 1. consult with stakeholders, and 2. communicate with stakeholders.</li></ul>                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                               |         |
| A11. CODE OF ETHICS/CONDUCT                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                               |         |
| ≡                                                     | The organization has code(s) of ethics/conduct that apply to the board, staff and volunteers. The organization has a process in place to ensure that the board, staff and volunteers are familiar with and adhere to the code(s). The code(s) are reviewed and approved every five years by the board or a board committee.*<br><br>*If your organization has a separate code that applies only to staff members and/or non-board volunteers, this policy can be reviewed and approved by senior staff, rather than by the board or a board committee. |                                                                                                                                                                                                                                                                                                                                               |         |
| Q                                                     | <ul style="list-style-type: none"><li>• Copies of the codes of ethics/conduct that apply to the board, staff and volunteers.</li><li>• A description of the process used to ensure that the board, staff and volunteers are familiar with and adhere to the code(s).</li><li>• The date the code(s) were last reviewed and approved by the board or a board committee (and senior staff if applicable).</li></ul>                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                               |         |

|                                  | LEVEL 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | LEVEL 2                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | LEVEL 3 |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| A12. CONFLICT OF INTEREST POLICY |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |         |
| ≡                                | <p>The organization has conflict of interest policies that apply to the board, staff, and volunteers. The policies outline the procedure for disclosure, review and decision on actual or perceived conflicts of interest. These policies are reviewed and approved every five years by the board or a board committee.*</p> <p>*If your organization has a separate policy that applies only to staff members and/or non-board volunteers, this policy can be reviewed and approved by senior staff, rather than by the board or a board committee.</p> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |         |
| Q                                | <ul style="list-style-type: none"><li>• Copies of the conflict of interest policies that apply to the board, staff, and volunteers.</li><li>• A description of the process used to ensure that the board, staff and volunteers are familiar with and adhere to the conflict of interest policy.</li><li>• The date the policies were last reviewed and approved by the board or a board committee (and senior staff if applicable).</li></ul>                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |         |
| A13. PRIVACY POLICY              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |         |
| ≡                                | <p>The organization has a privacy policy that is posted in a readily accessible location on its website. This policy is reviewed and approved by the board or a board committee every five years.</p>                                                                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |         |
| Q                                | <ul style="list-style-type: none"><li>• A link to the page on the organization's website where the organization's privacy policy can be found.</li><li>• The date the policy was last reviewed and approved by the board or a board committee.</li></ul>                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |         |
| A14. COMPLAINTS POLICY           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |         |
| ≡                                | <p>The organization has a complaints policy applicable to external stakeholders that is posted in a readily accessible location on its website. The organization responds promptly to complaints made by external stakeholders. The board is presented with a report on complaints once a year. The complaints policy is reviewed and approved by the board or a board committee every five years.</p>                                                                                                                                                   | <p>The organization has a complaints policy applicable to external stakeholders that is posted in a readily accessible location on its website. The organization responds promptly to complaints by external stakeholders. The organization informs the board at least once a year of the number, type and disposition of complaints received. The complaints policy is reviewed and approved by the board or a board committee every five years.</p>                                                                                                                                      |         |
| Q                                | <ul style="list-style-type: none"><li>• A link to the page on the organization's website where the complaints policy can be found.</li><li>• A copy of the most recent report on complaints from external stakeholders presented to the board OR an excerpt from the minutes of the board meeting where the report was presented verbally.</li><li>• The date the policy was last reviewed and approved by the board or a board committee.</li></ul>                                                                                                     | <ul style="list-style-type: none"><li>• A link to the page on the organization's website where the complaints policy can be found.</li><li>• A copy of the most recent report on complaints from external stakeholders presented to the board, including the number, type and disposition of complaints received OR an excerpt from the minutes of the board meeting where the report was presented verbally, including the number, type and disposition of complaints received.</li><li>• The date the policy was last reviewed and approved by the board or a board committee.</li></ul> |         |

|                           | LEVEL 1                                                                                                                                                                                                                                                                                            | LEVEL 2 | LEVEL 3                                                                                                                                                                                                                                                                                                                                                                                                      |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| A15. WHISTLEBLOWER POLICY |                                                                                                                                                                                                                                                                                                    |         |                                                                                                                                                                                                                                                                                                                                                                                                              |
| Q                         | Not applicable                                                                                                                                                                                                                                                                                     |         | The organization has a policy that enables individuals to come forward with information on illegal practices or violations of organizational policies. This policy must specify that the organization will not retaliate against, and will protect the confidentiality of, individuals who make good-faith reports. This policy is reviewed and approved by the board or a board committee every five years. |
| ≡                         | • Not applicable                                                                                                                                                                                                                                                                                   |         | <ul style="list-style-type: none"><li>• A copy of the organization's whistleblower policy.</li><li>• The date the policy was last reviewed and approved by the board or a board committee.</li></ul>                                                                                                                                                                                                         |
| A16. NUMBER OF MEETINGS   |                                                                                                                                                                                                                                                                                                    |         |                                                                                                                                                                                                                                                                                                                                                                                                              |
| ≡                         | The board holds a sufficient number of meetings each year to ensure the appropriate direction and oversight of the organization's activities. At minimum, the board holds two meetings a year at which the agenda is not restricted to a specific issue or issues (e.g., appointment of officers). |         |                                                                                                                                                                                                                                                                                                                                                                                                              |
| Q                         | • Copies of two board meeting agendas from the last 12 months.                                                                                                                                                                                                                                     |         |                                                                                                                                                                                                                                                                                                                                                                                                              |





|                               | LEVEL 1                                                                                                                                                                                                                                                                                                                         | LEVEL 2                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | LEVEL 3 |
|-------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| A17. BOARD TERMS OF REFERENCE |                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |         |
| ≡                             | The organization has written terms of reference for the board and board chair. These terms of reference have been approved by the board.                                                                                                                                                                                        | The organization has written terms of reference for the board,* board committees and board chair. These terms of reference have been approved by the board.<br><br>*The board terms of reference outline how the board will review, approve, and monitor the organization's: mission/strategic direction, annual budget, key financial transactions, compensation practices and policies, and fiscal and governance policies.                                                      |         |
| Q                             | <ul style="list-style-type: none"><li>• A copy of the terms of reference for the board.</li><li>• The date the board approved the terms of reference for the board.</li><li>• A copy of the terms of reference for the board chair.</li><li>• The date the board approved the terms of reference for the board chair.</li></ul> | <ul style="list-style-type: none"><li>• A copy of the terms of reference for the board.</li><li>• The date the board approved the terms of reference for the board.</li><li>• A copy of the terms of reference for the board chair.</li><li>• The date the board approved the terms of reference for the board chair.</li><li>• A copy of the terms of reference for a board committee.</li><li>• The date the board approved this board committee's terms of reference.</li></ul> |         |
| A18. BOARD COMPOSITION        |                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |         |
| ≡                             | The board is comprised of no fewer than three (but preferably five or more) directors, a majority of whom are at arm's length to each other, to the most senior staff person and/or to other management staff. No employee may be a director.                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |         |
| Q                             | <ul style="list-style-type: none"><li>• The Standards Program declaration signed by the most senior staff person and the board chair confirming that the organization is in compliance with this standard.</li></ul>                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |         |
| A19. BOARD COMPENSATION       |                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |         |
| ≡                             | No member of the board is entitled to receive, either directly or indirectly, any salary, wages, fees, commissions or other amount for services rendered to the organization in their capacity as a director.                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |         |
| Q                             | <ul style="list-style-type: none"><li>• A copy of the organization's policy on compensation of board members OR an excerpt from the organization's bylaws demonstrating that the organization is meeting this standard.</li></ul>                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |         |
| A20. BOARD ORIENTATION        |                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |         |
| ≡                             | A process is in place to ensure the orientation of new board members. Board members must understand their legal and fiduciary responsibilities, exercise due diligence consistent with their duty of care, be familiar with the organization's activities, and be fully informed of the financial status of the organization.   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |         |
| Q                             | <ul style="list-style-type: none"><li>• A description of the process used to orient new board members and a summary of the orientation content.</li></ul>                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |         |
| A21. BOARD RECORDS            |                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |         |
| ≡                             | Formal minutes of board meetings are recorded and retained.<br>Policies approved by the board are filed appropriately.                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |         |
| Q                             | <ul style="list-style-type: none"><li>• One example of board minutes from the last 12 months.</li><li>• A description of how minutes of board meetings are recorded and retained.</li><li>• A description of how policies approved by the board are filed appropriately.</li></ul>                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |         |

|                               | LEVEL 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | LEVEL 2                                                                                                                                                                                                                                                                                                                             | LEVEL 3                                                                                                                                                                                                                                                               |
|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| A22. BOARD SUCCESSION         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                       |
| ≡                             | The board has a process to review succession plans for the positions of board chair and committee chairs once a year.                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                       |
| Q                             | • A description of the process used to review succession plans for the positions of board chair and committee chairs once a year.                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                       |
| A23. BOARD DEVELOPMENT        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                       |
| ≡                             | Not applicable                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | The board or a board committee has a process to assess the development needs of board directors and provides appropriate educational opportunities for them where appropriate. This process takes place once a year.                                                                                                                |                                                                                                                                                                                                                                                                       |
| Q                             | • Not applicable                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | • A description of the process the board or a board committee uses to assess the development needs of board directors and provides appropriate educational opportunities for them where appropriate.<br>• The date the board or a board committee last discussed development needs and educational opportunities for board members. |                                                                                                                                                                                                                                                                       |
| A24. PERFORMANCE OF THE BOARD |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                       |
| ≡                             | Not applicable                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | The board has a process to review its own performance. The performance review takes place once a year.                                                                                                                                                                                                                              | The board has a process to review the performance of individual directors and the board as a whole. These performance reviews take place once a year.                                                                                                                 |
| Q                             | • Not applicable                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | • A description of the process the board uses to review its own performance.<br>• The date of the last board performance review.                                                                                                                                                                                                    | • A description of the process the board uses to review the performance of individual directors and of the board as a whole.<br>• The date of the most recent performance review for individual directors.<br>• The date of the most recent board performance review. |
| A25. ANTI-HARASSMENT POLICY   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                       |
| ≡                             | The organization has anti-harassment policies that apply to the board, staff and volunteers. These policies are made accessible to the board, staff and volunteers. These policies are reviewed and approved every five years by the board or a board committee*.<br><br>*If your organization has a separate policy that applies only to staff members and/or non-board volunteers, this policy can be reviewed and approved by senior staff, rather than by the board or a board committee. |                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                       |
| Q                             | • Copies of the anti-harassment policies that apply to the board, staff and volunteers.<br>• A description of how the policies are made accessible to the board, staff and volunteers.<br>• The date the policies were last reviewed and approved by the board or a board committee (and senior staff if applicable).                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                       |

|                                  | LEVEL 1                                                                                                                                                                                                                                                                                       | LEVEL 2 | LEVEL 3 |
|----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|---------|
| A26. BOARD TERM LIMITS           |                                                                                                                                                                                                                                                                                               |         |         |
| ≡                                | The organization mandates specific term limits for directors with the effect that no more than one third of the directors shall exceed 9 consecutive years on the board.                                                                                                                      |         |         |
| Q                                | <ul style="list-style-type: none"><li>• An excerpt from the bylaws specifying term limits for directors OR<br/>An excerpt from the board terms of reference specifying term limits for directors AND a list of all current board members with the number of years they have served.</li></ul> |         |         |
| A27. EQUITY AND INCLUSION POLICY |                                                                                                                                                                                                                                                                                               |         |         |
| ≡                                | The organization has a board-approved equity and inclusion policy. This policy is reviewed and approved by the board or a board committee every five years.                                                                                                                                   |         |         |
| Q                                | <ul style="list-style-type: none"><li>• A copy of the organization's policy on equity and inclusion.</li><li>• The date the policy was last reviewed and approved by the board or a board committee.</li></ul>                                                                                |         |         |
| A28. IN CAMERA SESSIONS          |                                                                                                                                                                                                                                                                                               |         |         |
| ≡                                | At least twice a year, the board holds a scheduled in camera session with only the board present.<br>At least twice a year, the board holds a scheduled in camera session with only the board and the most senior staff person present.                                                       |         |         |
| Q                                | <ul style="list-style-type: none"><li>• The last two dates when a scheduled in camera session was held with only the board present.</li><li>• The last two dates when a scheduled in camera session was held with only the board and the most senior staff person present.</li></ul>          |         |         |





The Standards

# B. Financial Accountability & Transparency



# Financial Accountability & Transparency

How organizations oversee their budget, monitor their financial position and follow reporting requirements.

## LEGEND

|                                                                                     |          |
|-------------------------------------------------------------------------------------|----------|
|  | Standard |
|  | Evidence |

|                                                                                     | LEVEL 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | LEVEL 2 | LEVEL 3 |
|-------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|---------|
| <b>B1. FINANCIAL STATEMENTS</b>                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |         |         |
|    | Organizations must complete annual financial statements in accordance with an acceptable accounting framework as identified by Chartered Professional Accountants Canada (CPA Canada).                                                                                                                                                                                                                                                                                                                             |         |         |
|    | <ul style="list-style-type: none"> <li>• Evidence provided under standard B2</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                            |         |         |
| <b>B2. AUDIT OR REVIEW ENGAGEMENT</b>                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |         |         |
|  | Organizations with over \$1 million in annual revenue must have their financial statements audited by an independent licensed public accountant. Other organizations may have a review engagement unless they are required by their governing legislation to have an audit.                                                                                                                                                                                                                                        |         |         |
|  | <ul style="list-style-type: none"> <li>• A copy of the organization's most recent annual financial statements including the audit or review engagement report.</li> </ul>                                                                                                                                                                                                                                                                                                                                          |         |         |
| <b>B3. RELEASE OF FINANCIAL STATEMENTS</b>                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |         |         |
|  | The organization's financial statements must be received and approved by the board and released within six months of year-end.                                                                                                                                                                                                                                                                                                                                                                                     |         |         |
|  | <ul style="list-style-type: none"> <li>• A copy of the motion from the board meeting where the most recent annual financial statements were approved.</li> <li>• The date the board approved the most recent annual financial statements.</li> </ul>                                                                                                                                                                                                                                                               |         |         |
| <b>B4. TAX FILING</b>                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |         |         |
|  | <p>The board has a process to ensure that an accurate tax return* is filed with the Canada Revenue Agency (CRA) within six months of year-end, as required by law. The board or a board committee reviews and approves the tax return annually, prior to its submission to the CRA.</p> <p>* Charities are required to fill out a T3010, Nonprofits fill out a T2, and RCAAAs fill out a T2052.</p>                                                                                                                |         |         |
|  | <ul style="list-style-type: none"> <li>• A copy of the public portions of the most recent information return or tax return*.</li> <li>• * Charities are required to fill out a T3010, Nonprofits fill out a T2, and RCAAAs fill out a T2052.</li> <li>• The date the tax form was approved by the board or a board committee.</li> <li>• The date the tax form was filed with the CRA.</li> <li>• A description of the process the board uses to ensure timely and accurate submission of the tax form.</li> </ul> |         |         |

|                                                             | LEVEL 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | LEVEL 2                                                                                                                                                                                                                                                                                                                                           | LEVEL 3 |
|-------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| B5. BUDGET APPROVAL AND OVERSIGHT                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                   |         |
| ≡                                                           | The board approves the annual operating budget. The board has a process to monitor the organization's performance in relation to the annual budget. The board or a board committee reviews the cash position of the organization in relation to its future obligations at least twice a year. The board or a board committee reviews actual revenues and expenses versus budget at least twice a year.                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                   |         |
| Q                                                           | <ul style="list-style-type: none"><li>• A copy of the motion from the board meeting where the annual budget was approved, including the date of the meeting.</li><li>• A description of the process the board uses to monitor the organization's performance in relation to its annual budget.</li><li>• The last two dates when the board or a board committee reviewed the cash position of the organization in relation to its future obligations.</li><li>• The last two dates when the board or a board committee reviewed actual revenues and expenses versus budget.</li></ul> |                                                                                                                                                                                                                                                                                                                                                   |         |
| B6. STATUTORY REMITTANCES                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                   |         |
| ≡                                                           | At least twice a year, the board or a board committee receives assurance from management that all statutory remittances have been made.                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                   |         |
| Q                                                           | <ul style="list-style-type: none"><li>• The last two dates when the board or a board committee received assurance that all statutory remittances have been made.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                   |         |
| B7. BOARD OVERSIGHT OF FUNDRAISING AND ADMINISTRATIVE COSTS |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                   |         |
| ≡                                                           | The board reviews the cost-effectiveness of the organization's fundraising activities, including administrative expenses, at least annually.                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                   |         |
| Q                                                           | <ul style="list-style-type: none"><li>• The date the board last reviewed the cost-effectiveness of the organization's fundraising activities, including administrative expenses.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                            | <ul style="list-style-type: none"><li>• The process the board uses to review the cost-effectiveness of the organization's fundraising activities, including administrative expenses.</li><li>• The date the board last reviewed the cost-effectiveness of the organization's fundraising activities, including administrative expenses.</li></ul> |         |
| B8. INVESTMENT POLICY                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                   |         |
| ≡                                                           | Organizations with investable assets over \$100,000 must have an investment policy setting out asset allocation, procedures for investments, and asset protection issues. This policy is reviewed and approved by the board every five years.                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                   |         |
| Q                                                           | <ul style="list-style-type: none"><li>• A copy of the organization's investment policy.</li><li>• The date the policy was last reviewed and approved by the board.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                   |         |

|                                                                                   | LEVEL 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | LEVEL 2                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | LEVEL 3 |
|-----------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| <b>B10. DISCLOSURE - GENERAL</b>                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |         |
|  | <p>The organization makes the most recent three years of financial statements and the names of all board members available on its website. If the organization is a charity or an RCAA, it makes its CRA registration number and the public portion of its most recent T3010 OR T2052 available on its website.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p>The organization makes the most recent three years of annual reports, the most recent three years of financial statements, and the names of all board members available on its website.</p> <p>If the organization is a charity or an RCAA, it makes its CRA registration number and the public portion of its most recent T3010 OR T2052 available on its website.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |         |
|  | <ul style="list-style-type: none"> <li>• A link to the page on the organization's website where the most recent three years of financial statements—including notes as approved by the board and the report of the independent licensed public accountant who conducted the audit or review engagement—can be found.</li> <li>• A link to the page on the organization's website where the names of all board members can be found.</li> <li>• Charities &amp; RCAAs only: A link to the page on the organization's website where its registration number (BN) assigned by the Canada Revenue Agency (CRA) can be found.</li> <li>• Charities &amp; RCAAs only: A link to the page on the organization's website where the public portion of its most recent Registered Charity Information Return (T3010) OR RCAA Information Return (T2052), as submitted to the CRA, can be found. (The information can be presented directly on a page of the organization's website or via a direct link to the form on the CRA website).</li> </ul> | <ul style="list-style-type: none"> <li>• A link to the page on the organization's website where the most recent three years of annual reports can be found.</li> <li>• A link to the page on the organization's website where the most recent three years of financial statements—including notes as approved by the board and the report of the independent licensed public accountant who conducted the audit or review engagement—can be found.</li> <li>• A link to the page on the organization's website where the names of all board members can be found.</li> <li>• Charities &amp; RCAAs only: A link to the page on the organization's website where its registration number (BN) assigned by the Canada Revenue Agency (CRA) can be found.</li> <li>• Charities &amp; RCAAs only: A link to the page on the organization's website where the public portion of its most recent Registered Charity Information Return (T3010) OR RCAA Information Return (T2052), as submitted to the CRA, can be found. (The information can be presented directly on a page of the organization's website or via a direct link to the form on the CRA website).</li> </ul> |         |

## B11. DISCLOSURE – COMPENSATION



The organization makes information on compensation accessible to its stakeholders.  
The information contains at least the same level of detail as is required by Canada Revenue Agency (CRA) in the T3010 Registered Charity Information Return.



- A description of how the organization makes information on compensation available to the public, OR a link to the page on the organization's website where this information can be found.

## B12. DISCLOSURE – PAYMENTS TO BOARD MEMBERS



The organization discloses the purpose and amount of payments for products or services to board members or to companies in which a board member is an owner, partner or senior manager.  
The disclosure statement is posted on the organization's website.



- A link to the page on the organization's website where the disclosure statement can be found. (if applicable)



The Standards

# C. Fundraising





# Fundraising

How organizations raise funds, support donors, and establish appropriate gift policies.

## LEGEND

|                                                                                     |          |
|-------------------------------------------------------------------------------------|----------|
|  | Standard |
|  | Evidence |

|                                                                                     | LEVEL 1                                                                                                                                                                                                                                                                                                                                                    | LEVEL 2 | LEVEL 3 |
|-------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|---------|
| <b>C1. DONOR REQUESTS</b>                                                           |                                                                                                                                                                                                                                                                                                                                                            |         |         |
|    | <p>The organization honours donors' and prospective donors' requests to:</p> <ul style="list-style-type: none"> <li>• limit the frequency of contact;</li> <li>• not be contacted by telephone or other technology;</li> <li>• receive or not receive printed material concerning the organization; and</li> <li>• discontinue contact.</li> </ul>         |         |         |
|    | <ul style="list-style-type: none"> <li>• A copy of the organization's policy on donor requests.</li> </ul>                                                                                                                                                                                                                                                 |         |         |
| <b>C2. DONOR LISTS</b>                                                              |                                                                                                                                                                                                                                                                                                                                                            |         |         |
|  | <p>The organization does not sell its donor list. If it rents, exchanges or otherwise shares its donor list, it must abide by the Canadian Marketing Association Code of Ethics and Standards of Practice and honour donors' requests to be excluded from such lists.</p>                                                                                  |         |         |
|  | <ul style="list-style-type: none"> <li>• A copy of the organization's policy on donor lists.</li> </ul>                                                                                                                                                                                                                                                    |         |         |
| <b>C3. DONOR ANONYMITY</b>                                                          |                                                                                                                                                                                                                                                                                                                                                            |         |         |
|  | <p>Donors' requests to remain anonymous are honoured.</p>                                                                                                                                                                                                                                                                                                  |         |         |
|  | <ul style="list-style-type: none"> <li>• A copy of the organization's policy on donor anonymity.</li> </ul>                                                                                                                                                                                                                                                |         |         |
| <b>C4. INDEPENDENT ADVICE</b>                                                       |                                                                                                                                                                                                                                                                                                                                                            |         |         |
|  | <p>The organization encourages donors to seek independent advice if a proposed donation is a planned gift and/or the organization has any reason to believe the proposed donation might significantly impact the donor's financial position, taxable income, or relationship with other family members.</p>                                                |         |         |
|  | <ul style="list-style-type: none"> <li>• A copy of the organization's policy on independent advice.</li> </ul>                                                                                                                                                                                                                                             |         |         |
| <b>C5. RECEIPTS</b>                                                                 |                                                                                                                                                                                                                                                                                                                                                            |         |         |
|  | <p>Charities and RCAAAs: The organization prepares and issues official donation receipts for income tax purposes for monetary gifts and gifts-in-kind in compliance with all regulatory requirements.<br/>Nonprofits: The organization makes it clear to all potential donors that it cannot issue official donation receipts for income tax purposes.</p> |         |         |
|  | <ul style="list-style-type: none"> <li>• Charities &amp; RCAAAs: A copy of a void official donation receipt for income tax purposes.</li> <li>• Nonprofits: The Standards Program declaration signed by the most senior staff person and the board chair confirming that the organization is in compliance with this standard.</li> </ul>                  |         |         |

|                               | LEVEL 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | LEVEL 2 | LEVEL 3 |
|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|---------|
| C6. FUNDRAISING ACTIVITIES    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |         |         |
| ≡                             | All fundraising activities conducted by or on behalf of the organization must: <ul style="list-style-type: none"><li>• be truthful;</li><li>• accurately describe the organization's activities;</li><li>• disclose the organization's name;</li><li>• disclose the purpose for which funds are requested;</li><li>• disclose the organization's policy with respect to issuing official donation receipts for income tax purposes, including any policy on minimum amounts for which a receipt will be issued; and</li><li>• disclose, upon request, whether the individual or entity seeking donations is a volunteer, an employee or a contracted third party.</li></ul> |         |         |
| Q                             | <ul style="list-style-type: none"><li>• A copy of the organization's policy on fundraising activities.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |         |         |
| C9. FUNDRAISING MATERIALS     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |         |         |
| ≡                             | All fundraising materials distributed by or on behalf of the organization include the organization's contact information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |         |         |
| Q                             | <ul style="list-style-type: none"><li>• One or two examples of fundraising materials used by the organization.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |         |         |
| C10. PAYMENT OF FUNDRAISERS   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |         |         |
| ≡                             | Individuals who solicit donations or who manage the solicitation of donations are not paid commission, finder's fees or percentage compensation based on the value of transactions. This standard does not apply to fees charged by fundraising and social media platforms, payment card processors or similar services that charge fees based on the value of transactions.                                                                                                                                                                                                                                                                                                |         |         |
| Q                             | <ul style="list-style-type: none"><li>• A copy of the organization's policy on the payment of fundraisers.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |         |         |
| C11. BEHAVIOUR OF FUNDRAISERS |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |         |         |
| ≡                             | Anyone seeking or receiving funds on behalf of the organization—whether a volunteer, an employee or a contracted third party—must: <ul style="list-style-type: none"><li>• act with fairness, integrity, and in accordance with all applicable laws;</li><li>• cease contacting a prospective donor who states that they do not wish to be contacted;</li><li>• disclose immediately to the organization any actual or apparent conflict of interest; and</li><li>• not accept donations for purposes that are inconsistent with the organization's mission.</li></ul>                                                                                                      |         |         |
| Q                             | <ul style="list-style-type: none"><li>• A description of the steps taken to ensure that individuals who seek or receive funds on the organization's behalf adhere to this standard.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |         |         |
| C12. GIFT POLICIES            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |         |         |
| ≡                             | The organization has appropriate gift policies (e.g., a gift acceptance policy, a policy on the treatment of restricted or designated gifts, and naming and endowment policies). The relevance and appropriateness of these policies are reviewed every five years by the board or a board committee.                                                                                                                                                                                                                                                                                                                                                                       |         |         |
| Q                             | <ul style="list-style-type: none"><li>• Copies of the organization's gift policies.</li><li>• The date the board or a board committee last reviewed the organization's gift policies for relevance and appropriateness.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                           |         |         |

|                                 | LEVEL 1                                                                                                                                                                                                                                                                                                                                                                                                                           | LEVEL 2 | LEVEL 3 |
|---------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|---------|
| C13. FACE-TO-FACE SOLICITATIONS |                                                                                                                                                                                                                                                                                                                                                                                                                                   |         |         |
| ≡                               | Organizations that conduct face-to-face fundraising (e.g., door-to-door campaigns, street-side fundraising, workplace campaigns) provide verification of the fundraiser's affiliation with the organization, and ensure that any confidential information provided by donors, including credit card information, is secured and safeguarded.                                                                                      |         |         |
| Q                               | <ul style="list-style-type: none"><li>• A description of the process the organization uses to ensure that, when conducting face-to-face fundraising, fundraisers:<ol style="list-style-type: none"><li>1. provide verification of their affiliation with the organization, and</li><li>2. secure and safeguard any confidential information provided by donors, including credit card information.</li></ol></li></ul>            |         |         |
| C14. CAUSE-RELATED MARKETING    |                                                                                                                                                                                                                                                                                                                                                                                                                                   |         |         |
| ≡                               | If an organization has formally entered into a cause-related marketing agreement with a third party, it must disclose in all related materials how the organization benefits from the sale of products or services and the minimum or maximum amounts payable under the arrangement. If no minimum amount is payable, the organization should disclose this.                                                                      |         |         |
| Q                               | <ul style="list-style-type: none"><li>• One example of cause-related marketing materials in which the details of the agreement are disclosed, including:<ol style="list-style-type: none"><li>1. how the organization benefits from the sale of products or services, and</li><li>2. the minimum or maximum amounts payable under the arrangement. If no minimum amount is payable, this should be disclosed.</li></ol></li></ul> |         |         |





The Standards

# D. Staff Management

# Staff Management

How organizations recruit, orient, compensate and develop staff.

## LEGEND

|   |          |
|---|----------|
| ≡ | Standard |
| Q | Evidence |

|                                          | LEVEL 1                                                                                                                                                                                                                                                                                | LEVEL 2                                                                                                                                                                                 | LEVEL 3                                                                                                                                                                                                                                                  |
|------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>D1. HUMAN RESOURCES (HR) POLICIES</b> |                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                         |                                                                                                                                                                                                                                                          |
| ≡                                        | The organization has written HR management policies that, at minimum, comply with employment laws, human rights, health and safety laws, and other applicable legislation.                                                                                                             |                                                                                                                                                                                         |                                                                                                                                                                                                                                                          |
| Q                                        | <ul style="list-style-type: none"> <li>• A copy of the table of contents from the organization's HR management policy manual OR the list of HR policies.</li> </ul>                                                                                                                    |                                                                                                                                                                                         |                                                                                                                                                                                                                                                          |
| <b>D2. ACCESSIBILITY OF HR POLICIES</b>  |                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                         |                                                                                                                                                                                                                                                          |
| ≡                                        | The organization's HR management policies are accessible to employees.                                                                                                                                                                                                                 |                                                                                                                                                                                         |                                                                                                                                                                                                                                                          |
| Q                                        | <ul style="list-style-type: none"> <li>• A description of how the organization's HR management policies are made accessible to employees.</li> </ul>                                                                                                                                   |                                                                                                                                                                                         |                                                                                                                                                                                                                                                          |
| <b>D3. REVIEW OF HR POLICIES</b>         |                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                         |                                                                                                                                                                                                                                                          |
| ≡                                        | The organization's HR management policies are reviewed by the board, a board committee or senior staff every three years and are revised if necessary.                                                                                                                                 |                                                                                                                                                                                         |                                                                                                                                                                                                                                                          |
| Q                                        | <ul style="list-style-type: none"> <li>• A description of the process used to review and revise the organization's HR management policies.</li> <li>• The date the HR management policies were last reviewed and approved by the board, a board committee, or senior staff.</li> </ul> |                                                                                                                                                                                         |                                                                                                                                                                                                                                                          |
| <b>D4. COMPENSATION PRACTICES</b>        |                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                         |                                                                                                                                                                                                                                                          |
| ≡                                        | Not applicable                                                                                                                                                                                                                                                                         | The organization has a compensation structure that fairly evaluates and compensates the value of each position.                                                                         | The organization has a compensation structure that fairly evaluates and compensates the value of each position. The organization also has a policy that effectively implements equitable pay.                                                            |
| Q                                        | <ul style="list-style-type: none"> <li>• Not applicable</li> </ul>                                                                                                                                                                                                                     | <ul style="list-style-type: none"> <li>• A description of the compensation structure and the process used to determine the value of different positions in the organization.</li> </ul> | <ul style="list-style-type: none"> <li>• A description of the compensation structure and the process used to determine the value of different positions in the organization.</li> <li>• A copy of the organization's policy on equitable pay.</li> </ul> |



|                                               | LEVEL 1                                                                                                                                                                                                                                                                                                                       | LEVEL 2                                                                                                                                                                                                                                                                                                                                                                                                                                                        | LEVEL 3                                                                                                                                                                                                                                                                                                                                                                                                |
|-----------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| D5. JOB DESCRIPTIONS                          |                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                        |
| ≡                                             | Not applicable                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                | All employees at the organization have written job descriptions.                                                                                                                                                                                                                                                                                                                                       |
| Q                                             | <ul style="list-style-type: none"><li>• Not applicable</li></ul>                                                                                                                                                                                                                                                              | <ul style="list-style-type: none"><li>• One example of a job description currently in use.</li><li>• The Standards Program declaration signed by the most senior staff person and the board chair confirming that the organization is in compliance with this standard.</li></ul>                                                                                                                                                                              | <ul style="list-style-type: none"><li>• One example of a job description currently in use for a management position.</li><li>• One example of a job description currently in use for a non-management position.</li><li>• The Standards Program declaration signed by the most senior staff person and the board chair confirming that the organization is in compliance with this standard.</li></ul> |
| D6. RECRUITMENT AND SELECTION PROCESS         |                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                        |
| ≡                                             | Employees are recruited and selected through an objective, consistent process that, at minimum, complies with human rights legislation.                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                        |
| Q                                             | <ul style="list-style-type: none"><li>• A copy of the organization's recruitment and selection policy OR a description of the process.</li><li>• The Standards Program declaration signed by the most senior staff person and the board chair confirming that the organization is in compliance with this standard.</li></ul> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                        |
| D7. OFFERS OF EMPLOYMENT                      |                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                        |
| ≡                                             | All individuals offered a position are given a letter of employment that outlines the terms of their employment.                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                        |
| Q                                             | <ul style="list-style-type: none"><li>• A copy of a recent letter of employment (with confidential information removed).</li></ul>                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                        |
| D8. ORIENTATION AND TRAINING OF NEW EMPLOYEES |                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                        |
| ≡                                             | All employees who are new to the organization or new to their position are provided with appropriate orientation and training.                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                        |
| Q                                             | <ul style="list-style-type: none"><li>• A description of the process used to orient and train new employees.</li></ul>                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                        |
| D9. PERFORMANCE OBJECTIVES                    |                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                        |
| ≡                                             | All employees have a work plan or a set of performance objectives that identify their tasks and activities, and outline the expected results of these tasks and activities.                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                        |
| Q                                             | <ul style="list-style-type: none"><li>• One example of a current work plan OR a current set of performance objectives.</li><li>• The Standards Program declaration signed by the most senior staff person and the board chair confirming that the organization is in compliance with this standard.</li></ul>                 | <ul style="list-style-type: none"><li>• One example of a current work plan OR a current set of performance objectives for a management position.</li><li>• One example of a current work plan OR a current set of performance objectives for a non-management position.</li><li>• The Standards Program declaration signed by the most senior staff person and the board chair confirming that the organization is in compliance with this standard.</li></ul> |                                                                                                                                                                                                                                                                                                                                                                                                        |

|                             | LEVEL 1                                                                                                                                                                                                                                                                                                                                    | LEVEL 2                                                                                                                                                                                                                                                                                                          | LEVEL 3                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| D10. PERFORMANCE EVALUATION |                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| ≡                           | The performance of each employee is assessed at least once a year.                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Q                           | <ul style="list-style-type: none"><li>• A copy of an employee performance review template OR a description of how employee performance is assessed.</li><li>• The Standards Program declaration signed by the most senior staff person and the board chair confirming that the organization is in compliance with this standard.</li></ul> |                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| D11. EMPLOYEE DEVELOPMENT   |                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| ≡                           | Not applicable                                                                                                                                                                                                                                                                                                                             | The development needs of all full-time employees are reviewed at least once a year and plans are made to address any areas for improvement.                                                                                                                                                                      | The development needs of all full-time employees are reviewed at least once a year and plans are made to address any areas for improvement. Staff with responsibility for managing others are provided with opportunities to develop their supervisory skills.                                                                                                                                                                                                         |
| Q                           | <ul style="list-style-type: none"><li>• Not applicable</li></ul>                                                                                                                                                                                                                                                                           | <ul style="list-style-type: none"><li>• One example of an employee development opportunity offered in the last 12 months.</li><li>• The Standards Program declaration signed by the most senior staff person and the board chair confirming that the organization is in compliance with this standard.</li></ul> | <ul style="list-style-type: none"><li>• One example of an employee development opportunity offered in the last 12 months for a supervisory position.</li><li>• One example of an employee development opportunity offered in the last 12 months for a non-supervisory position.</li><li>• The Standards Program declaration signed by the most senior staff person and the board chair confirming that the organization is in compliance with this standard.</li></ul> |
| D12. SUCCESSION PLANNING    |                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| ≡                           | Not applicable                                                                                                                                                                                                                                                                                                                             | Critical positions in the organization are identified and succession plans are created for possible turnover of staff in these positions.                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Q                           | <ul style="list-style-type: none"><li>• Not applicable</li></ul>                                                                                                                                                                                                                                                                           | <ul style="list-style-type: none"><li>• A description of how the organization identifies critical positions and plans for succession.</li></ul>                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| D13. WORKPLACE CONFLICT     |                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| ≡                           | Not applicable                                                                                                                                                                                                                                                                                                                             | The organization has a formal process to manage workplace conflicts.                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Q                           | <ul style="list-style-type: none"><li>• Not applicable</li></ul>                                                                                                                                                                                                                                                                           | <ul style="list-style-type: none"><li>• A description of the process the organization uses to manage workplace conflicts.</li></ul>                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

The Standards

# E. Volunteer Involvement



# Volunteer Involvement

How organizations recruit, train, engage and develop volunteers.

## LEGEND

|   |          |
|---|----------|
| ≡ | Standard |
| Q | Evidence |

|                                       | LEVEL 1                                                                                                                                                                                                                                                                         | LEVEL 2                                                                                                                                                                                                                                                          | LEVEL 3 |
|---------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| E1. VOLUNTEER POLICIES AND PROCEDURES |                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                  |         |
| ≡                                     | The organization has policies and procedures in place that define and support the involvement of board and non-board volunteers. These policies are reviewed and approved by the board, a board committee or senior staff every five years.                                     |                                                                                                                                                                                                                                                                  |         |
| Q                                     | <ul style="list-style-type: none"><li>• Copies of the policies and procedures relating to volunteer involvement for board and non-board volunteers.</li><li>• The date the policies were last reviewed and approved by the board, a board committee, or senior staff.</li></ul> |                                                                                                                                                                                                                                                                  |         |
| E2. VOLUNTEER OVERSIGHT               |                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                  |         |
| ≡                                     | The organization has at least one individual who is responsible for volunteer involvement.                                                                                                                                                                                      | The organization has one or more clearly designated individuals (volunteer or paid staff) with appropriate experience, skills, or qualifications who is/are responsible for volunteer involvement.                                                               |         |
| Q                                     | <ul style="list-style-type: none"><li>• The title of the individual responsible for volunteer involvement.</li></ul>                                                                                                                                                            | <ul style="list-style-type: none"><li>• The title(s) of the individual(s) responsible for volunteer involvement.</li><li>• A description of the experience, skills, or qualifications held by the individual(s) responsible for volunteer involvement.</li></ul> |         |
| E3. VOLUNTEER ASSIGNMENTS             |                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                  |         |
| ≡                                     | Volunteer assignments relate to the mission or purpose of the organization and involve volunteers in meaningful ways that reflect their abilities, needs, and backgrounds.                                                                                                      |                                                                                                                                                                                                                                                                  |         |
| Q                                     | <ul style="list-style-type: none"><li>• A description of two volunteer assignments, including how each volunteer assignment relates to the organization's mission or purpose.</li></ul>                                                                                         |                                                                                                                                                                                                                                                                  |         |
| E4. VOLUNTEER RECRUITMENT             |                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                  |         |
| ≡                                     | Not applicable                                                                                                                                                                                                                                                                  | Volunteer recruitment incorporates internal and external strategies to reach out to a diverse base of board and non-board volunteers.                                                                                                                            |         |
| Q                                     | <ul style="list-style-type: none"><li>• Not applicable</li></ul>                                                                                                                                                                                                                | <ul style="list-style-type: none"><li>• A description of the process used to recruit board volunteers.</li><li>• A description of the process used to recruit non-board volunteers.</li></ul>                                                                    |         |

|                                                 | LEVEL 1                                                                                                                                                                                                                   | LEVEL 2                                                                                                                                                      | LEVEL 3 |
|-------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| <b>E5. VOLUNTEER SCREENING</b>                  |                                                                                                                                                                                                                           |                                                                                                                                                              |         |
| ≡                                               | The organization has appropriate processes for screening board and non-board volunteers.                                                                                                                                  |                                                                                                                                                              |         |
| Q                                               | <ul style="list-style-type: none"> <li>• A description of the process used to screen board volunteers.</li> <li>• A description of the process used to screen non-board volunteers.</li> </ul>                            |                                                                                                                                                              |         |
| <b>E6. VOLUNTEER ORIENTATION AND TRAINING</b>   |                                                                                                                                                                                                                           |                                                                                                                                                              |         |
| ≡                                               | Non-board volunteers are provided with appropriate orientation to the organization and its policies and practices. Non-board volunteers receive training appropriate to their roles and needs.                            |                                                                                                                                                              |         |
| Q                                               | <ul style="list-style-type: none"> <li>• A description of the process used to orient and train new non-board volunteers.</li> </ul>                                                                                       |                                                                                                                                                              |         |
| <b>E7. VOLUNTEER ENGAGEMENT AND SUPERVISION</b> |                                                                                                                                                                                                                           |                                                                                                                                                              |         |
| ≡                                               | All non-board volunteers are given regular opportunities to offer and receive feedback. Non-board volunteers who are engaged in delivering programs or services receive a level of supervision appropriate to their role. |                                                                                                                                                              |         |
| Q                                               | <ul style="list-style-type: none"> <li>• A description of the feedback mechanisms used with non-board volunteers.</li> <li>• A description of how non-board volunteers are supervised.</li> </ul>                         |                                                                                                                                                              |         |
| <b>E8. VOLUNTEER RECOGNITION</b>                |                                                                                                                                                                                                                           |                                                                                                                                                              |         |
| ≡                                               | The contributions of volunteers are acknowledged and recognized.                                                                                                                                                          |                                                                                                                                                              |         |
| Q                                               | <ul style="list-style-type: none"> <li>• A description of how the contributions of volunteers are acknowledged and recognized.</li> </ul>                                                                                 |                                                                                                                                                              |         |
| <b>E9. VOLUNTEER EVALUATION</b>                 |                                                                                                                                                                                                                           |                                                                                                                                                              |         |
| ≡                                               | Not applicable                                                                                                                                                                                                            | The impact and contributions of volunteers and the volunteer program are regularly evaluated.                                                                |         |
| Q                                               | <ul style="list-style-type: none"> <li>• Not applicable</li> </ul>                                                                                                                                                        | <ul style="list-style-type: none"> <li>• A description of how the contributions and impact of volunteers and the volunteer program are evaluated.</li> </ul> |         |







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