

GUIDELINES FOR FUNDRAISING FOR MEMBERS OF COUNCIL
DISCLOSURE GUIDELINES
Office of the Councillors

1. Purpose of the *Guidelines for Fundraising For Members of Council* Disclosure Guidelines (the “Disclosure Guidelines”)

- a) Subsequent to the *Guidelines for Fundraising for Members of Council* (PFC2017-0426), the purpose of the Disclosure Guidelines is to confirm when and where Fundraising activities supporting a Third Party be disclosed.

2. Disclosure

- a) To be in compliance with the *Guidelines for Fundraising For Members of Council* (PFC2017-0426), Section 6.1, *Disclosure*, all Members of Council must ensure the following is disclosed for each Fundraising activity undertaken that is in support of a Third Party:
- i) the name(s) of the event(s) organized in a calendar year;
 - ii) name(s) of Third Parties;
 - iii) Donors who directly provided Donations to a Member of Council;
 - iv) total amount of Donations directly received by a Member of Council, with an estimate of in-kind Donations;
 - v) total amount of expenditures by a Member of Council to organize an event, if applicable;
 - vi) total amount of Donations provided by the Member of Council to each Third Party;
 - vii) any operational surplus funds carried over to the following calendar year, if applicable; and
 - viii) total amount of Donations solicited regardless of whether the Member of Council directly received the Donation or not. This Council policy does not supersede the Council policy on *Indemnification of Members of City Council* (CC010).
- b) In the case whereby Donations collected are in the form of ticket sales to a Fundraising event, then the following information must be disclosed and could replace the disclosure requirement to disclose “Donors who directly provided Donations to a Member of Council”, if such information is not available during the time of the ticket sales:
- i) the price per ticket for the event(s);
 - ii) the number of tickets available for sale for the event(s);
 - iii) the number of tickets sold for the event(s); and
 - iv) the total revenue received for the event(s).

The remainder of the information required for disclosure in the Disclosure Guidelines, Section 2 a) must also be disclosed.

- c) The Manager, Office of the Councillors will provide Councillors a standardized form (the "Disclosure Statement") to be used by all Councillors when disclosing event(s) outlined in the Disclosure Guidelines (see "**Attachment 1**").
- d) A separate Disclosure Statement must be completed for each Fundraising event.
- e) The Manager, Office of the Councillors will ensure the Disclosure Statement for each Ward office be posted on calgary.ca is posted on a quarterly basis.

3. Communicating the Disclosure Guidelines

- a) The Manager, Office of the Councillors shall notify, by email or some other means, the Disclosure Guidelines, or any subsequent updates, to all Members of Council, which includes the Mayor and Councillors.
- b) The City of Calgary internet site will be used to post the Disclosure Statement for each Ward office that has Fundraising activities.
- c) An annual archive of all Disclosure Statements must remain for the duration of a Member of Council's term plus one year, after which time, the Manager, Office of the Councillors shall remove all archived copies from The City of Calgary internet site.

4. Disclosure Guidelines Review

- a) The Disclosure Guidelines should be reviewed by the Coordinating Committee of the Councillors Office ("CCCO") or the Ethics Advisor on an annual basis to ensure the Disclosure Guidelines are in compliance with the *Guidelines for Fundraising for Members of Council*.
- b) Any updates to the Disclosure Guidelines must be approved by CCCO prior to coming into effect.
- c) The Manager, Office of the Councillors is authorized to update the Disclosure Statement in order to ensure compliance with *Guidelines for Fundraising For Members of Council* and does not require CCCO approval to do so.
- d) Any updates to the Disclosure Guidelines, once approved, or to the Disclosure Statement must be circulated to Councillors by the Manager, Office of the Councillors, with a copy of the same notification being shared with the Chief of Staff, Mayor's Office.

Effective: [June 12], 2019

**GUIDELINES FOR FUNDRAISING FOR MEMBERS OF COUNCIL
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Attachment 1

GUIDELINES FOR FUNDRAISING FOR MEMBERS OF COUNCIL (PFC2017-0426)

**OFFICE OF THE COUNCILLORS
DISCLOSURE STATEMENT**

Councillor: _____
Ward: _____
Name of the Fundraising event: _____
Date of the Fundraising event: _____
Name of the Third Party: _____

Donations Received and Revenues Generated by Member of Council				
Donor name or Type of revenue generated (ex. ticket or raffle sales)	Description of donation, other than cash*. Provide number of event or raffle tickets sold, as applicable.	Amount of donation (\$)	Estimated amount of in- kind donation *	Amount of ticket sales (\$)
		\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -
		\$ -	\$ -	\$ -
<i>Total amount of Donations directly received by a Member of Council</i>				\$ -
Expenditures Paid by Member of Council				
Date of expenditure	Description of expenditure	Amount of expenditure (\$)		
		\$ -		
		\$ -		
		\$ -		
		\$ -		
<i>Total amount of expenditures paid by a Member of Council</i>				\$ -
Event Surplus				
<i>Total amount of surplus (Donations - expenditures)</i>				\$ -
Distribution/Allocation of Event Surplus				
If an event surplus exists, then:				
The amount carried forward for <u>operational purposes</u> as per the <i>Fundraising Guidelines for Member of Council</i>				\$ -
The amount of money distributed to a Third Party, namely:				
Name of the Third Party receiving funds:	_____	Amount:	\$	-
Name of the Third Party receiving funds:	_____	Amount:	\$	-
Name of the Third Party receiving funds:	_____	Amount:	\$	-
Name of the Third Party receiving funds:	_____	Amount:	\$	-