



## CHARITY VETTING GUIDELINES (Revised Nov 25th, 6pm)

### **Phase 1: Nominations From Members Qualifying Process**

1. Nominations can only be made by Members in Good Standing.
2. Nominations must be received by the deadline.
3. Email will be (automatically) sent to nominating member thanking them for the nomination.
- 4. Charity must be based in Mississauga (Mississauga address).**
- 5. Charity must serve the Mississauga community.**
- 6. Charity must have an immediate and specific need (not just for general overhead).**
- 7. Charity must have a distinct Charitable Registration Number in it's own name, independent from other associated charities.**
8. Must have the name of a contact person at the charity,
9. If a charity does not qualify, the nominating member will be contacted via email to say thank you and explain disqualification.
10. Charity Application forms will be emailed to all qualifying nominees to begin Phase 2, and follow-up phone calls will be made.

### **Phase 2: Charity Application Form Vetting**

1. Application Form must be received by the deadline.
2. Email will be sent to the charity thanking them for sending the application
3. Application must Identify an immediate and specific need.
4. Charity must agree to provide individual tax receipts to all members.
5. Charity must agree NOT to add members to mailing lists.
6. Charity must provide an e-transfer link for donations, ideally an exclusive link for tracking purposes.
7. The Percentage of Donations Received that Support Admin Costs must be LOWER THAN 35%\*.
8. If listed in CharityIntelligenceCanada.ca\*, the charity must have a 4★ or 5★ rating.
9. If any red flags are raised at this stage, we will contact the charity for more information.
10. Charities will be emailed to inform them if they will be moving to the next phase. If not, a reason will be given.

### **Phase 3: Random Selection of 3 Charities for Giving Circle**

1. Charities will be selected from Wheelofnames.com randomizer during a recorded video.
2. Charities receive one spot on the wheel for each nomination they receive (so multiple nominations will receive multiple spots).
3. Selected charities will be notified via email and sent presentation guidelines. The charities not selected will be emailed thanking them for their application and advising them they are still eligible for nomination at future Giving Circle Meeting.
4. The selected charities must agree to have a representative present (5 mins max) at the Giving Circle Meeting to present their need and answer any questions. The representatives must be present for the entire meeting. If they can not have a representative present, another charity will be chosen.
5. Recording of randomized selection will be posted on social media and all Members will be notified via email, including links to the three charities so members can research beforehand if they choose.

### **Other Vetting Guidelines:**

- Charities must be inclusive and not exclude on the basis of religion, race, or sexual or gender orientation.
- Following the generally accepted model of the 100 Who Care Alliance, we do not support religious institutions or political organizations. If a religious institution has a separate community outreach program that has its own, separate Charitable Registration Number, it will be eligible for consideration.
- When considering Percentage of Donations Received that Support Admin Costs, we follow the guidelines established by [CharityIntelligenceCanada.ca](http://CharityIntelligenceCanada.ca), an independent charity rating organization, which states "if overhead costs are...above 35%, there is concern that the charity may not be operating effectively." Click on the link to find out more.
- For charities not rated by Charity Intelligence Canada, we follow the guidelines they use as much as possible.