

TITLE	APPROVING BODY
<b>Policy – Donations and sponsorships</b>	Board of Directors
ISSUING BUSINESS UNIT	DATE
EVP Public Affairs	2021-09-30

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**RELATED LEGISLATION, POLICIES AND DIRECTIVES**

None

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**OBJECTIVES**

- Identify CDPQ's priority sectors and the process for allocating donations and sponsorships.
- Set out eligibility, evaluation and exclusion criteria for requests.

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## 1. General framework

CDPQ's philanthropic activity in Québec is based on its desire to provide relevant and lasting assistance by investing in the community. By offering financial support, in the form of a donation or a sponsorship, CDPQ takes an approach based on its vision of being a source of constructive capital built upon its fundamental values of ethics and rigour, and on the expertise of its teams.

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## 2. Guiding Principles

- CDPQ focuses its philanthropic activity on solving existing social challenges.
- CDPQ seeks to play a uniting role by rallying employees, organizations and the business community and by building lasting partnerships.
- It's philanthropic activities are not limited to a financial contribution in the form of a donation or sponsorship. It can also include partnerships and sharing financial or organizational resource, as well as sharing knowledge and CDPQ's networks. It also accounts for the organization's business priorities.
- The goal of sponsorships is to contribute to the vitality of the business community while extending the reach of CDPQ's areas of expertise.

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## 3. Priority sectors

### 3.1 Philanthropy

CDPQ pursues its philanthropic activities in the four following priority sectors:

**The community**, with particular focus on:

- The fight against poverty
- School perseverance
- Access to culture

**Health**, with a particular focus on:

- Research
- Technological innovation

**The fight against climate change**, with a particular focus on:

- Reducing greenhouse gases and adapting to the impact of climate change

**Academics**, with a particular focus on:

- Research chairs or bursaries aligned with CDPQ's business priorities
- The outreach of universities

### 3.2 Sponsorships

CDPQ supports initiatives that raise awareness on its areas of expertise:

- We work alongside numerous associations, primarily in the fields of finance and economics.
- We primarily support initiatives, events or projects that are aligned with our business priorities.

## 4. Criteria for evaluating requests

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CDPQ supports a limited number of initiatives that are subject to prior analysis that takes into account the priority sectors set out in section 3 of this policy or other sectors that are compatible with its mission.

In its analysis, CDPQ will prioritize the project that, in addition to being included in its priority sectors, meet one or more of the following criteria:

#### **Diversity and inclusion**

- Contribute to building stronger communities and inclusive neighbourhoods, and promote equal opportunity.

#### **Environmentally responsible practices**

- Contribute to sustainable development, the fight against climate change and the conversation on the environment.

#### **Innovation**

- Develop innovative practices to facilitate the resolution of problems communities face.

#### **Lasting partnerships**

- Facilitate initiatives that encourage long-term philanthropic collaboration between organizations and business partners.

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*Date of initial approval: 2004-08*

*Dates revised: 2011-11, 2013-02-26, 2016-04-01, 2016-12-09, 2019-12-11, 2021-09-30*

## 5. Exclusions

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Donations and sponsorships will not be considered for the following:

- Public or private elementary, secondary or college-level educational organizations
- Sports, religious or political organizations
- Organizations having already received financial support from CDPQ in the same year, unless more than one event is stipulated in a partnership agreement
- Organizations requesting a renewal of their donation or sponsorship for the same project after a three-year agreement
- A union

Donations and sponsorships will not be considered for the following:

- International missions
- Design, construction or renovation of buildings
- Writing or creating a website
- In memoriam donations
- Related to student life or organized by a student association
- Personal

## 6. Eligibility criteria

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For a donation application to be considered by CDPQ, the requesting organization must:

- Be duly registered as a non-profit organization
- Possess financial statements in due form
- Have a clearly defined mission and objectives
- Possess a solid governance structure

For a sponsorship request to be considered by CDPQ, the requesting organization must:

- Possess financial statements in due form
- Have a clearly defined mission and objectives
- Possess a solid governance structure

## 7. Process for analyzing requests

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The process for analyzing requests includes the following steps:

### 7.1 Request

- If the requesting organization's philanthropic project or sponsorship is in one of the priority sectors, the requesting organization must fill out the online request at:  
**<https://www.cdpq.com/en/contact-us/request-donations-sponsorships>**
- The request must be submitted at least 60 days prior to the activity in question, if applicable.

### 7.2 Analysis and approval

- Requests are analyzed in accordance with the priority sectors and evaluation criteria set out in the policy.
- At any point in the analysis, the Donations and Sponsorships Committee may request additional information in order to prepare its recommendations, in accordance with the policy rules and available financial resources.
- Analyzed requests are submitted to a committee for approval. A second level of approval may be necessary based on the nature of the donation or sponsorship request. In such a case, the request is submitted to a second-level approval committee.
- Unless otherwise stated, the funds disbursed as part of this policy must be used in the year for which they were allocated.
- The awarding of a donation or sponsorship by CDPQ to an organization in a given sector does not oblige it to support other organizations in the same sector.
- Donations and sponsorships are never renewed automatically.
- All renewal requests are subject to a new analysis.

### 7.3 Response to the requesting organization

A written response stating CDPQ's decision is sent to the requesting organization within 30 business days of receipt of the request.

### 7.4 Agreement

All approved requests are subject to an agreement co-signed by CDPQ and the organization in question.

If the agreement is for more than one year, it will have a maximum duration of three years. If the requesting organization wishes to make a new request following an initial three-year agreement, the request should be for a different project or program than the one covered by the initial agreement.

## 7.5 Monitoring

Based on the terms of the agreement, CDPQ could require a report on the use of the funds or a presentation of the project's impact.

## 8. Other types of contributions

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To encourage active participation and volunteering of its employees, CDPQ may also support organization with which its employees work through other relevant programs. Eligible organizations must comply with the criteria in this policy and not be subject to any inclusions contained in it.

The directive covering a donation of IT equipment is governed by CDPQ's Sustainable Development Action Plan.

## 9. Responsibility

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The EVP, Public Affairs, is responsible for the management of CDPQ's donations and sponsorships.

## 10. Budget

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The annual budget is approved by the Board of Directors.

The EVP, Public Affairs reports annually to the Governance and Ethics Committee on how this budget has been used.

## 11. Review

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This Directive must be reviewed at least every three years.

## 12. Distribution of the policy

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This policy is available on CDPQ's website at [cdpq.com](http://cdpq.com).