

The Do's Of Poppy Trust Funds

401. Poppy Funds are made available through the generosity of the Canadian public and are part of the public trust between Canadians and the Legion. To safeguard this bond, Poppy Funds must be held in trust at each level of the organization. They may not be used as general funds. Trust funds are to be used for the following purposes only:

- a. the basic purpose and obligations of the Poppy Trust Fund are to assist the following:
 - i. Any person who is serving or who has honourably served in the Canadian Forces, and their families, who are in need of assistance;
 - ii. Merchant Navy personnel who are eligible for and who have been awarded campaign stars or decorations, and their families, who are in need of assistance;
 - iii. ex-service personnel of Commonwealth countries who reside in Canada, and their families, who are in need of assistance; and
 - iv. ex-service personnel of allied countries who reside in Canada, and their families, who are in need of assistance. Also, refer to Subsection 501.b of this manual.
- b. funding of the 2 Minutes Wave of Silence program at all levels of the Legion;
- c. reasonable expenses of the Provincial Command and the Branch Service Officer that are directly related to service work;
- d. the award of bursaries to students who are children, grandchildren or great-grandchildren of any of the personnel as identified in Subsection 401.a. who are in need of assistance. Bursaries may be awarded at any stage of a college or university program. Poppy Trust Funds may also be donated to a centralized Command bursary fund;
- e. the purchase of Poppies, wreaths, canvassing supplies and promotional material for the annual Poppy Campaign;
- f. predetermined storage costs for Poppies, wreaths, canvassing supplies and promotional material (refer to your Provincial Command for guidance on rental space and compensation limitations, see Section 319 of this Poppy Manual);

'Families' is defined as current spouse and dependant children.



The funds may only be used for emergency assistance, which is defined as shelter, food, fuel, clothing, prescription medicine and necessary transportation.

Assistance cannot be continued over an extended period but may be offered more than once to an individual.



A bursary is given for need, unlike a scholarship, which is awarded for scholastic achievement.



- g. reasonable local administrative costs associated with the Poppy Campaign. These local costs are those directly related to the campaign such as telephone charges, coin wrappers, postage, stationary, advertising, bank charges as well as refreshments and light lunches for canvassers and/or volunteers (defined as coffee, juice, soup, sandwiches or donuts). Other administrative costs of a similar nature may be considered;
- h. distribution of Poppy and Remembrance material, as authorized by Dominion Command to be used in schools;
- i. reimbursement of reasonable expenses incurred by the Poppy and Remembrance Chairman or, if required expenses for his/her replacement to attend Poppy and Remembrance seminars;
- j. reasonable expenses incurred for the required external audit of Command/Branch Poppy Trust Funds. For branches that do not have an external audit but pay a bookkeeping agency to maintain the branch accounts, Poppy Trust Funds are authorized for this service but are limited to the percentage of work attributed to the Poppy Trust Fund account only and not on other or general accounts;
- k. prizes for Literary and Poster Contests; and
- l. personal comforts for Veterans and their widows/widowers who are hospitalized, in long term care facilities, in a nursing home or who are incapacitated and are being cared for at home. These comforts are defined as food items (confectioneries, fruits, sweets, etc.), reading material, flowers, personal toiletry items, writing materials, postage and short-term TV rental. Other costs of a similar nature may be considered.

SPECIAL USE EXPENDITURES

402. Poppy Trust Funds may be expended for "special uses" as follows:

- a. for all Special Use Expenditures outlined in this article, with the exception of Subsection 402.i., branches are limited by the maximum allotment that may be made each year from Poppy Trust Funds as specified in each article rather than by the frequency of funds given. For example, the allotment allowed under Subsection 402.h. may be made in one donation or divided into smaller, multiple donations as long as the total given in a year does not exceed the original allotment authorized; See Section 603 for approval process;
- b. in accordance with Subsection 130.b. of the General By-Laws, the financial year for Poppy Funds shall commence on the first day of October in each year and terminate on the thirtieth day (30th) September the

Application for special use of Poppy Trust Funds must be submitted to Provincial Command Offices for approval.



following year. References to “annual” or “yearly” basis refer to this timeframe;

- c. it is a condition of any such special use expenditures of Poppy Trust Funds that, prior to any Poppy Campaign in which such funds might be collected, notice be given to the public that a portion of the monies then collected might be used for such purposes.
It is a further mandatory condition of any such special use expenditures that provision shall have been made for Veterans and their families to receive priority in the use of such housing accommodations or care facilities;
- d. **Housing Accommodation or Care Facilities:** Subject to prior approval by Provincial Command, a district, zone, branch or group of branches may make an allotment not exceeding 50 percent of the balance in a Poppy Trust Fund on the thirtieth day (30th) September in the Poppy year preceding the expenditure, to purchase, construct, repair or furnish housing accommodation and care facilities, including hospital wards/rooms for elderly or disabled persons. The 50 percent limit does not apply to a registered veteran’s organization whose aims and objectives are for providing accommodation or care facilities for Veterans and dependants;
- e. **Ex-service Personnel of Commonwealth or Allied Countries and their families:** Subject to prior approval by Provincial Command, a district, zone, branch or group of branches may make an allotment not exceeding 25 percent of the balance in a Poppy Trust Fund on the date prior approval is requested preceding the expenditure, for the purpose of assisting ex-service personnel of Commonwealth or allied countries and their families who reside outside of Canada and are in need;
- f. **Medical Training and Medical Research:** Subject to prior approval by Provincial Command, a district, zone, branch or group of branches may make an allotment not exceeding 50 percent of the total available in a Poppy Trust Fund on the date prior approval is requested preceding the expenditure for medical training and medical research directed to geriatric and other veteran support, or for community medical appliances such as “jaws of life”, photo imaging cameras and defibrillators which will assist in the care of Veterans;

- g. **Senior Services:** Subject to prior approval by Provincial Command, a district, zone, branch or group of branches may make an allotment not exceeding 50 percent of the total available in a Poppy Trust Fund on the date prior approval is requested preceding the expenditure for support of drop-in centres for the elderly and support of meals on wheels services only as long as these provide known support of Veterans in the community;
- h. **Relief of Disasters:** Subject to prior approval by Provincial Command, a district, zone, branch or group of branches may make an allotment not exceeding 50 percent of the total available in a Poppy Trust Fund on the date prior approval is requested preceding the expenditure for donations for relief of disasters declared by the federal or provincial governments;
- i. **Transportation:** Subject to prior approval by Provincial Command, a district, zone, branch or group of branches may make an allotment not exceeding 50 percent of the total available in a Poppy Trust Fund on the date prior approval is requested preceding the expenditure for occasional day trips for veterans—also see Subsection 402.1.;
- j. **Monuments:** A Command, or, subject to the prior approval of the Provincial Command, a district, zone, branch or group of branches, may, for the purpose of constructing, maintaining or preserving local monuments to veterans, expend a portion of the monies in its Poppy Trust Fund, not exceeding 25 percent of the total available in the account on the thirtieth (30th) day of September in the year preceding the expenditure, provided that the 25 percent does not exceed 50 percent of the total funds required to construct, maintain or preserve local monuments for which funds are allocated;
- k. **Support of Cadet Units:** Subject to prior approval by Provincial Command, a branch may make an **allotment** up to 20 percent of the balance in its Poppy Trust Fund on the thirtieth day (30th) September in the year preceding the expenditure to support and encourage Cadet Units that have assisted the branch with the Poppy Campaign or other Remembrance activities;

Cadet units are defined as Sea Cadets, Army Cadets, and Air Cadets.

An allotment would be for assistance to Cadet units, not reimbursements for individual expenses.



- l. Annual Veterans Visit:** Subject to prior approval by Provincial Command, Poppy Trust Funds may be used once a year to provide an annual visit to branches both for the Veterans who are Legion members and those Veterans in the local community, to offer a meal and camaraderie. Up to \$18.00 per meal is authorized from Poppy Trust Funds to cover the cost of the meal only and must not include the cost of any alcoholic beverages or other services, such as entertainment.

Furthermore, subject to prior approval by Provincial Command, Poppy Trust Funds may be used once a year to cover the cost of reasonable transportation expenses to transport the local Veterans to the local branch—also see Subsection 402.i.;

- m. Accessibility Modification:** A Command, or, subject to the prior approval of the Provincial Command, a district, zone, branch or group of branches may make an allotment not exceeding 50 percent of the balance in a Poppy Trust Fund on the thirtieth day (30th) of September in the Poppy Year preceding the expenditure, to cover the cost of installation, maintenance and repair to personal lifting devices installed in branches for the purpose of assisting Veterans, their families and other persons with disabilities.

Furthermore, subject to prior approval by Provincial Command, branches are authorized to use Poppy Trust Funds to provide accessibility to the branch itself by Veterans, their families and other persons with disabilities through the installation of an access ramp to the branch entrance and by installing or retrofitting the branch's main entrance with a handicap door operator. If necessary, funding for a replacement door in this instance only is also authorized.

In addition, subject to the prior approval of the Provincial Command, a district, zone, branch or group of branches may make an allotment not exceeding 50 percent of the balance in the Poppy Trust Fund on the thirtieth (30th) day of September in the Poppy Year preceding the expenditure, to cover the cost of installation of a washroom door, toilet and sink for the purpose of assisting Veterans, their families and other persons with disabilities;

- n. Call to Remembrance Program:** Subject to prior approval by Provincial Command, a district, zone, branch or group of branches may make an allotment not exceeding 10 percent of the balance in a Poppy Trust Fund on the thirtieth day (30th) September in the Poppy year preceding the expenditure for the purpose of supporting the Call to Remembrance Program;
- o. Coin Sorting Machine:** Subject to prior approval by Provincial Command, Poppy Trust Funds may be used to purchase a coin counting/sorting/wrapping machine for use in supporting the annual Poppy Campaign. Approved funds will be limited to a maximum of 10 percent of the cost of the machine;
- p. Veterans' Reading Program:** A Command or, subject to prior approval by the Provincial Command, district, zone, branch or group of branches may, for the purpose of funding a Veterans' Reading Program for students, expend a portion of the monies in its Poppy Trust Fund not exceeding 5 percent of the surplus funds after all expenses are paid for as of the thirtieth (30th) day of September in the year preceding the expenditure;
- q. Canadian Military Family Resource Centres:** A Command, or, subject to prior approval of the Provincial Command, a district, zone, branch or group of branches may, for the purposes of supporting Canadian Military Family Resource Centres, expend a portion of the monies in its Poppy Trust Fund not exceeding 10 percent of the balance in the Poppy Trust Fund on the thirtieth (30th) day of September in the Poppy Year preceding the expenditure for site specific, non-funded programs;
- i. the Provincial Command's prior approval shall be requested in writing. The request is to contain – the amount, the intended recipient(s), the amount of funds held in trust at the time the request is made, the purpose of the request and the date of the General Meeting at which the decision to request approval was taken;
 - ii. prior to any Poppy Campaign during which funds for these purposes will be collected, notice must be given to the public that a portion of the funds collected may be used for the above purposes; and
 - iii. Poppy Trust Funds may be donated to Provincial Command Charitable Foundations provided they are organized for the purposes outlined above.

Should a circumstance arise that is not addressed, advice from Provincial Command must be sought.

- r. **Veterans Transition Programs:** A Command or, subject to prior approval of the Provincial Command, a district, zone, branch or group of branches may, for the purpose of funding Veterans Transition Programs partnered with registered institutions that are directly related to the training, education and support needs of Veterans, make an allotment not exceeding 50 percent of the balance in the Poppy Trust Fund on the thirtieth (30th) day of September in the Poppy Year preceding the expenditure.

403. Poppy Trust Funds are made available through the generosity of the Canadian public and consequently they are part of the public trust between Canadians and the Legion. Credibility and public support are enhanced when funds are used in the correct and proper manner.

The Don'ts Of Poppy Trust Funds

501. The following expenditures are not authorized:

- a. assistance to associate members unless these persons are residing with their parents, they are wholly dependent upon them for support and they are not receiving welfare assistance, a pension from any government source, or funds from employment insurance, or similar government program (there are few, if any, associate members who meet this criteria);
- b. assistance to affiliate members;. Also refer to Sub-subsection 401.a.iv. of this manual;
- c. expenses incurred for Remembrance Day ceremonies and Decoration Day ceremonies;
- d. the purchase of floral tributes or wreaths for deceased Veterans or their families;
- e. payment for funerals or miscellaneous funeral home expenses;
- f. the payment for the service of a bugler/piper at the funeral of Veterans;
- g. lunches or refreshments related to the funeral of Veterans;
- h. hot meals and alcohol-based beverages for Poppy Campaign organizers, workers and volunteers;
- i. the purchase of cemetery plots, flag-poles and accessories;
- j. the purchase of headstones, grave markers, memorial plaques for cenotaphs and honour roll plaques for schools;
- k. the payment of property taxes for Veterans;
- l. the money for death benefit funds at branches;
- m. home care, housekeeping services or grounds keeping, such as grass cutting, leaf raking, snow removal, etc.;
- n. donations to community events, schools, youth groups, public speaking events or Legion oriented programs;
- o. the purchase of equipment for showing Remembrance films;
- p. the provision of loans;
- q. the funding of scholarships;
- r. any expenses incurred at conventions;
- s. renovations of any sort to branch premises except as outlined in Subsection 402.m.;
- t. general or non-specific donations to charities, registered or non-registered, that do not meet the criteria listed in Sections 401 or 402 of this manual;

Note: To conclude the discussion addressing the list of prohibitions outlined above, the expenditure of Poppy Trust Funds on any of these activities is prohibited. When in doubt, contact your Provincial Command.



- u. the installation of public address systems at cenotaphs;
- v. the purchase of comforts for senior citizens in hospitals or nursing homes that do not meet the criteria listed in Sections 401 or 402 of this manual;
- w. public service projects such as donations to churches, memorial funds, recreational facilities, furnishings and non-medical equipment for hospital wards/rooms; and
- x. the purchase of war medals.

CHAPTER 6

Control Of Poppy Trust Funds

POPPY TRUST FUND COMMITTEE

601.

- a. Each branch shall establish a Poppy Trust Fund Committee. Although this Committee has responsibility for accounting, disbursing and reporting the status of the Poppy Trust Fund, it is responsible to the members of the branch. Poppy Trust Funds are Public Funds which are held in trust and the branch is responsible for this function; and
- b. Poppy Trust Funds may be distributed only as authorized by Article XI of the General By-Laws and as amplified by this manual. All decisions related to the control and distribution of Poppy Trust Funds must remain within the jurisdiction of The Royal Canadian Legion through designated Legion members only.

GRANTS AND BURSARIES

602. The Committee shall report expenditures and disbursements at General Meetings of the branch as follows:

- a. the total amount of funds provided to individuals and the number of individuals shall be reported however, the names of specific recipients are not to be reported without the written consent of the recipients, and/or their parents and/or guardians, as applicable;
- b. the total amount of funds and the number of individuals who received a bursary shall be reported; however, the names of recipients are not to be reported without the expressed written consent of the recipients and/or their parents and/or guardians, as applicable; and
- c. Provincial Commands that receive funds for bursaries from Dominion Command shall report expenditures as defined by Dominion Command from time to time.

SPECIAL USE PURPOSES

603. When it is proposed that funds be utilized for “special uses”, as allowed for in Sections 1105 — 1116 inclusive of the General By-Laws, the Branch Poppy Trust Fund Committee is to seek approval for the proposed expenditure at a general meeting of the branch. The date of the general meeting and the motion recommending the expenditure are to be included in the request for approval forwarded to the applicable Provincial Command. A sample application form is included at Annex B of this manual.