

<b>POLICY MANUAL: FOUNDATION - FUNDRAISING</b>		<b>POLICY: NEW</b>
<b>Heading:</b>	<b>Subject:</b>	<b>Page: 1 of 2</b>
<b>Niagara Peninsula Conservation Foundation</b>	<b>Donor Bill of Rights Policy</b>	<b>Date Approved:</b> <b>September 6<sup>th</sup>, 2018</b>
		<b>Replaces: N/A</b>
<b>APPROVAL:</b>  _____		<b>DATE TO BE REVIEWED:</b>  <b>EVERY FOUR YEARS</b>

**PREAMBLE:**

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect, trust of the general public, and that donors and prospective donors can have full confidence in not-for-profit organizations and causes they are asked to support, we believe that all donors have the following rights.

**STATEMENT:**

1. To be informed of the Foundation’s mission, the way the Foundation intends to use donated resources, and its capacity to use donations effectively for its intended purposes.
2. To be informed of the identity of those serving on the Foundation’s governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
3. To have access to the Foundation’s most recent financial statements and annual report.
4. To be assured their gifts will be used for the purposes for which they were given.
5. To be assured that information about their donations is handled with respect and confidentiality to the extent provided by law and to have the right to see their donor record and challenge its accuracy.
6. To receive appropriate acknowledgement and recognition and, if requested by the donor, to remain anonymous.
7. To expect that all relationships with individuals representing the Foundation will be professional in nature.
8. To be informed whether those seeking donations are volunteers, employees of the Foundation or hired solicitors.
9. To have the opportunity for their names to be deleted from mailing lists that the Foundation may intend to share.
10. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.
11. To receive an official receipt for income tax purposes within 30 days for the amount of the donation and for non-monetary eligible gifts (or gifts-in-kind) to receive an official receipt that reflects the fair market value of the gift.

POLICY MANUAL: FOUNDATION - GOVERNANCE		POLICY: NEW
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12. To receive, upon request, the Foundation's registration number as assigned by Revenue Canada, any information contained in the public portion of the Foundation's most recent Foundation Information Return as submitted to Revenue Canada and a copy of the *Donors' Rights Policy*.
13. To be encouraged to seek independent advice if the Foundation has any reason to believe that a proposed gift might significantly affect the donor's financial position, taxable income, or relationship with other family members.
14. To receive a timely response from either a designated staff member or volunteer to a complaint by a donor or prospective donor about any matter that is addressed in this *Donor's Rights Policy*. A complainant who remains dissatisfied will be informed that he/she may appeal in writing to the Foundation's governing board or its designate, and will be advised in writing of the disposition of the appeal.
15. To be assured that the amount of their donation is not publicly disclosed.
16. To be assured that recognition mechanisms created due to a gift shall not be arbitrarily changed or withdrawn. Unless otherwise negotiated at the time of the gift or changed through a joint agreement between the organization and the donor or the donor's family or legal representative, the original form of the recognition mechanism will be maintained. If the mechanism cannot be physically retained, it will be changed to another consistent with the original agreement. If continuation of the recognition creates a reputational risk for the organization, it may be terminated or altered.