

Fundraising Policy

1 - Purpose

This policy is intended to ensure that United Way Greater Toronto's (UWGT) fundraising activities meet our Code of Conduct & Ethics, the [Donor Bill of Rights](#), and best standards in the charitable sector so that public trust in the excellence and integrity of UWGT is maintained.

2 - Scope

This policy applies to all UWGT Board Trustees, other volunteers, and all employees.

3 - Policy

UWGT adheres to the Donor Bill of Rights as developed by the Association of Fundraising Professionals, adopted as a condition of our membership in United Way of Canada.

DONOR BILL OF RIGHTS

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 and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

- I. To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.*
- II. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.*
- III. To have access to the organization's most recent financial statements.*
- IV. To be assured their gifts will be used for the purposes for which they were given.*
- V. To receive appropriate acknowledgement and recognition.*
- VI. To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.*
- VII. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.*
- VIII. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.*
- IX. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.*
- X. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.*

REVIEW PROCESS

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In addition to the Donor Bill of Rights, UWGT adheres to the following policies:

Ethics

All Board Trustees other volunteers and employees will conduct themselves in accordance with UWGT's Code of Conduct & Ethics, and will apply accepted professional standards of accuracy, truth and integrity in all fundraising activities. They will inform, serve, guide and otherwise assist donors who wish to support UWGT's activities but not pressure or unduly persuade.

Conflict of Interest

In cases of potential conflict of interest, those acting on behalf of UWGT must declare the conflict and allow an impartial individual to act for UWGT.

Solicitation

All donor solicitations will treat the donor with integrity, respecting the donor's wishes around how he or she wishes to be solicited. All donor solicitation materials will disclose the name of our organization. Any individual making a solicitation on UWGT's behalf will disclose whether they are an employee or volunteer. We will cease solicitation of a prospective donor who states that he does not wish to be solicited or indicates that he or she considers the solicitation to be undue pressure.

UWGT does not control the practices of other workplace organizations who support the annual campaign through the solicitation of their employees. However, it will at all times encourage respectful practices through the training and advice given to our supporting organizations and their employees who volunteer in their United Way workplace campaign.

Direct Solicitation

UWGT honours donor requests to discontinue direct solicitation. Every effort is made to comply as quickly as possible, and to meet other requests regarding frequency or method of solicitation as much as possible.

UWGT does not sell, rent or trade our donors' personal information.

UWGT consults the Canadian Marketing Association's (CMA) "Do Not Mail" file to remove the names from our mailing list of those registered with this service.

UWGT follows the *Canadian Code of Practice for Consumer Protection in Electronic Commerce* in our online solicitation practices.

Independent Counsel

When a donor is considering making a significant or complex charitable gift, it is the responsibility of the donor to discuss proposed gifts with an independent financial planner, legal adviser and/or tax adviser of the donor's choice and at the donor's expense, to ensure that he or she receives a full and accurate explanation of all aspects of the proposed charitable gift. UWGT may decline a gift if the donor has not obtained independent advice.

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No Commissions

UWGT does not hire third party or commission-based fundraisers. UWGT employees are compensated by a base salary or hourly wages and customary employee benefits. UWGT does not pay finders' fees, commissions or other payments based on philanthropic contributions received or funds raised.

4 - Procedures

UWGT will respond promptly to a complaint by a donor or prospective donor on any matter that is addressed by this policy, in accordance with the policies and procedures outlined in UWGT's [Complaints Policy for Members of the Public](#). Complaints will be reported to the Board of Trustees at least annually on the number and type of complaints received, and actions taken as a result.

It is the responsibility of the Vice President, Philanthropy and Marketing to ensure that this policy is reflected in and guides all resource development activities of UWGT.

Breaches of this policy will be considered a serious matter and subject to disciplinary action up to and including termination.

REVIEW PROCESS