



## 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 [United Way of Canada 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**

*The donor participates in the very essence of our mission and purpose, exercises rights, prerogatives and fundamental privileges that must be recognized at all times and without reservation.*

- I. The right to be informed of the organization's mission and purpose and to become a member of the organization if the donor so wishes;*
- II. The right to know the identity of the organization's officers and members of the Board of Directors and to expect that they act with the greatest transparency, integrity and discernment in implementing the organization's mission and purpose for the best interests of the community;*
- III. The right to have access to the organization's annual financial statements and to easily obtain a copy;*
- IV. The right to know how donations, directly or indirectly contributed to the organization are distributed, and to be assured that donated funds are used as intended by the donor;*
- V. The right to be treated with consideration and respect by the organization and to receive appropriate acknowledgment and recognition;*
- VI. The right to confidentiality regarding personal information about donors and facts about their donations;*
- VII. The right to expect that all relationships between the organization's representatives, and the donor, will be professional in nature;*
- VIII. The right to be informed of the exact nature of the relationship which exists between fundraisers and the organization;*
- IX. The right to expect that the organization will not share or sell a mailing list which includes the donor's name, without providing the donor with a meaningful opportunity to decline;*

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#### REVIEW PROCESS



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- X. *The right to ask questions of the organization and to expect prompt, truthful, and complete answers in an easy-to-understand manner.*

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 thorough 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 they wish 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 they do not wish to be solicited or indicates that they consider 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.

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#### REVIEW PROCESS

Policy Postings: Intranet, Website, Board Portal

Policy Version Date: April 2021

Review Frequency: every 2 years

Date of Most Recent Review: May 2024    Date of Next Review: May 2026



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### 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 they receive 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.

### 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