

POLICY CATEGORY: Donor	NUMBER: 2.2	PAGE: 1 of 2
SUBJECT: Donor's Bill of Rights		
EFFECTIVE DATE/APPROVED: September 2016	REVISED/REAFFIRMED: New Policy	SUBJECT FOR REVIEW: November 2020

Policy Statement:

The Community Foundation serving Greater Saint John (the Foundation) provides individual donors, family foundations, businesses and charitable organizations a number of ways to fulfill their philanthropic objectives while supporting the well-being of our community.

We believe that by strengthening the gifts, assets and capacity of individuals and groups, we strengthen our community. The Foundation specializes in building endowment funds, where the capital is not diminished, and uses the earnings from the funds to support the ever-changing needs and opportunities in our community.

To ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the local charities and causes they are asked to support, we subscribe to a series of rights which our donors can expect.

Procedures:

Donors' Rights

1. To be informed of the Foundation's mission, of the way the Foundation intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
2. To expect that all relationships with individuals representing the Foundation will be professional in nature.
3. 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.
4. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.
5. To be encouraged to seek independent advice regarding their gift.
6. To have access to the Foundation's most recent financial statements and annual report.

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7. To have the right to see their donor record and to challenge its accuracy.
8. To be assured that information regarding their donation(s) is handled with respect and with confidentiality to the extent provided by law and based on their expressed instructions.
9. To receive appropriate public recognition or to remain anonymous. Donors may wish to have the gift recognized but not be attributed to that gift. Donors may wish that their donation is not publicly disclosed at all.
10. To receive a prompt and appropriate acknowledgment directly from a Foundation representative as per the Donor Recognition and Stewardship Policy #2.1.
11. To be assured that the Foundation does not share mailing lists with any other organization and have the opportunity for their names to be deleted from Foundation mailing lists when requested.
12. To receive an official receipt for income tax purposes promptly as outlined in the Receiving Gifts and Receipting Policy #2.3.
13. 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 this policy.
14. To receive a timely response from either a designated staff member or Board member 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.

References:

Donor Recognition and Stewardship, Policy #2.1

Receiving Gifts and Receipting, Policy #2.3