

Fundraising Policy

1 - Purpose

This policy is intended to ensure that United Way Toronto's (UWT) 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 UWT is maintained.

2 - Scope

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

3 - Policy

UWT adheres to the Donor Bill of Rights, 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.

- *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;*
- *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;*
- *The right to have access to the organization's annual financial statements and to easily obtain a copy;*
- *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;*
- *The right to be treated with consideration and respect by the organization and to receive appropriate acknowledgment and recognition;*
- *The right to confidentiality regarding personal information about donors and facts about their donations;*
- *The right to expect that all relationships between the organization's representatives, and the donor, will be professional in nature;*
- *The right to be informed of the exact nature of the relationship which exists between fundraisers and the organization;*

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- *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;*
- *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, UWT adheres to the following policies:

Ethics

All Board Trustees other volunteers and employees will conduct themselves in accordance with UWT'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 UWT's activities but not pressure or unduly persuade.

Conflict of Interest

In all matters involving the donor, the interest and well-being of the donor must take priority. In cases of potential conflict of interest, those acting on behalf of UWT must declare the conflict and allow an impartial individual to act for UWT.

Solicitation

All donor solicitations will treat the donor with integrity, respecting the donor's wishes around how he or she wishes to be solicited. Any individual making a solicitation on UWT'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.

UWT 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.

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Direct Solicitation

UWT 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.

UWT 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.

UWT does not sell donor lists. As a cost effective way of obtaining the names of potential donors, UWT occasionally trades information with other not-for-profit organizations, under the following policies:

- UWT only trades the names and mailing addresses of donors who have given to a direct mail appeal and have had the opportunity to opt-out of having their name and mailing address traded. UWT will honour donors' requests that their name and address not be traded.
- UWT only trades direct mail lists with selected charities that have signed documentation to indicate that they are compliant with the Personal Information Protection and Electronic Documents Act (PIPEDA).
- UWT only consents to trading its direct mail list for a single mailing appeal by the other charity. The charity is not permitted to keep the name and address for future use.

UWT 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. UWT may decline a gift if the donor has not obtained independent advice.

No Commissions

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

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4 - Procedures

UWT 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 UWT'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 of Resource Development to ensure that this policy is reflected in and guides all resource development activities of UWT.

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