

Donor Engagement Standards

Overview

The Donor Engagement Standards sets out the policies that are to guide staff members of The Winnipeg Foundation when they are interacting with donors and potential donors of The Winnipeg Foundation. The Foundation seeks to create an unrivalled donor experience wherein the best practices of the philanthropic community are upheld. For this reason, this document serves as a minimum standard of best practice. All staff working with donors in any capacity are also expected to uphold the Association of Fundraising Professionals *Code of Ethics* during the course of their work. The Foundation endorses the following donor principles:

- A. To be informed of The Foundation's mission, of the way The Foundation intends to use gifts effectively and for their intended purposes.
- B. To be informed of the identity of those serving on The Foundation's Board of Directors and standing Committees, and to expect the Board to exercise prudent judgement in its stewardship responsibilities.
- C. To have access to The Foundation's most recent audited financial statements.
- D. To be assured gifts will be used for the purposes for which they were given.
- E. To receive appropriate, timely acknowledgement and recognition.
- F. To be assured that the information about their gift is in accordance with The Foundation's own privacy policies.
- G. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
- H. To feel free to ask questions when making a gift and to receive prompt, truthful, and forthright answers.

Policy on Donor Requests

The Winnipeg Foundation honours donors' and prospective donors' requests to:

- Limit the frequency of contact;
- Not be contacted by telephone or other technology;
- Receive printed material concerning the organization; and
- Discontinue contact.

Policy on Donor Anonymity

Donors wishes regarding recognition or anonymity related to their gift will be respected provided that any recognition is congruent with the Foundation's usual standards of practice and legal requirements.



Policy on Donor Lists

The Winnipeg Foundation does not sell, rent, transfer, or share its donor lists with outside organizations except in instances where the outside party is acting as a contractor working on behalf of The Foundation. All outside contractors are expected to agree to and adhere to The Foundation's relevant policies governing the use of Foundation information.

Policy on Independent Advice

Persons acting on behalf of The Foundation shall inform, serve, guide, or otherwise assist donors who wish to support The Foundation's activities, but not to engage in actions which may be perceived as inappropriate or directive. All staff members, Board members, and volunteers must act in accordance with *The Conflict of Interest Policy*.

Persons acting on behalf of The Foundation shall encourage donors to discuss any proposed gift with independent legal and/or tax advisors (of the donor's choice) to ensure a donor receives a full and accurate explanation of all aspects of any proposed charitable gift.

Policy on Payment of Fundraisers

No employee, contractor, or volunteer of The Winnipeg Foundation will receive, either directly or indirectly, any finder's fees, commissions or percentage compensation based on donations received. As a rule, The Foundation does not contract outside service providers to fundraise or solicit donations on behalf of the organization.

Policy on Donor Engagement Activities

All donor engagement activities conducted by or on behalf of the organization must:

- Be truthful,
- Accurately describe the activities of The Winnipeg Foundation
- Disclose that the communication is regarding The Winnipeg Foundation,
- Disclose the purpose for which funds are going to be utilized, including any relevant governing policies,
- Disclose information on how The Foundation distributes Official Income Tax Receipts,
- Upon request, disclose the title of the person conducting donor engagement activities and whether they are an employee, volunteer or contracted third party.

