

Policy Title:	Donor Relations Policy	Policy #:	PHFP – VI - 23
Volume:	VI Operations	Originated:	3/9/2003
Recommended by:	Providence Healthcare Foundation	Reviewed:	01/06/2017
Approved by:	Stewardship Committee	Approved:	04/08/2016
	Foundation Board of Directors	Approved:	04/27/2016
		Page:	1 of 3

**PURPOSE**

To provide a framework upon which the Providence Healthcare Foundation (“Foundation”) can maintain and cultivate strong relationships with donors according to the “Donor First” philosophy; and to honour our Inspiration Statement’s pledge: *“With courage, conviction, hope and humour, Providence Healthcare Foundation will create meaningful relationships by being passionately engaged in all that we do.”*

To provide an understanding of how Foundation staff can effectively work with donors to raise essential funds for Providence Healthcare.

To ensure understanding of how funds are raised and of how we honour all donor requests,

**POLICY**

Providence Healthcare Foundation actively maintains a “Donor First” philosophy, whereby we recognize the indispensability of each of our donors and treat all of their questions, concerns, and requests, as top priorities.

This policy and the following general fundraising procedures will be included in the Foundation Staff Orientation manual and be reviewed on an annual basis at the first Foundation Staff meeting of the year.

**PROCEDURES**

Each year, Providence Healthcare Foundation President & CEO meets with Providence Healthcare’s Senior Management team to identify equipment and/or program funding needs. This ensures our annual fundraising objectives are clearly defined and aligned to organizational strategy, but more importantly, it ensures donor dollars are directed to the designated priorities within Providence.

At the beginning of each fiscal year the Foundation Board approves general fundraising goal is to directly support the most urgent needs of Providence Healthcare. We will achieve this goal through various fundraising initiatives which include: major gift and planned giving programs, three signature events, cultivation programs, bi-annual direct mail appeals, third-party events, and tribute program.

**1. Honouring Donors’ Requests Regarding Anonymity and Contact:**

- All donor requests are honoured by updating respective donor constituency record in Raiser’s Edge. These requests include, but are not limited to: remain anonymous, limit frequency of contact; not be contacted by telephone or other technology; receive printed material concerning the organization; discontinue contact.

**2. Donor Lists:**

The Foundation does not sell, rent, exchange or share its donor list.

**3. Donor Privacy:**

- All donor and gift information is privileged and confidential and is not disclosed to unauthorized parties.
- All donor and prospect information created by donor giving, or on behalf of Providence Healthcare Foundation, is not transferred or utilized, except within Providence Healthcare Foundation.
- Donors may review their records at any time at their request. ([Confidentiality Policy](#))

**4. Encouraging Individual Donors to Seek Independent Advice:**

- Providence Healthcare Foundation cultivates a trusting relationship with prospective Planned and/or Major Gift donors and encourages them to seek independent advice from close family members and/or estate planning professionals before conferring a Planned or Major Gift. ([Bequest Gifts Policy](#))

Policy Title:	Donor Relations Policy	Policy #:	PHFP – VI - 23
Volume:	VI Operations	Page:	Page 2 of 3

## 5. Fundraising Activities:

Providence Healthcare Foundation fundraising activities:

- ✓ disclose the Foundation’s name;
- ✓ are truthful;
- ✓ accurately describe the Foundation’s activities;
- ✓ disclose the purpose for which funds are requested;
- ✓ disclose the Foundation's policy with respect to issuing Official Income Tax receipts including our policy on minimum amount (\$10) for which a receipt will be issued ([Gift Acceptance and Donation Policy](#)); and
- ✓ disclose, upon request, whether the individual or entity seeking donations is a volunteer or employee.

## 6. Payment of Fundraisers

All fundraising activity is managed by Foundation staff, with the support of strong volunteer committee groups. The Foundation does not, directly or indirectly, pay finder’s fees, commissions or percentage compensation based on contributions.

### “Donor First” Office Procedures:

1. All Foundation staff will be courteous, professional and sensitive with donors at all times. As deemed appropriate, staff will tactfully communicate our gratitude to donors; will let them know how much their support is valued; and whenever possible, will create and utilize opportunities to encourage them to increase their philanthropic commitment to Providence Healthcare.
2. To best serve our current and potential donors, the donor hotline is continuously monitored during business hours and all messages are responded to daily (Monday to Friday) to ensure requests are met within a two business days.
3. A staff person must always be on duty in the Foundation reception area. If the Development Assistant takes a break or is absent, they must ensure that another staff member is available in the office to greet visiting donors or guests. Should there be an instance when all members of the Foundation are out of the office; a note will be placed on the Foundation door indicating when we are expected to return. If the Development Assistant is away from their desk for more than 30 minutes (lunch, vacation, meetings etc.) they will forward the phone to the Event Assistant or the most appropriate alternate back up.
4. Often a caller/visitor will ask a staff person a question which he/she cannot answer. In such cases, the caller/visitor should be directed to appropriate staff portfolio holder. If no one is available, then the initial staff person will take the caller/visitor’s name and contact information and will ensure that the appropriate person gets back to him/her within 24 hours.
5. It is always the responsibility of the first point of contact to ensure that the donor’s requests are met, through confirmed follow-up with portfolio holder.
6. In almost every circumstance, the Foundation will adopt the attitude that “the donor is always right.” The Foundation will respond to all complaints and concerns by:
  - Empathizing with the donor (e.g. “I completely understand” ...);
  - Doing as much as possible to turn negatives into positives (e.g. “Thanks to your help, we will be able to prevent similar incidents from occurring in the future”...);
  - Letting the donor know that their concerns will be reported to the appropriate staff and will be rectified quickly and effectively;
  - Mailing out a follow-up letter reiterating the course of action and providing them with a name and contact number should further questions arise.
  - **After any complaint, a [Donor Complaint Form](#) must be filled-in and electronically filed in the donor’s Raiser’s Edge file; and a hard copy sent to the President & CEO, and/or appropriate Foundation Staff member.**

NOTE: The above will not apply in circumstances where a donor acts unlawfully or makes an unreasonable demand (e.g. refusing payment for goods, services or events; insisting upon a tax receipt when not eligible, etc.). In such instances, the Foundation staff will pass on the donor’s name to the President and CEO for approved course of action and follow up.

### APPROVAL PROCESS

- The Donor Relations Policy will be reviewed by the Foundation on an annual basis.
- Major changes will be brought to the attention of the Stewardship Committee and Foundation Board of Directors for approval.

Policy Title:	Donor Relations Policy	Policy #:	PHFP – VI - 23
Volume:	VI Operations	Page:	Page <b>3</b> of <b>3</b>

**TRACKING & REVIEW**

The Foundation Governance & Corporate Manager, will bring forward as needed, either by recommendation or request for significant changes to content; update the Reviewed and Approved dates on the policy; and update the Policy Index.

**REFERENCES**

Imagine Canada Standard: A14, C0

[Code of Ethics/Conduct Policy](#)

[AFP Code of Ethics](#)