



D-12: Donor Bill of Rights

PURPOSE:

PCE is committed to the highest ethical standards for accepting donations. The Donor Bill of Rights was created by the Association of Fundraising Professionals to instill trust and respect among the public in relation to non-profit organizations. Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life.

The PCE Donor Bill of Rights was based on that of the Association of Fundraising Professionals.

PROCEDURE:

OVERSIGHT

The Board of Trustees has oversight of all agency fundraising. The agency's mission, strategic plan, Board of Trustees and Leadership Team members, and annual report are available on the agency's website. Through all of these mechanisms, donors can be informed of the agency's mission, how funding is used for care management and program services, and how all funding is accounted for. This meets the following requirements from the Donor Bill of Rights:

Donor Bill of Rights:

Article 1

To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.

Article 2

To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgement in its stewardship responsibilities.

Article 3

To have access to the organization's most recent financial statements.

DONOR SOLICITATION

Currently, Partnership for Children of Essex is not actively soliciting donors. PCE regularly organizes community events to engage and educate the community and perspective families about the services we provide. During these events, individuals interested in potentially making a donation are encouraged to ask questions and dialogue with PCE employees at the events regarding the agency's work and needs.

Periodically the agency receives small donations or honorariums from grateful families and those interested in the agency's work in the community. These donors are thanked formally in a letter and communicated with via email and phone as appropriate.

The above meets the following requirement from the Donor Bill of Rights:

Donor Bill of Rights:

Article 10

To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

DONOR COMMUNICATION

The agency communicates appropriately with current and potential donors in an ongoing basis, by email, mail, telephone and all social media channels (Facebook, Instagram, etc.) as appropriate. All communication and donations sent/received are immediately recorded by PCE's Business Department. Any donor specific requests regarding their donations, including their wishes to be deleted from communication or to remain anonymous, are handled confidentially, and honored. This meets the following requirements from the Donor Bill of Rights:

Donor Bill of Rights:

Article 6

To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.

Article 9

To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.

DONOR RECOGNITION

All donations are promptly recognized via formal letter, email, and/or a phone call as appropriate. The purpose of their gift is also recognized in these communications. All requests to remain anonymous are honored. This meets the following requirements from the Donor Bill of Rights:

Donor Bill of Rights:

Article 4

To be assured their gifts will be used for the purposes for which they were given.

Article 5

To receive appropriate acknowledgement and recognition.

DONOR CONFIDENTIALITY

In all cases, HIPPA privacy regulations supersede any donor recognition. Donors who wish to be anonymous will be recognized as such or not at all. This meets the following requirements from the Donor Bill of Rights:

Donor Bill of Rights:

Article 6

To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.

VALUING OF DONATIONS

Partnership for Children of Essex at no time will define fair market value of non-cash donations. Donor provided fair market values are only recognized when accompanied by a valid receipt, and at no time will a donor request for an issued receipt valued higher than the donation or with an altered gift date be honored. This meets the following requirements from the Donor Bill of Rights:

Donor Bill of Rights:

Article 1

To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.

DONOR INTENT

Partnership for Children of Essex adheres to Donor Bill of Rights. Restricted gifts are recorded as such in donor software records and are identified to the Business Department. Any adjustments in the use of donated funds from the original intent are reviewed with the donor if possible and is subject to their approval. This meets the following requirements from the Donor Bill of Rights:

Donor Bill of Rights:

Article 4

To be assured their gifts will be used for the purposes for which they were given.

GIFT ACKNOWLEDGEMENT

All gift acknowledgement correspondence contains appropriate legal and regulatory disclaimers. Gift records are retained for a minimum of 7 years after which they may be securely destroyed.

All donor records are kept in donation specific files in locked cabinets by the Business Department. This meets the following requirements from the Donor Bill of Rights:

Donor Bill of Rights:

Article 6

To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.

Article 7

To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.

VOLUNTEER INVOLVEMENT

With very rare exceptions, volunteers involved with fundraising are sitting members of the Board of Trustees who understand their fiduciary responsibility, and have agreed to protect donor privacy, and receive Corporate Compliance training annually. This meets the following requirements from the Donor Bill of Rights:

Donor Bill of Rights:

Article 8

To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.