

Donor Care Policy

1. Our Policy

- 1.1 EECF ensures prudent use of all information pertaining to individuals and organisations that have contributed, pledged, or are prospects to contribute to EECF.
- 1.2 Records, files, and other material gathered or produced by EECF in relation to actual or prospective donors will be held in strict confidence by the Foundation's staff, trustees, volunteers.
- 1.3 EECF will not sell, trade or share a donor's personal information to any other entity without the donor's written permission. All private gifts, grants, pledges, and expectancies to EECF will be recorded. It is the responsibility of those who keep and use these records to protect the privacy of donors to the fullest extent possible, except when the donor's approval has been secured to announce a gift, pledge, etc., publicly, or when required by legal subpoena, as specified below.
- 1.4 EECF exercises special caution to protect the identity of donors who wish to remain anonymous. The names of anonymous donors, as well as other identifying information, is withheld on gift reports and other documents.
- 1.5 Volunteers who work with confidential material necessary for the evaluation, cultivation, and solicitation of donors are oriented concerning the confidentiality of that information.

2. Governance

- 2.1 EECF is a registered charity and a company limited by guarantee. It has an elected Board of Trustees who come from all walks of life, bringing a wide range of experience to the Charity's activities. EECF is responsible for ensuring that it meets all the legal and financial requirements demanded by the Charity Commission, Inland Revenue and other relevant bodies.
- 2.2 EECF invests all endowed funds in its general portfolio. The value is tracked to provide quarterly income for distribution. EECF operates a total returns policy which allows some market growth to be taken as income. The final responsibility for all grant-making decisions over £800, made from any of the funds managed by EECF, rests with its Board of Trustees.

3. What a donor can expect

3.1 Type of gift accepted

- 3.1.1 EECF aims to be as flexible as possible in responding to the aims and wishes of donors, whether corporate or individual.
- 3.1.2 EECF welcomes donations of any size, to increase the available funds for expenditure in EECF's Trust's benefit area.

- 3.1.3 For larger donations, donors might prefer to consider a named fund with specific objectives or geographical coverage; and provided there is no conflict with EECF's powers and general policies we will endeavour to structure arrangements to meet the donor's wishes.

These might include, for example:

- A named expendable endowment fund.
- A named 'flow-through' fund where the fund is regarded as income and spent within an agreed timescale for agreed purposes.

- 3.1.5 In each case, the donation would be clearly identified in EECF's report, accounts, and its publicity, in accordance with the donor's wishes.

- 3.1.6 Subject to EECF's overall policies, it is happy to consider and discuss any arrangement along similar lines to meet donors' wishes.

- 3.1.6 EECF accepts any amount in the form of a gift or donation. However, a major donation shall be an amount above £10,000. We can also accept gifts in shares, land, property, or any other asset that produces a regular income.

3.3 Minimum requirements

Each named fund is opened with an initial donation and we will then work with the donor to help the fund grow over time. Some donors choose to make regular annual donations. Others top-up their regular donations with one-off contributions – perhaps as a result of a staff fundraising event, by asking for donations in lieu of gifts at a special event or anniversary or as a result of receiving a bequest.

3.4 Tax effectiveness

Where possible we would encourage all donations to be made in a tax-effective manner, usually by Gift Aid.

3.5 Fees and investment policy

- 3.5.1 A small charge may be made to cover investment management, grant assessment and administration. This will be based on the size and type of the fund.

- 3.5.2 The money received for any named fund shall be invested and managed as a whole with all other funds within the investment portfolio of EECF or in accordance with the donor's wishes.

3.6 Distributions

The Board of Trustees determines and approves all fund distributions, which will be made in accordance with the wishes of the donor.

4. Review of donor fund with donor

The Chief Executive shall review the donor fund with the donor on an annual basis.