

## Donor Care Policy

### 1. Our Policy

- 1.1 EECF acts in accordance with the General Data Protection Regulation (GDPR) as implemented on 25<sup>th</sup> May 2018. GDPR applies to 'personal data', which means any information relating to an identifiable person who can be directly or indirectly identified in particular by reference to an identifier. Further information can be found in EECF's separate policy on GDPR compliance and data management.
- 1.2 EECF ensures prudent use of all information pertaining to individuals and organisations that have contributed, pledged, or are prospects to contribute to EECF.
- 1.3 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.
- 1.4 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.
- 1.5 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.
- 1.6 Volunteers who work with confidential material necessary for the evaluation, cultivation, and solicitation of donors are oriented concerning the confidentiality of that information and will be asked to read this policy and confirm in writing their understanding and acceptance of the policy.

### 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 from legitimate sources, to increase the available funds for expenditure in EECF's Trust's benefit area.
- 3.1.3 Donations can be directed into EECF's existing funds, including the Life Chances Campaign, or made as an unrestricted gift. Donors to the Life Chances Campaign can choose to restrict their gift to one of the three priority campaign areas.
- 3.1.4 Larger donations may be directed into an existing fund, or, alternatively, donors might prefer to consider a named fund with specific objectives or geographical coverage. 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.
- 3.1.7 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.

### 3.2 Minimum requirements for named funds

A new named fund can be opened with an initial donation of £20,000 and EECF 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.

### 3.3 Tax effectiveness

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

### 3.4 Fees and investment policy

- 3.4.1 A charge may be made to cover investment management, grant assessment and administration of named funds. This will be based on the size and type of the fund.
- 3.4.2 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.

3.5 Distributions

The EECF Board of Trustees determines and approves all fund distributions. In the case of donor-advised funds, disbursements will be made in accordance with the wishes of the donor.

**4. Donor stewardship**

4.1 EECF shall review the performance of donor-advised funds with the donor on an annual basis.

4.2 Monitoring and evaluation of all grants will be undertaken in line with EECF standard procedures, except where otherwise agreed in the case of a donor-advised fund.

4.3 Donors to both named and general funds - including campaigns - will receive information on the impact of their support at least biannually. Donors may also be invited to visit beneficiary organisations and projects, as is appropriate to their gift purpose and level.