



# DONOR BILL OF RIGHTS

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. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the Bermuda Community Foundation and the causes we support, we declare that all donors have these rights:

- 1** To be informed of the Bermuda Community Foundation's mission, of the way the foundation intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
- 2** To be informed of the identity of those serving on the Community Foundation's Board of Trustees, and to expect the board to exercise prudent judgment in its stewardship responsibilities. To have the Board of Directors' variance power clearly explained to you.
- 3** To have access to the most recent financial statements.
- 4** To be assured that your gifts will be used for the purposes for which they were given.
- 5** To receive appropriate acknowledgement and recognition and, if requested by the donor, to remain anonymous.
- 6** To be assured that information about your donation is handled with respect and confidentiality to the extent provided by law.
- 7** To expect that all interactions with the Bermuda Community Foundation will be professional in nature.
- 8** To be informed whether those seeking donations for the Bermuda Community Foundation are volunteers or paid staff.
- 9** To have the opportunity for your names to be deleted from mailing lists that the Bermuda Community Foundation may share.
- 10** To feel free to ask questions when making a donation or contribution and to receive prompt, truthful and forthright answers.

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- 11 To receive an explanation of the purpose of unrestricted funds, and the opportunity to assign a portion of a gift for the general, unrestricted grant making purposes of the Community Foundation.
- 12 To be encouraged to consult with your personal financial advisor for tax and related implications of your gift.
- 13 To be informed of fees that will be assessed to a Donor Fund on an ongoing basis to service and manage all fund-related activities.
- 14 To be informed of the charitable purposes that qualify for grants in the legacy you establish, and to be informed that a grant that directly benefits the donor or the donor's family, friends, or business does not qualify as a charitable purpose.
- 15 To receive a timely response from either a designated staff member or Board Director to a complaint by a donor or prospective donor about any matter that is addressed in this Donor's Rights Policy. A complainant who remains dissatisfied will be informed that he/she may appeal in writing to the Bermuda Community Foundation's governing board, and will be advised in writing of the disposition of the appeal.

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