



Donor Charter for

South Yorkshire's Community Foundation

Thank you for entrusting South Yorkshire's Community Foundation with the management of your philanthropy. We recognise that our work would simply not be possible without the generosity of our donors and we are committed to providing our benefactors with respect and an established level of care.

I outline here our commitment to providing a quality service:

Donor Charter

South Yorkshire's Community Foundation will:

Respect our donors.

Treat our potential supporters and donors with an established level of care.

Our Commitment

All donors have the right to:

- Prompt attention, accuracy and integrity from our staff team.
- Not be subject to any undue pressure.
- Appropriateness in solicitation of future giving.
- Privacy and we will adhere to our privacy policy.
- Confidentiality and the right to remain anonymous. Please refer to our data protection and confidentiality policy.
- Removal of their details from our database records upon request. For details about this please refer to our privacy policy.

All Named Fund Holders will:

- Be allocated a named Fund Manager within the Community Foundation who will be your prime point of contact.
- Receive the level of involvement and communication that has been requested and outlined in your Donation/ Fund Agreement for the grant allocations from your Fund.
- Receive an annual Fund report by post unless otherwise requested.
- Receive relevant communications by email or post regarding the wider Foundation's activities and community impact. (Note: you can opt out of receiving email communications).
- Be invited to the Foundation's annual events where you may meet our Trustees, staff team, philanthropists and the beneficiaries of community giving. (Note: you can opt out of receiving event invitations).

- Usually receive one meeting a year, if required, to review the management of your Fund and the Foundation's broader work.
- Be assured that your Fund will be managed responsibly and to the advantage of your stated beneficiary group. Our comprehensive assessment process will ensure your donation makes a real difference to local communities and responds to the areas of need.
- Be assured that we will manage your donation wisely. Our investment policy is aimed primarily at prudent management of the principal capital, whilst maximising the income available for grants.
- Unless you wish to remain anonymous, your Fund will be listed in our Annual Review and on our website and we will work with you to respect your wishes on profile, publicity and celebrating your philanthropy.

All donations

- Will receive a prompt gift acknowledgement and 'thank you'.
- Will be directed as the donor wishes.

Our staff will

- Be transparent, accurate and honest in their relationship and communication with donors.
- Achieve the highest standards of professionalism at all times.
- Strive to comply with the donor's wishes.
- Explain clearly any administrative fees, investment policies and the Foundation's grant making policy – if required.
- Ensure that activities are informed by stakeholder feedback on funds, grant programmes, sponsorship, membership and other forms of donations.
- Respond to electronic, written and telephone enquiries, where necessary within 7 working days.
- Be aware of the Foundation's commitment to equal opportunities.
- Adhere to charity law at all times.
- Comply with the Foundation's Data Protection and Confidentiality Policy.

How to raise concerns

If you have any concerns relating to the South Yorkshire's Community Foundation, its services or staff, you are encouraged to make contact with the Chief Executive Officer or Chairman.

Ruth E Willis, Chief Executive Officer: Email – rwillis@sycf.org. Tel: 0114 2429009

James Newman OBE, Chairman: Email – james@westwoodonderwent.co.uk. Tel: 07850 672727

Your philanthropy really will make a difference.



RUTH E WILLIS
Chief Executive