Donor Care Policy

Purpose

Cheshire Community Foundation (CCF) aims to provide a high level of donor care to ensure that donors feel valued and proud of the difference their donation makes. We recognise that every donor is unique and that our way of engaging with donors should reflect some agreed principles and our annual donor engagement plan.

The following principles guide the care and service provided to donors:

- CCF provides a personalised service which respects our donors' philanthropic interests and motivations, and which is designed to meet their individual needs as Cheshire philanthropists.
- CCF keep donors engaged and updated with information about community issues and needs and grant making opportunities (through our commitment to proactive grant making).
- CCF provides opportunities for active involvement in identifying community issues and opportunities for engagement through the grant making process and through participation in impact groups, where appropriate.

Outcomes of the policy

For donors:

- a high level of pride and satisfaction from knowing the difference that their donation has made.
- an increased connection to the community and to the beneficiaries of their funds.
- an increased knowledge about community issues and needs.
- donors feel respected and valued.
- donors feel part of CCF and part of a family of donors – a community of giving, through initiatives such as the Cheshire 100.

For Cheshire Community Foundation:

- Donors are more likely to report that the CCF plays a major role in their philanthropy or is the sole vehicle they use for charitable giving.
- Donors become advocates for CCF and may refer new donors to help build local philanthropy.
- CCF benefits from increased donor interaction and engagement through additional giving.
- CCF is considered as the partner of choice for local philanthropists.

Tailoring the Service to Donors

This policy, alongside the donor engagement plan, aims to provide an outline on the service that donors can expect with the approach tailored to/based on an assessment of the donor/ potential donors level of engagement and interests. These include the following key groups:

- Flow-Through Fund Holder - Donor Advised Funds (£10k+)
    - Individuals and families
    - Corporates and Trusts
- Endowment Fund Holder – Donor Advised Funds (£10k+)

- Legacy
- Cheshire 100 members (supporters' club)
- Lower-level Donors (such as one-off donations to campaigns)
- Prospects
- Professional Advisors

The Donor Care Policy recognises that a long-term relationship with donors can be built and developed over 3 phases:

1. Development of the relationship
2. Establishment of a fund
3. Ongoing donor stewardship.

1) Development

When establishing a new Fund, Cheshire Community Foundation will advise donors on each of the following areas:

- **Fund Strategy**

Overall strategy for the fund will be discussed and the key impacts the Donor would like to see. This may vary and develop over time as the Donor sees the impact of their giving, becomes more involved with the Foundation and responsive to the information we provide in relation to community need.

- **Type of Fund**

Options available in terms of flow-through funds, endowment funds or a combination of both will be discussed with the donor. Features and advantages of each type of fund will be explained.

- **Grant making/allocation of Funds**

The grant making process, the benefits of the Foundation's assessment and due diligence procedures and the Panel approval process will be outlined to the Donor, including how grants are monitored and evaluated. The level of involvement the Donor wishes to have, in terms of grant allocations, will be decided but can be reviewed at any time.

- **Costs**

Management fees will be explained openly for each type of Fund. It is the intention of Cheshire Community Foundation to never take more in fees than is required.

- **Investments**

Where relevant, the Foundation's Investment Policy will be discussed, including the current yield, capital growth and potential for the value of the fund to increase or decrease.

- **Management of the Fund**

We will discuss how the fund will be managed, who is responsible and how the impact of the fund will be monitored and evaluated including fund statements, site visits, events etc.

- **Fund Agreement**

A draft Fund Agreement will be produced, to outline our service commitment to the Donor. It is important to use this phase of the relationship to get to know the donor. If there are any concerns about the way the donor wishes to direct their funds or concerns on the source of funding this is raised as soon as possible with the COO or CEO to enable further background check to be completed.

2) Establishment

Once the fund is agreed in principle, the following are completed to establish the Fund:

- **Fund Agreement**

This will be signed by the Donor and the Chief Executive or Chair on behalf of Cheshire Community Foundation. Once signed by Cheshire Community Foundation, a copy will be returned to the donor for their records and saved electronically on the Fund record.

- **Donation**

A thank you communication will be sent within seven days appropriately acknowledging receipt of the donation. A further personal thank you will be sent from typically the Chair of Trustees or President for significant donations, in line with the Donor Engagement Plan.

- **Gift Aid**

Where applicable, CCF will claim Gift Aid on donations. In agreement with the Donor, this money may be added to their donor fund or into the campaign fund to which they are donating or to the CCF discretionary grant-making fund. The agreed fee for donations for the destination fund will be deducted to support grant making activity at the agreed rate for donations into the chosen Fund.

However, if appropriate, the donor may also be asked if they would prefer that their gift aid is treated as a contribution to CCF's core costs. The benefits for CCF should be explained so that donors recognise that gift aid attributable to their donation will be used to support CCF ongoing activity.

- **Communication**

CCF staff will be briefed on fee levels, the fund criteria and management of the Fund by the CEO or person who managed the development and agreement phases with the Donor. New funds will be highlighted as part of the quarterly report to the Board to ensure that the Treasurer and Trustees are aware of the relationship. An Account Manager will be allocated to the Donor.

- **Fund Management**

The Account Manager will meet with the donor to confirm about their expectations, their fund criteria and giving preferences, comfortable level of engagement, publicity/press releases, anonymous on-site visits, e-newsletter, events, preferred method and consent for communication. This must be recorded on the Fund on DIGITS2, with the communication preferences being updated annually, as part of the Impact Report.

- **Record-keeping**

The details of Fundholder, including contact details, type of fund, anonymity, agreed fees, anniversary date for Annual Fund Report and the Fund Manager will be kept updated on our CRM system, as per our Privacy Policy and Data Protection Policy.

3) Ongoing donor stewardship

Once the fund has been established, the following services will be provided (as appropriate):

- **Annual Fund Impact Report**

A report or presentation, ideally to be delivered in person, will be collated each year on the anniversary of the Fund set-up. This will include a summary of all the grants awarded, case studies, details of the impact of grants (including information from the end of project monitoring sheets), a fund statement and copies of thank you letters and promotional material.

- **Individual Fund Statements**

Those donors with an endowment fund may request a quarterly fund statement or an annual fund statement on the anniversary of the establishment of their fund. They will additionally receive a fund statement in April/ May indicating the change in capital value and the options available to them within CCF's total returns accounting/ investment policy.

- **Visits to charities supported**

Cheshire Community Foundation will arrange site visits for Fund holders either to look at a project prior to approval, to meet the group following a grant award or to meet the group on completion of their project.

- **Events**

Donors will receive invitation to the CCF's annual awards as well as other events during the year as appropriate.

- **Annual Check of Services**

The Chief Executive will meet DAF donors (or contact by phone if a meeting is not practical) each year on the anniversary of the fund to check whether any changes or improvements are needed to the management of the fund and the fund criteria.

- **Communications**

The quarterly e-newsletter or similar communication will be sent to all donors and potential donors where they are happy to receive it. Typically, this will include an end of year thank-you before Christmas and an update on the CCF activities the previous year in the spring.

Monitoring our Donor Care

CCF are committed to reviewing the application of this policy regularly. Tracking of donor engagement via repeat donations, attendance at events and ongoing interaction is consider as part of the internal donor engagement reviews.

The annual donor feedback will include checking that the donor is satisfied with the service provided. This feedback may be provided informally or recorded more formally.

Additionally, the CEO and identified Trustees may follow up with donors at events, by phone or by organising specific review meetings.