

Canopy Donor Relations Policy

Canopy: Trees for Palo Alto (Canopy) solicits funds from the public or from donor institutions using material that is truthful. **Canopy** respects the privacy concerns of individual donors and expends funds consistent with donor intent. **Canopy** discloses important and relevant information to potential donors.

Donor Intent. Donors' wishes will be considered to the extent possible, as long as their intended use of funds is in keeping with the purpose of **Canopy** and with the policies and priorities of the organization. **Canopy** will not accept a gift for which it is incapable of honoring donor intent.

Acknowledgment. All gifts, regardless of value, form, or stipulations, shall be acknowledged by **Canopy** in the form of a written substantiation, including a gift receipt.

Recognition. Formal recognition of donors includes methods that convey appreciation to the donor and provide opportunities for public acknowledgment.

Public Notice. **Canopy** will respect a donor's wish to remain anonymous.

Confidentiality. The Canopy staff, members of the board and of the Finance and Development Committee shall maintain confidentiality concerning all correspondence regarding contributions, gift records, prospect cards, and other data on donors, and will ensure that this donor information is used on a need-to-know-basis only for the support of fund development for **Canopy**.

Canopy affirms its intention to adhere to the following "Donor Bill of Rights":

In raising funds from the public, **Canopy** will respect the rights of donors as follows:

- ♦ To be informed of the mission of Canopy, the way the resources will be used, and the organization's capacity to use donations effectively for their intended purpose,
- ♦ To be informed of the identity of those serving on Canopy's governing board and to expect the board to exercise prudent judgment in its stewardship responsibilities,
- ♦ To have access to Canopy's most recent financial reports,
- ♦ To be assured their gifts will be used for purposes for which they are given,
- ♦ To receive appropriate acknowledgment and recognition,
- ♦ To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law,
- ♦ To be approached in a professional manner,
- ♦ To be informed whether those seeking donations are volunteers, employees of Canopy, or hired solicitors,
- ♦ To be assured that Canopy does not sell its mailing lists
- ♦ To be encouraged to ask questions when making a donation and to receive prompt, truthful, and forthright answers.