

# Philanthropic Engagement and Donor Relations Policy

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**Approved by:** Board of Directors

**Responsible:** National Director

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**To be reviewed:** Annually

## Introduction

At PIH Partners In Health Canada (PIHC), we recognize that fundraising is a vital component of our work to deliver health care and uphold the right to health in communities facing systemic injustice. We are committed to conducting all fundraising activities in a manner that is ethical, transparent, respectful of donor intent, and compliant with regulatory expectations.

This Philanthropic Engagement and Donor Relations Policy reflects our core values and our responsibility to ensure accountability to donors, beneficiaries, and the public. It draws on guidance from the Canada Revenue Agency (CRA), sector standards including the Association of Fundraising Professionals' Code of Ethical Standards, and best practices in charitable governance. The policies outlined herein support our goal of maintaining public trust, safeguarding against conflicts of interest, and ensuring that fundraising resources are managed with integrity and prudence.

By adhering to these principles, PIHC affirms our commitment to ethical fundraising and our obligation to steward every dollar in a way that honours the generosity of our supporters and advances our mission.

## Contents

Complaints Policy .....	4
How to Submit a Complaint.....	4
Complaint Handling Process .....	4
Escalation of Sensitive Complaints.....	4
Annual Review .....	4
Donor Anonymity Policy .....	6
Options for Donor Anonymity.....	6
Internal Protection of Anonymous Donor Identities.....	6
Recognition of Anonymous Donations.....	6
Access and Disclosure .....	6
Managing Conflicts Between Anonymity and Legal Requirements.....	7

Contact Us.....	7
Donor Lists Policy .....	8
Sharing and Disclosure of Donor Information.....	8
Opt-Out and Anonymity.....	9
Security and Access Controls .....	9
Contact Us.....	9
Donor Requests Policy.....	10
Types of Donor Requests .....	10
How to Submit a Request .....	10
Request Handling Process.....	10
Tracking and Documentation.....	11
Contact Us.....	11
Fundraising Activities Policy .....	12
Fundraising Activities.....	12
Ethical Standards .....	12
Disclosure and Reporting .....	13
Third-Party Fundraisers.....	13
Compliance and Monitoring .....	13
Gift Acceptance Policy .....	14
Criteria for Accepting or Declining Gifts.....	14
Types of Gifts Accepted .....	14
Assessment and Approval Process .....	14
Donor Communication .....	15
Contact Us.....	15
Policy for Issuing Tax Receipts.....	16
Minimum Donation Amount for Automatic Receipts.....	16
Procedures for In-Kind Donations .....	16
Compliance with CRA Requirements.....	16
Issuing and Tracking Tax Receipts .....	16
Requesting Tax Receipts for Smaller Donations .....	16
Contact Us.....	17
Payment of Fundraisers Policy .....	18

<b>Payment Structure.....</b>	<b>18</b>
<b>Determining Compensation Levels.....</b>	<b>18</b>
<b>Compliance with Prohibition on Commission-Based Payments.....</b>	<b>18</b>
<b>Contracts for External Fundraisers.....</b>	<b>18</b>
<b>Oversight and Approval of Payments.....</b>	<b>18</b>
<b>Contact Us.....</b>	<b>19</b>

## Complaints Policy

At Partners In Health Canada (PIHC), we are committed to transparency, accountability, and providing an exceptional experience for our supporters. We take all complaints seriously and aim to resolve them in a fair, respectful, and timely manner.

If you have concerns about our activities, programs, fundraising practices, or interactions with our team, we encourage you to reach out using the following contact options:

### How to Submit a Complaint

You may submit your complaint in one of the following ways:

- **Email:** [pihcanada@pih.org](mailto:pihcanada@pih.org)
- **Phone:** 416-646-0666 (Monday to Friday, 9 AM to 5 PM EST)

Please provide as much detail as possible regarding your complaint to help us address your concerns effectively.

### Complaint Handling Process

1. **Acknowledgment**  
We will acknowledge your complaint within **two business days** of receiving it.
2. **Investigation and Resolution**
  - Your complaint will be reviewed by our Donor Relations Team which includes the **Donor Response Specialist and the Sr. Manager, Annual Giving and Engagement**
  - We aim to resolve complaints within **five business days**. If further investigation is required, we will inform you of the expected timeline for resolution.
3. **Documentation**  
All complaints and resolutions will be documented to help us monitor recurring issues and improve our services.

### Escalation of Sensitive Complaints

Complaints involving sensitive matters, such as harassment, ethical breaches, or serious misconduct, will be immediately escalated to senior leadership. These complaints may require further investigation, and confidentiality will be maintained to protect all parties involved. If the complaint relates to the National Director, it will instead be shared with the Chair of the Board.

### Annual Review

PIHC monitors and reviews complaints to identify trends and areas for improvement. A summary of complaints received and addressed will be reported to our senior leadership annually.

We appreciate your feedback and are committed to using it to enhance our work and strengthen our relationship with supporters like you. Thank you for your trust in Partners In Health Canada.

If you have any questions about our Complaints Policy, please contact us at [pihcanada@pih.org](mailto:pihcanada@pih.org) or 416-646-0666.

## Donor Anonymity Policy

At Partners In Health Canada (PIHC), we are committed to respecting and protecting the privacy of our donors, including the right to remain anonymous. This policy outlines the options available to donors for requesting anonymity and how we safeguard anonymous donor information.

### Options for Donor Anonymity

1. **Email Requests:**
  - Donors can request anonymity by emailing [pihcanada@pih.org](mailto:pihcanada@pih.org). We will process the request and ensure that their identity remains confidential in all public recognition and communications.
2. **Online Giving:**
  - Donors making contributions through our website can opt into remaining anonymous by selecting the relevant checkbox during the donation process.

### Internal Protection of Anonymous Donor Identities

PIHC uses a secure donor management system to handle records. The following processes ensure anonymity is maintained internally:

1. **Anonymous Donor Status:**
    - Donors requesting anonymity will have their records flagged with an "Anonymous Donor" status in the system.
  2. **Restricted Access:**
    - Only authorized personnel, such as internal staff, volunteers, and authorized personnel, will have access to sensitive donor information.
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1. **Audit Trails:**
    - The donor management system logs data access and changes. Regular audits are conducted to ensure compliance with this policy and data protection protocols.

### Recognition of Anonymous Donations

1. **Internal Records:**
  - Anonymous donations are tracked and recognized in the donor management system.
2. **External Recognition:**
  - In public communications, anonymous donors will be recognized as "Anonymous" or reported in aggregate without revealing personal details.

### Access and Disclosure

1. **Authorized Access:**
  - Only key personnel with a legitimate need will have access to anonymous donor information.
2. **Third-Party Compliance:**
  - Service providers that handle donor information on behalf of PIHC are required to comply with privacy laws and this policy through contractual agreements.

## **Managing Conflicts Between Anonymity and Legal Requirements**

1. **Regulatory Compliance:**
  - PIHC will comply with legal and regulatory requirements, including requests from authorities such as the Canada Revenue Agency (CRA), by providing only the necessary information.
2. **Donor Notification:**
  - If disclosure of anonymous donor information is legally required, PIHC will notify the donor about the nature of the disclosure and the information that must be shared.
3. **Minimizing Disclosure:**
  - We will limit the disclosure of donor information to the minimum required by law and ensure that privacy is maintained to the greatest extent possible.

## **Contact Us**

For questions or concerns regarding this policy, or to request anonymity, please contact us at [pihcanada@pih.org](mailto:pihcanada@pih.org).

We are committed to protecting the privacy and preferences of our donors and maintaining their trust through secure and transparent practices.

## Donor Lists Policy

At Partners In Health Canada (PIHC), protecting the privacy and security of our donors is a top priority. We are committed to managing personal information with transparency and integrity. This policy outlines how PIHC handles donor lists and personal information in agreement with our Privacy Policy.

### Sharing and Disclosure of Donor Information

**1. No Sale of Personal Information:**

- PIHC does not sell or disclose donor lists or personal information to third parties without your consent, except as outlined in this policy or as required by law.

**2. Public Postings of Donor Involvement:**

- If you choose to share your personal information when you donate, fundraise, create events, sign petitions, or participate in other initiatives, that information may be displayed publicly on our website or other platforms. Public postings may include:
  - Your full name.
  - Your city.
  - The amount donated.
  - Additional details you choose to provide (e.g., comments or a personal story).
- Your contact information (e.g., street address, email, or phone number) will not be publicly displayed.
- As a donor, you will always have the option to remain anonymous.

**3. Service Providers:**

- Your personal information may be shared with certain third-party service providers that perform services on our behalf. These services include:
  - Donation processing.
  - Advertising and marketing support.
- We and our service providers may store and process your information outside of Canada, including in the United States or other jurisdictions.

**4. Legal and Compliance:**

- PIHC and its service providers may disclose personal information in response to lawful requests, such as:
  - Search warrants, subpoenas, or other valid legal inquiries or orders.
  - Investigations into breaches of agreements or contraventions of the law.
  - Situations requiring the prevention, detection, or suppression of fraud.
- Personal information may also be disclosed as necessary for legal claims or to investigate or prevent harm to persons or property.

**5. Sale or Transfer of Charity:**



- In the event of a merger or reorganization related to PIHC's charitable operations, personal information may be transferred as part of the process.

## **Opt-Out and Anonymity**

- Donors have the right to request anonymity and to opt out of any public recognition. You may submit your request by contacting us at [pihcanada@pih.org](mailto:pihcanada@pih.org).
- Marketing emails from PIHC will include an unsubscribe option to update your communication preferences.

## **Security and Access Controls**

1. **Information Security:**
  - PIHC employs security measures to protect donor information from unauthorized access, use, and disclosure.
2. **Access Restrictions:**
  - Only authorized personnel and service providers who require access to donor information for legitimate purposes are granted access.
3. **Compliance with Privacy Laws:**
  - PIHC complies with applicable privacy laws, including the **Personal Information Protection and Electronic Documents Act (PIPEDA)**, to safeguard donor information.

## **Contact Us**

If you have any questions or concerns about this policy or how your personal information is handled, please contact us at [pihcanada@pih.org](mailto:pihcanada@pih.org).

We are committed to maintaining the trust and confidence of our donors by ensuring the protection and responsible use of your personal information.

## Donor Requests Policy

At Partners In Health Canada (PIHC), we value our donors and are committed to accommodating their preferences and requests to ensure a positive and respectful relationship. This policy outlines how donors can submit requests and the types of requests we accommodate.

### Types of Donor Requests

PIHC accommodates the following types of donor requests:

1. **Communication Preferences:**
  - Donors may request changes to the frequency, method (e.g., email, phone, mail), or type of communication they receive.
2. **Gift Designation:**
  - Donors can request that their contributions be allocated to specific programs or projects. While we will strive to accommodate these requests, we cannot guarantee that designation requests can always be honored due to immediate needs and funding priorities.
3. **Anonymity:**
  - Donors may choose to remain anonymous in public recognition and communications.
4. **Opt-Out:**
  - Donors may request to be removed from specific campaigns or mailing lists.
5. **Information Requests:**
  - Donors may request access to reports or updates on the use and impact of their contributions.

### How to Submit a Request

Donors can submit their requests through the following channel:

- **Email:** [pihcanada@pih.org](mailto:pihcanada@pih.org)  
Please include details of the request to help us address your needs efficiently. Additionally, any marketing emails from PIHC will contain an unsubscribe button, allowing donors to easily submit their communication preferences.

### Request Handling Process

1. **Acknowledgment:**
  - Requests will be acknowledged within **two business days** of receipt.
2. **Processing and Approvals:**
  - The **Donor Response Specialist**, will manage requests and obtain any necessary internal approvals.

**3. Fulfillment:**

- Requests will be fulfilled promptly, typically within **five business days**. For complex requests, we will communicate the expected timeline.

**4. Confirmation:**

- Donors will receive confirmation of the action taken in response to their request.

## **Tracking and Documentation**

To ensure accountability and efficiency, PIHC tracks all donor requests through our internal systems. This includes:

- Documenting the request and response.
- Maintaining records for future reference and compliance.

## **Contact Us**

For any questions or to submit a request, please contact us at [pihcanada@pih.org](mailto:pihcanada@pih.org).

We are committed to honouring our donors' preferences and providing transparent, responsive service. Thank you for your support of Partners In Health Canada.

## Fundraising Activities Policy

At Partners In Health Canada (PIHC), we are committed to ethical, transparent, and effective fundraising practices. This policy outlines our approach to fundraising, ensuring all activities comply with regulatory guidelines and reflect our values of integrity, accountability, and respect for our supporters.

### Fundraising Activities

PIHC engages in a variety of fundraising activities to support our mission, which includes but is not limited to:

- **Events:** In-person and virtual fundraising events.
- **Direct Mail Campaigns:** Letters and mailings to share updates and solicit support.
- **Digital Campaigns:** Email, social media outreach, and online giving platforms.
- **Peer-to-Peer Fundraising:** Engaging our supporters to fundraise on our behalf.
- **Corporate and Foundation Partnerships:** Collaborating with corporate sponsors and philanthropic foundations.
- **Donor Programs:** Regular giving, major gifts, and planned giving initiatives.

### Ethical Standards

Our fundraising activities adhere to the following principles:

1. **Compliance with Regulations:**
  - We comply with all relevant guidelines issued by the Canada Revenue Agency (CRA) and other governing bodies.
2. **Transparency:**
  - We provide clear, accurate information about the purpose of fundraising initiatives and how funds will be used.
  - Financial reports, including annual statements and summaries of campaign results, are made available to the public.
3. **Respect for Donors:**
  - We honour the preferences of our donors regarding communication frequency, anonymity, and the use of their contributions.
  - We do not share or sell donor information without explicit consent.
4. **No Private Benefit:**
  - We ensure that fundraising activities do not provide financial gain to any individual or third party.

#### **5. Cost Efficiency:**

- We strive to keep fundraising costs reasonable and ensure resources are used to maximize support for our programs.

### **Disclosure and Reporting**

PIHC is committed to transparency in reporting fundraising activities and outcomes. We:

- File annual financial reports (T3010) with the CRA, accessible to the public.
- We publish our annual audited financial statements including a breakdown of revenue and expenses.

### **Third-Party Fundraisers**

PIHC does not engage third-party fundraisers. All fundraising activities are conducted directly by our staff or volunteers to ensure alignment with our mission and standards.

### **Compliance and Monitoring**

To ensure ongoing compliance with CRA fundraising guidelines, we:

- Train staff on best practices and legal requirements for fundraising.
- Conduct regular reviews of policies and procedures.
- Monitor and evaluate all fundraising activities to maintain transparency and efficiency.

We value the trust and generosity of our supporters. Through ethical and responsible fundraising, PIHC ensures that your contributions make a meaningful difference in advancing health equity and improving lives.

If you have any questions or concerns about our fundraising activities, please contact us at [pihcanada@pih.org](mailto:pihcanada@pih.org) or 416-646-0666.

## Gift Acceptance Policy

At Partners In Health Canada (PIHC), we are committed to maintaining the highest ethical standards when accepting gifts to support our mission of delivering high-quality health care to communities in need. This policy outlines the types of gifts we accept, the criteria for acceptance, and how we manage the gift process.

### Criteria for Accepting or Declining Gifts

PIHC evaluates all potential gifts based on the following criteria:

- **Mission Alignment:** Gifts must support PIHC's mission and objectives.
- **Financial Viability:** Gifts that impose excessive costs, liabilities, or administrative burdens may be declined.
- **Reputation and Ethics:** Gifts that could harm PIHC's reputation or include unethical conditions will not be accepted.
- **Regulatory Compliance:** Gifts must comply with all applicable legal and tax regulations.

### Types of Gifts Accepted

PIHC gratefully accepts the following types of gifts:

- **Monetary Gifts:** Cash, cheques, and electronic transfers.
- **Securities:** Stocks, bonds, and other marketable securities.
- **Bequests:** Planned gifts made through wills or estate plans.

Certain types of gifts require additional review, including:

- **Restricted Gifts:** Gifts with specific conditions or designated purposes.
- **Real Estate:** Property gifts may require appraisals and risk assessments.
- **High-Value Non-Cash Gifts:** Artwork, collectibles, or other items that may require professional valuation.
- **In-Kind Donations:** Non-cash items such as goods and services that align with our needs and mission.

### Assessment and Approval Process

PIHC follows a structured process to assess and approve gifts:

1. **Initial Review:** The Development Team conducts an initial review to ensure the gift aligns with PIHC's mission and policies.

2. **Risk and Value Assessment:** For complex or high-value gifts, professional appraisals and due diligence (e.g., legal and financial review) may be required.
3. **Approval:**
  - Standard gifts are approved by the Development Team.
  - High-value or complex gifts are reviewed by the Executive Director and may require approval from the Board of Directors.

## **Donor Communication**

PIHC is committed to transparency with our donors. We:

- Provide donors with information about our gift acceptance criteria during solicitation and stewardship conversations.
- Publish a summary of this policy on our website.
- Confirm the terms of acceptance in a formal gift acknowledgment letter, including how the gift will be used and any applicable restrictions.

## **Declining Gifts**

PIHC reserves the right to decline gifts that:

- Conflict with our mission or values.
- Present significant financial or legal risks.
- Include conditions that are not feasible or ethical to fulfill.

## **Contact Us**

For questions about making a gift to PIHC or to learn more about our gift acceptance policies, please contact us at [pihcanada@pih.org](mailto:pihcanada@pih.org).

We are deeply grateful for the generosity of our supporters, whose contributions enable us to continue our vital work around the world.

## Policy for Issuing Tax Receipts

Partners In Health Canada (PIHC) is committed to adhering to the regulations set forth by the Canada Revenue Agency (CRA) regarding the issuance of tax receipts. This policy provides information on the minimum donation amount for automatic receipting, procedures for in-kind donations, and how donors can request receipts.

### Minimum Donation Amount for Automatic Receipts

- All donations received online will receive automatic tax receipt.
- PIHC will issue tax receipts for all offline donations of **\$20.00 CAD or higher**.

### Procedures for In-Kind Donations

PIHC welcomes in-kind donations and follows these guidelines to ensure compliance with CRA regulations:

1. **Fair Market Value Assessment:**
  - For non-cash donations, a fair market value (FMV) assessment is required. This may involve professional appraisals for items of significant value.
2. **Documentation:**
  - Donors must provide proof of ownership and details of the donation, including:
    - Description of the item.
    - Estimated value and supporting documents (e.g., receipts).
3. **Receipt Issuance:**
  - A tax receipt will be issued based on the assessed fair market value of the item, excluding any benefits received by the donor.

### Compliance with CRA Requirements

- All tax receipts issued by PIHC comply with CRA regulations, including:
  - Accurate descriptions of donations.
  - Fair market value assessments.
  - Compliance with rules on split-receipting where applicable.

### Issuing and Tracking Tax Receipts

- The **PIHC Development Team** is responsible for issuing and tracking tax receipts.
- All receipts are recorded and monitored in PIHC's secure donor management system to ensure accuracy and compliance.

### Requesting Tax Receipts for Smaller Donations



- Donors who contribute less than **\$5.00 CAD** can request a tax receipt by contacting **[pihcanada@pih.org](mailto:pihcanada@pih.org)**.

## Contact Us

For questions or further information about tax receipts, please reach out to us at **[pihcanada@pih.org](mailto:pihcanada@pih.org)**.

Thank you for your generous support of Partners In Health Canada. Your contributions enable us to continue our mission of delivering high-quality health care to communities in need.

## Payment of Fundraisers Policy

Partners In Health Canada (PIHC) is committed to maintaining ethical and transparent practices in the payment of fundraising staff. This policy outlines the procedures and standards for compensating fundraisers, ensuring compliance with best practices and the regulations set forth by the Canada Revenue Agency (CRA).

### Payment Structure

- Fundraising staff at PIHC are paid on a **salary basis**.
- **Performance-based incentives**, such as commission-based or percentage-based payments tied to donations, are strictly prohibited.

### Determining Compensation Levels

PIHC ensures that compensation for fundraising roles aligns with market rates by:

- **Salary Benchmarking:** Conducting regular reviews of compensation trends using sector-specific surveys (e.g., Imagine Canada, AFP salary surveys).
- **Market Consultation:** Consulting with HR professionals and external experts to evaluate competitive salaries within the charitable sector.
- **Role-Based Evaluation:** Setting salaries based on experience, responsibilities, and qualifications for each position.

### Compliance with Prohibition on Commission-Based Payments

PIHC enforces the prohibition on commission or percentage-based compensation through the following measures:

- **Employment Contracts:** All contracts and job descriptions explicitly state that commission-based payments are not allowed.
- **Monitoring:** HR regularly reviews payroll records to ensure compliance.
- **Policies and Training:** Staff are informed of this policy during onboarding and through periodic compliance updates.

### Contracts for External Fundraisers

- PIHC does not hire external fundraisers.

### Oversight and Approval of Payments

- The **HR Department** is responsible for overseeing and approving all payments to fundraising staff.

- Payment records are maintained in compliance with internal audit procedures and CRA regulations.

## Contact Us

For further information about this policy, please contact [pihcanada@pih.org](mailto:pihcanada@pih.org).

PIHC is committed to maintaining the trust of our donors and staff by ensuring that all compensation practices are fair, ethical, and compliant with applicable regulations.