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## Sample Donor Relations Policy

When a donation comes in to [Organization], a donor will receive:

- A written tax letter within 5 business days of receipt of a check or stock donation.
- An automatic tax email immediately following an online donation.

All donations to [Organization], regardless of size, will receive one of the following within one month of receipt of their donation:

- A handwritten thank you note
- A personal phone call
- A personalized thank you video

Following any [Organization] event, all ticket purchasers and/or donors will receive one of the following:

- A handwritten thank you note
- A personal phone call
- A personalized thank you video
- Or another personalized thank you appropriate for the specific event

For appeals:

- Donors will be segmented into mailing groups in accordance with donation history and/or volunteer history so that we can create more personalized and appropriate messaging.

[Organization] will honor donors' wishes to the extent possible, provided that the intended use of the funds is in keeping with [Organization]'s mission, policies, and procedures. [Organization] will not accept a gift for which the intent cannot be honored.

[Organization] will respect a donor's wish to remain anonymous.

[Organization] staff, members of the Board and Development and Finance committees shall maintain confidentiality regarding all donor information. In addition, this information will be available only on a need-to-know basis, and will be used only to support [Organization]'s development program.

It is [Organization]'s intention to treat all donors according to the attached donor "Bill of Rights."

### **[Organization] Donor “Bill of Rights”:**

In raising funds from the public, [Organization] will respect the rights of donors as follows:

- Donors will be informed of [Organization]’s mission, the way resources are to be used, and the organization’s capacity to use donations effectively for their intended purpose.
- Donors will be informed of the identities of those serving on [Organization]’s governing board, and can expect the board to exercise prudent judgment in its stewardship responsibilities.
- Donors will have access to [Organization]’s most recent annual report, and upon request, can be provided [Organization]’s most recent financial audit.
- Donors will be assured that their gifts will be used for purposes for which they are given.
- Donors will receive appropriate acknowledgement and recognition.
- Donors can be assured that information about their donations will be handled with respect and confidentiality.
- Donors can be assured that [Organization] does not sell its mailing lists.
- Donors are encouraged to ask questions when making a donation and throughout their relationship with [Organization], and will receive prompt, truthful, and forthright answers.

