

# Salt Spring Island Conservancy

Policy Manual

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**Subject: Code of Ethics for Donor Relations**

**Date Passed: June 19, 2008**

The Salt Spring Island Conservancy (the Conservancy) will adhere to the following standards of professional and ethical practice:

**1. Objectives**

This Code of Ethics has been established to encourage directors, staff, volunteers and contractors of the Conservancy to adhere to certain principles, guidelines and practices in their relations with donors or prospective donors.

**2. The Integrity of Directors, Staff and Volunteers**

Directors, staff and volunteers shall act with competence, honesty, integrity and fairness in their relations with donors or prospective donors.

**3. The Role of Directors, Staff and Volunteers**

The primary role of directors, staff and volunteers is to help donors realize their philanthropic goals and to ensure that their contributions respect the objectives of the Conservancy.

**4. Disclosure of Information**

Directors, staff and volunteers have a responsibility to provide donors with accurate and comprehensive information on all aspects of the gift, including the roles of all interested parties.

Directors, staff and volunteers who work on behalf of the Conservancy have a responsibility to inform donors of the mission, the activities of the organization as well as its gift acceptance practices, its processing procedures and fund and endowment management policies.

**5. Protection of Interested Parties**

Directors, staff and volunteers working for or on behalf of the Conservancy shall encourage donors to consult with their personal and professional advisors, especially in the case of significant and complicated gift transactions. Directors, staff and volunteers have a responsibility to cooperate with other professionals who promote their donor's interests as well as those of the organization they represent.

**6. Representation**

Directors, staff and volunteers shall not act for nor claim to represent the Conservancy without knowledge or express consent of the Board of Directors. Directors, staff and volunteers shall not act as donors' representatives without the donors' consent.

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### **7. Terms and Conditions of Gift**

Directors, staff and volunteers shall respect the payment schedule and contribution method chosen by donors, insofar as the methods comply with the Conservancy's gift acceptance policies or guidelines. The directors, staff and volunteers shall allow donors time for reflection and shall respect their decision-making processes.

Directors, staff and volunteers shall obtain consent of the donor before altering the conditions of a gift.

### **8. Confidentiality**

Unless the donor requests otherwise, all donor information will remain confidential. Directors, staff and volunteers shall respect donors' rights to anonymity. Donors' files and the personal and financial information therein contained are the Conservancy's property and shall be kept strictly confidential and in accordance with the British Columbia privacy legislation.

### **9. Conflict of Interest**

At all times, directors, staff and volunteers shall avoid conflict of interest situations, potential conflict of interest situations or the appearance of conflict of interest. Directors, staff and volunteers shall notify all interested parties of any situation that may present a potential conflict of interest.

### **10. Remuneration**

Directors, staff and volunteers who work on behalf of the Conservancy shall not accept any commission, remuneration, nor finder's fees, nor shall they derive direct monetary benefit from transactions concerning donations.