

YWCA Utah Stewardship Policy

I. Purpose

Charitable donations provide an important and unique source of voluntary financial support for YWCA Utah. Truthfulness, donor confidentiality, and responsible stewardship are the foundations for the YWCA's fundraising. Donors entrust funds to the YWCA with the expectation that their gifts will be managed in a fiscally responsible, ethical, and timely manner. Every effort will be made to ensure that the donors' confidence in the YWCA is well placed and that all monies are expended and reported under the guidelines and within the timeframe requested by donors.

II. General Practices

- A. YWCA Utah adheres to the ethical standards identified by the Utah Nonprofits Association and the Association of Fundraising Professionals (AFP) and AFP's Donor Bill of Rights.
- B. The YWCA Board of Directors and CEO will provide careful oversight of the organization and resources entrusted to the YWCA by the community. The Chief Development Officer (CDO) is responsible for managing the development function at the YWCA.
- C. YWCA Utah will strive to act with integrity, openness, and honesty in all relationships, interactions, and transactions with its various donors and publics.
- D. The YWCA has a Board-approved annual budget and written policies governing the following matters: conflict of interest; investment of assets; internal controls; and purchasing practices.
- E. The YWCA's fundraising practices are consistent with and respectful of the intent of donors and prospective donors as well as the YWCA mission and organizational capacity.
- F. YWCA Utah's fundraising costs will be reasonable in terms of percentage of charitable revenue spent on development. The YWCA will strive to maintain a ratio of at least 3 to 1 (three dollars raised for every dollar spent) on fundraising activities.
- G. The YWCA will make its program vs. management and fundraising ratios available for the public upon request.
- H. The YWCA Board will arrange an annual independent audit, and the YWCA will make this audit available to the general public upon request.
- I. The YWCA will strive to create and provide accurate, truthful communications with donors and constituents and will not mislead or knowingly or intentionally misrepresent itself or its work.
- J. The YWCA will be accountable to its donors and the general public and will make available an Annual Report.
- K. The YWCA will register for a Charitable Solicitations Permit with the State of Utah each year, and will respond promptly to any complaints or concerns brought to its attention by donors, the Better Business Bureau, or other interested parties.
- L. The YWCA's donor records will be accurately maintained in a donor database and the YWCA will allocate sufficient resources to provide responsive service to donors at all levels.

III. Donor Privacy

- A. YWCA Utah collects information from donors and potential donors in two ways: directly from individuals during their relationship with us, and from publicly available sources. The amount of data we collect and hold on an individual or entity depends on the frequency and nature of interactions and engagement.
- B. All donors are entitled to view the fundraising data the YWCA holds about them. Requests may be made in writing to YWCA Utah, Attention Chief Development Officer, 322 E 300 S, Salt Lake City, UT 84111.
- C. The YWCA will not sell, trade, or lend its donor, member or prospect lists for use by any other organization, and the YWCA will not send mailings, emails, etc. on behalf of other organizations.
- D. The YWCA takes care to safeguard personal information against loss, theft, misuse and unauthorized access through use of administrative, physical, and security measures.

IV. Gift Solicitation

- A. YWCA leadership volunteers and staff are available to meet with individuals, without obligation, to discuss areas of interest, the YWCA's mission, needs or objectives, types of commitments, and donation options, and they will provide appropriate information and assistance.
- B. The YWCA will make every effort to present accurate and truthful information in all YWCA marketing, communications, and public relations.
- C. The YWCA's priority is to sustain its ongoing operations. While special projects and campaigns may arise, the YWCA will prioritize its charitable solicitations to annual operations, programs, and initiatives that are aligned with the YWCA's mission, vision, and strategic direction.
- D. YWCA leadership volunteers and staff will not seek, encourage, or accept any financial or in-kind commitment that is not in the YWCA's interest and/or is inconsistent with the YWCA's mission, values, or ethical and fiduciary responsibilities.
- E. If the YWCA contracts with professional fundraisers, they must be currently registered with the State of Utah.
- F. Compensation for fundraising personnel and contractors will not be based on a percentage of funds raised or other commission-based formula.

V. Gift Acceptance

- A. Contributions to the YWCA may take the form of one or a combination of the following: cash; pledges; marketable securities; gifts-in-kind; bequests and beneficiary designations under revocable trusts, life insurance policies, commercial annuities, and retirement plans; charitable remainder trusts; real estate; and charitable gift annuities.
- B. The Board of Directors shall review any non-standard contribution before acceptance. Examples of contributions that may require review are gifts of life insurance, real estate, and tangible personal property of significant value.

- C. The YWCA will seek legal or professional advice to assist with acceptance, reporting, and tracking of particular contributions as needed.
- D. When gifts with restrictions are accepted, restrictions will be honored. If circumstances arise which make YWCA unable to honor a restricted gift, YWCA will make every attempt to engage the donor before determining an alternate course of action.
- E. Restricted and unrestricted philanthropic commitments and grants made to the YWCA will be credited to the fiscal year in which they are received or pledged.
- F. No gift commitment will be reported/credited without adequate written documentation from the donor. Documentation may be in the form of a pledge card, letter of intent, personal letter, electronic correspondence, or other document. Exceptions to the preceding require the approval of the YWCA's CEO.
- G. The YWCA's CEO and Board of Directors reserve the right to accept or decline any financial commitment which is offered.

VI. Gift Acknowledgement and Recognition

- A. The YWCA will acknowledge charitable gifts and recognize its donors and supporters in an appropriate, respectful, and timely manner.
- B. To the best of its ability, YWCA Utah will try to consult the donor and obtain permission before any public listing. Any desire for anonymity will be respected.
- C. Due to the differing natures, purposes, and costs of capital and other projects, the naming of buildings, spaces within buildings, programs, positions, etc. will be determined by the CEO, CDO, and Board of Directors.
- D. The ultimate responsibility regarding tax deductibility and/or similar local, state and/or federal legal compliance issues regarding charitable gift commitments rests with the donor.

VII. Plan Distribution

YWCA Board of Directors, CEO, Senior Managers, Development staff, and Business Office and Accounting staff.

Attachments

[Utah Nonprofits Association Standards of Ethics](#)

[Association of Fundraising Professionals Donor Bill of Rights](#)

[Association of Fundraising Professionals Code of Ethical Principles](#)

Approved by YWCA Utah Board of Directors on March 13, 2019