



SIDEKICK
FOUNDATION

Fundraising,
Donor Privacy
and Gift
Acceptance
Policies

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Fundraising Policy

The Sidekick Foundation, Inc. understands that its income must be diverse and so it will actively develop a mix of fundraising streams in a way that:

- Engages and inspires its supporters and respects their interest in and contributions to protecting elephants
- Meets its current funding commitments and provides sustainable income for the long term including any planned expansion of Sidekick's activities
- Manages risk and maximizes return on investment

This policy is intended to provide support to Sidekick's staff and Board of Trustees (and any other formal or informal group, such as a Fundraising Committee) in planning and implementing fundraising activities on behalf of Sidekick. This policy should be read in conjunction with all other Sidekick policies.

1. Fundraising activities and relationship must reflect Sidekick's mission and values.
 2. Sidekick will always work within the law and will strive to achieve recognized 'best practice' in fundraising activities. It will consider membership of 'self-regulatory' bodies when appropriate.
 3. Working within the fundraising policy is part of every employee's and Board of Trustee's responsibilities.
 4. Sidekick will ensure that its contractual arrangements and relationships with partners and suppliers support the principles and values set out within this policy.
 5. Sidekick is committed to knowing the source and destination of its funds. It will not accept a donation or support where it is clear that to do so would: a) be illegal; b) harm Sidekick's reputation; c) harm Sidekick financially, including where the demands of the funder are not proportionate to the size or type of gift; d) go beyond Sidekick's objectives or scope; e) affect Sidekick's independence.
 6. Sidekick will have a clear definition and description of the circumstances in which it will consider accepting or refusing support and for ensuring that the source of large donations is known.
 7. Sidekick values its supporters and is accountable to them and will ensure that their gifts are acknowledged and recognized appropriately.
 8. Sidekick will ensure that gifts are properly processed, recorded and managed and that reporting requirements are met.
 9. Sidekick is committed to transparency, including providing clear, truthful information on its work to supporters and openly reporting how donor funds are spent.
 10. Sidekick respects the privacy of its supporters and is committed to managing donors' information responsibly. Thus, all personal information collected by Sidekick will be confidential and will not be traded or sold to a third party.
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Donor Privacy Policy

The Sidekick Foundation, Inc. respects the privacy of its supporters and is committed to safeguarding personal information and ensuring that donor privacy is protected. This policy is intended to assure donors of this commitment. It applies to all information received by the organisation, both online and offline, as well as any electronic, written, or oral communications.

Sidekick uses donors' information to understand their interests in its mission and to update them on the organization's plans and activities. It may be shared with staff, board members, volunteers and consultants only on a confidential and "need-to-know" basis.

Sidekick assures donors that their names and addresses will not be traded or sold with any third party, nor send donor mailings on behalf of another organisation. To the extent any donations are processed through a third-party service provider, our donors' information will only be used for purposes necessary to process the gift/donation.

It is Sidekick's policy to communicate with donors according to their expressed preferences whenever possible. We will honour all donor requests to be removed from Sidekick's communications. To do so, or if you have comments or questions about this policy, please contact us at info@sidekickfoundation.org.

Sidekick subscribes to the Donor Bill of Rights, which was created by the Association of Fundraising Professionals, the Association for Healthcare Philanthropy, the Council for Advancement and Support of Education, and the Giving Institute.

Donor Bill of Rights

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the non-profit organizations and causes they are asked to support, we declare that all donors have these rights:

- I. To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
- II. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
- III. To have access to the organization's most recent financial statements.
- IV. To be assured their gifts will be used for the purposes for which they were given.
- V. To receive appropriate acknowledgement and recognition.
- VI. To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.
- VII. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.

VIII. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.

IX. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.

Refund of Donations

It is not the normal practice of Sidekick to refund donations. However, if a donor has made an error in making their donation or change their mind about contributing to Sidekick, we will honor their request, where legally possible, for a refund made within 15 business days of the donation being made. To request a refund, an email should be sent to info@sidekickfoundation.org including the date of the donation, name and amount. Refunds are returned using the original method of payment, except cash donations will be returned via check. Donation made by credit card, will be refunded to the same credit card.

Changing business practices and circumstances may require that we make changes to this privacy policy. Thus, we reserve the right to change this privacy policy at any time.

Gift Acceptance Policy and Principles

Sidekick Foundation, Inc. relies on the generosity of its supporters to achieve its mission to protect elephants. Thus, it seeks funding from a wide range of donors, including individuals, corporates, trusts and foundations, governments and other funding agencies.

This Gift Acceptance Policy, Principles and Procedure govern the acceptance of gifts/donations (hereafter referred to as gifts) by Sidekick and partnerships with donors and others. It also provides guidance to prospective donors and/or their advisors when making gifts to Sidekick.

A. Gift Acceptance Policy

1. Sidekick will accept only such gifts as are legal and consistent with its purpose and mission and will not harm Sidekick's reputation, financial health, and independence.
2. Sidekick will refrain from providing advice about matters relating to their gifts, such as tax and other financial consequences.

Sidekick will make every effort to ensure accepted gifts are in the best interests of the organization and the donor. Sidekick subscribes to the Donor Bill of Rights, which was created by the Association of Fundraising Professionals, the Association for Healthcare Philanthropy, the Council for Advancement and Support of Education, and the Giving Institute (see Sidekick's Donor Privacy Policy for more information).

3. All gifts will be reviewed and approved by Sidekick's fundraising staff in collaboration with Sidekick's Executive Director to ensure that they are consistent with Sidekick's mission and consonant with its current or anticipated future programs.
4. Sidekick accepts the following types of gifts, though the list below may not be exhaustive.
 - **Cash gifts** in any form, including by check, money order, credit card, wire transfer, or online.

The following types of gifts will be reviewed to assess their financial and/or legal obligations prior to acceptance:

- **Marketable securities**, which are likely to be sold promptly upon receipt unless otherwise agreed by the Executive Director and/or Board of Trustees
 - **Real estate**, including developed or undeveloped property
 - **Planned gifts**, such as bequests in wills and trusts, charitable gift annuities or charitable remainder trusts
 - **Life insurance or retirement plans**, naming Sidekick as beneficiary
5. Sidekick accepts unrestricted gifts and gifts restricted for specified areas or programs of work. Restricted gifts will be reviewed by Sidekick's fundraising staff in collaboration with the Executive Director prior to acceptance due to special obligations or liabilities that they may pose for Sidekick.
 6. Sidekick will consider refusing gifts that are too restrictive in nature or for which donor requirements cannot be reasonably met. An example of a gift that may be too restrictive in nature is that which is too difficult or expensive to administer in relation to its value.

7. Sidekick will recognize significant gifts and such recognition will be developed in cooperation with the donor and will be consistent with the level of support provided.
8. Sidekick will not accept any support that requires an endorsement of a company or its products.
9. Sidekick will respect the intent of donors wishing to remain anonymous. With respect to such gifts, Sidekick will restrict information about the donor to only those staff or Board of Trustees with a need to know.
10. Sidekick will not compensate any third party for directing a gift or a donor to the organization.

B. Gift Acceptance and Partnership Principles

Sidekick will apply the following principles when reviewing gifts to the organization and/or establishing partnerships with donors or organizations, including corporates:

1. Sidekick will at all times maintain autonomy and independency of action, meaning donor relationships and other partnerships will not impinge on Sidekick's freedom to comment on or address issues determined at its discretion.
2. Sidekick's intellectual property will be protected at all times.
3. Sidekick will maintain transparency about the financial support it receives and with whom it partners.
4. Sidekick and its donors and/or partners will when necessary discuss and agree on the roles and responsibilities of each to achieving our shared aims, including having robust gift or partnership agreements in place.

Required Disclosures for Written Solicitations

A copy of the latest financial report, registration filed by this organization, and a description of our programs and activities may be obtained by contacting us at: Sidekick Foundation, Inc., 4000 W. 106th Street Suite 125-238 Carmel, IN 46032, 317-832-8313. Sidekick Foundation, Inc. was formed in Indiana. If you are a resident of one of the following states, you may obtain financial information directly from the state agency:

Washington: From the Secretary of State at 1-800-332-4483 or <http://www.sos.wa.gov/charities/>.

REGISTRATION WITH A STATE AGENCY DOES NOT CONSTITUTE OR IMPLY ENDORSEMENT, APPROVAL OR RECOMMENDATION BY THAT STATE.