

UFCH Donor Management Policy

北京和睦家医疗救助基金会捐赠者管理政策

Board Approval Date 理事会批准日期: 2021-12-13

Purpose of this Policy

UFCH aims to maintain healthy, long-term relationships with its donors. In order to do that, all UFCH staff should follow the following policy and processes.

Donor Database

When a donation is received, the Donor Database should be updated for the following:

1. Donation Date
2. Donation Amount
3. Donor's Name
4. Donor's Email
5. Donor's Telephone Number
6. Donor's Address
7. Any specific requests about the donation, i.e. intended for a particular program or individual
8. Any information about how the donor came to know UFCH and to donate

Anonymous Donations

Sometimes UFH Patients wish to make an anonymous donation or UFCH receives donations via WeChat and the donor cannot be identified. For non-material donations, the donation will be booked to the account "Anonymous Donations" in UFCH's accounting system. For any material donations, the UFCH Accountant will discuss how to proceed with the UFCH Executive Director.

ThankYou Letters

Whenever possible, a personal thank you letter should be written to the donor and provided within 3 working days. The thank you letter should contain the following:

- Name of donor
- Amount and currency of the donation
- Any specific information about the donation's intended use, i.e. program of for a particular individual
- A sincere thank you from UFCH
- UFCH contact information including website, email, telephone number

Copies of all thankyou letters shall be retained in an organized manner for future reference.

本政策的目的

UFCH 的目标是与捐赠者保持健康、长期的关系。为了做到这一点，UFCH的所有员工都应遵循以下政策和程序。

捐赠者数据库

当收到捐赠时，应更新捐赠者数据库的以下内容。

1. 捐赠日期
2. 捐赠金额
3. 捐赠者的姓名
4. 捐赠者的电子邮件
5. 捐赠者的电话号码
6. 捐赠者的地址
7. 关于捐赠的任何具体要求，即打算用于某个特定的项目或个人
8. 任何有关捐赠者如何认识和睦家基金会并进行捐赠的信息。

匿名捐赠

有时，和睦家医院的患者希望进行匿名捐赠，或者和睦家基金会通过微信接收捐赠，而无法确认捐赠者的身份。对于非物质性的捐赠，捐赠将被记入和睦家基金会会计系统中的"匿名捐赠"账户。对于任何物质性的捐赠，和睦家基金会的会计将与和睦家基金会的执行总监讨论如何进行。

感谢信

在可能的情况下，应该给捐赠者写一封个人感谢信，并在三个工作日内提供。这封感谢信应包含以下内容。

- 捐赠者的姓名
- 捐赠的金额和货币
- 有关捐款用途的任何具体信息，即为某一特定个人提供的项目
- 来自和睦家基金会的诚挚谢意
- UFCH 的联系信息，包括网站、电子邮件、电话号码

Donation Receipt

Upon request of the donor, an official Tax Deductible Receipt may be issued to the donor. The amount of the official tax receipt must not exceed the amount of the cash donation made. In line with Chinese regulations, UFCH Team will make every effort to identify donors that donate RMB 200 or above RMB and try to issue the corresponding receipt within the fiscal year the donation was received. UFCH Accountant will ensure that all receipt are issued in line with the regulation.

RELATED FORMS

- None

END OF POLICY

所有感谢信的复印件应以有组织的方式保留，以供日后参考。

捐赠收据

根据捐赠者的要求，可向捐赠者出具正式的可减税收据。正式税票的金额不得超过现金捐赠的金额。根据中国的规定，和睦家基金会团队将尽一切努力确定捐款200元或以上的捐赠者，并尽量在收到捐款的财政年度内开具相应的收据。和睦家基金会的会计人员将确保所有的收据都符合法规的要求。

相关表格

- 无

政策结束