

## Policy: Donor Complaints

**POLICY** Bridgepoint Health Foundation is committed to responding in a prompt and respectful manner to complaints or concerns from a donor.

### DEFINITIONS

**Donor** includes current, prospective, and past donors.

**Complaint** includes any expression of dissatisfaction on the part of a donor related to the actions of the Foundation with regard to the Donor or Donor information.

**Hospital Complaint** includes an expression of concern relating to the Hospital or patient care provided by the Hospital.

### ADMINISTRATION

1. It is expected that the majority of complaints or concerns will be administrative matters that staff are in a position to address immediately and to the complainant's satisfaction within the existing systems in place in the Foundation. These may include a request to limit the number of solicitations annually, to discontinue solicitations, to correct an address or other contact information, to not be solicited by telephone, to request information, or to inquire as to the status of a receipt. The staff person handling the complaint will ensure that the necessary procedures are followed to address the donor's complaint.
2. Staff members will attempt to satisfy the complainant's concerns with referral to the President & CEO, if warranted. In the event that a complainant remains dissatisfied after being referred to the President & CEO, the complainant will be informed that an appeal in writing to the Foundation's Board of Directors, through either the President & CEO or the Chair of the Board of the Foundation, may be made. The Foundation (President & CEO or the Chair) will respond to the complainant in writing within three business days of the date of the receipt of the written complaint.
3. As the Foundation has adopted Imagine Canada's *Ethical Fundraising & Financial Accountability Code*, a complainant who remains dissatisfied with the disposition of the complaint, has recourse to the Imagine Canada process. The complainant will be informed that s/he may pursue further remedy with Imagine Canada.
4. All contact information required by a complainant to move his/her complaint to the next level will be provided without prejudice by the President & CEO.
5. Complaints or concerns that are of an administrative matter may be considered "one-off" events requiring simple quantitative tracking. Complaints of a more substantive nature - including subsequent complaints from the same complainant on the

same matter, and complainants not immediately satisfied with the resolution proposed, will be documented.

6. The Board of Directors will receive a semi-annual report of all documented complaints and their outcomes including, where appropriate, changes to systems or procedures taken to reduce the incidence of similar complaints in the future.

7. Hospital Complaints received by the Foundation relating to Bridgepoint Health and/or patient care will be documented and referred to the Coordinator, Patient Relations and Quality for attention and/or resolution, and copied to President & CEO of the Hospital.

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## Procedure: Donor Complaints

### PURPOSE

This procedure provides the guidelines for addressing a complaint by a donor to the Foundation.

### SCOPE

The person responsible for handling complaints is the person designated the role of the Bridgepoint Health Foundation Privacy Officer, the Manager, Advancement Services.

In the process of investigating the complaint, respect for the individual and the reputation of the Foundation and Bridgepoint Health are primary concerns. Level of risk and legal considerations are assessed and will determine the process for finding a resolution.

### PROCEDURES

1. The donor issues a complaint in writing, by phone, or by e-mail to a staff member or volunteer.
2. The Manager, Advancement Services receives the complaint, logs it in the complaint database.
3. Within three working days, the Manager, Advancement Services contacts the individual to ascertain details of the complaint and then responds in writing that the complaint is being investigated.
4. The complaint is then investigated to determine the most appropriate resolution.
5. Decision making process – dependent on the scope, risk and severity of the issue

The following steps will be taken as soon as possible and the issues resolved in a timely manner dependent on the complexity of the issue:

- Manager resolves the issue as long as he/she has the authority to do so  
or
- Manager brings the issue to the VP for resolution and it is resolved  
or
- Manager brings the issue to the attention of the President and CEO of the Foundation and it is resolved  
or
- President and CEO of the Foundation brings the issue to the attention of the President and CEO of Bridgepoint Health and the Board and it is resolved
- If legal counsel is required, the decision for consultation will be made by the President and CEO of the Foundation in concert with the President and CEO of Bridgepoint Health

6. The resolution of the issue is logged in the complaint database and reported in writing to the individual who reported the complaint. All efforts are made to find a suitable resolution for the individual and for the Foundation in a timely fashion. Any complaints logged will be reviewed on a weekly basis until resolved.
7. The Foundation Senior Leadership Team will meet quarterly to review the issues raised by any complaints to determine whether additional processes or actions need to be instituted.
8. In accordance with the Ethical Fundraising and Financial Accountability Code, the number, type and disposition of complaints received from donors and prospective donors will be reported to the Finance and Audit Committee and the Board of Directors annually.