

Values, Principles, and Practices

WHO WE ARE, HOW WE WORK, AND WHAT WE DO



We are Committed to the Three Rs: Regulation Compliance, Risk Mitigation, and Reputation Protection

The connection CAF America shares with people around the world through our services is a privilege. We understand that we cannot accomplish our goals as an organization or usher in good will with our clients if we do not hold ourselves to the highest standards. CAF America's three Rs—Regulation compliance, Risk mitigation, and Reputation protection—and we recognize that our continued success in our field depends upon a commitment to conducting **honest** and **ethical** business.

Beyond our three Rs are our organization's values, principles, and practices that drive our employees to do great work, foster an environment of **collaboration, positivity, and respect** and guide us in our everyday practices. All CAF America team members have a responsibility to understand and adhere to our organization's values, principles, and practices because we believe they are the foundation for a successful organization and a uniquely valuable professional experience.

The CAF America team is required to be familiar with our values, principles, and practices and strive to meet these standards every day. Team members are encouraged to seek out guidance or ask questions regarding these standards as needed.

We Build Donor Trust through Service and Innovation

CAF America succeeds because our team is **passionate** about the work we do around the world and how we serve our clients. Our team values **efficiency** and **effectiveness** because we are **dedicated** to helping our donors achieve their philanthropic goals. We prioritize and demonstrate flexibility in our procedures and processes so all of our activities can retain the highest level of quality.

We do what we do best by consistently creating **excellent customer service** experience. Our **commitment to our clients** drives us to develop **creative** solutions to meet their needs. Our team is **forward-thinking and adaptable**. We think ahead and thrive on our ability to serve our clients in new and innovative ways, making our giving solutions the most **progressive and innovative** in our industry.

Arguably the most important part of our work at CAF America is the tangible impact that we facilitate through our services. Without the **hard work and professionalism** of every team member, we would not be able to help millions of people across the globe through our grantmaking. Here at CAF America we strive for the highest levels of **excellence** and **compliance** in all of our work because we know that our individual actions make a real difference for our donors and beneficiaries. As an intermediary, we connect our donors with the charities and causes they want to support. This is what drives our team to **excellence**.

We are Dedicated to Teamwork through Diversity and Inclusion

We care about our team members. Our staff is **friendly and approachable** because we understand the value each individual brings to our organization. Our staff treat each other with **dignity and respect** and we value **diversity** across teams.

We care about **diversity, inclusion, and belonging** because we believe that having varying perspectives within our organization makes us more **innovative and effective**. We do not tolerate discrimination of any kind on the basis of race, religion, sexual orientation, or any other qualitative personal characteristic.

Our team believes in the value of **collaboration** across all teams and seniority levels. We design our meetings, team structure, and office space with the purpose of fostering **communication, relationships, and collaboration** amongst all staff members.

Our leadership and staff believe in **transparency**. Team members are encouraged to ask questions, share perspectives, and respectfully disagree with the knowledge that their opinions and thoughts will be **respected** and considered by all individuals involved.

Our team members are important to us. We promote and care deeply about the health, safety, and welfare of our team. We all share the responsibility of helping to make sure all team members are safe and secure at CAF America, whether in the office, travelling domestically, or traveling abroad. This commitment preserves the safety of ourselves and each of our fellow team members.

Our team members are valued and intentionally encouraged to aspire to do and be their best because we believe in the power to co-create an organization that supports and encourages its staff as individuals.

We Cultivate Experts in Philanthropy and Compliance

CAF America's reputation for **expertise** and industry leadership is paramount to our success as an organization and our team members' as professionals.

Our team is trained to understand our services and the legal parameters that guide our work. Our senior leadership understands the importance of providing regular **educational opportunities** in regulatory **compliance**, international and domestic regulations, and cultural sensitivities related to our work.

We value ongoing **education** because we understand that professional development is key to employee satisfaction and organizational success. Our team engages in regular all staff training on a variety of relevant topics. In addition, we provide all staff members with free education opportunities (webinars, participation in training, etc.) on a regular basis and staff have the option to utilize an annual education reimbursement benefit.

Our organization values the ability to share our **expertise** with our clients and other practitioners who are committed to international philanthropy. We provide **educational opportunities** and programs to others in our industry because we want to empower our professional community and peers to understand the benefits and challenges of international grantmaking in today's regulatory environment.

We Cultivate Experts in Philanthropy and Compliance

CAF America's dedication to **philanthropy** and **excellence** extends beyond our services. We are committed to improving and serving our local community and supporting causes our team members care about.

We engage in regular volunteer events. By volunteering with local organizations who are addressing needs close to home, we have an opportunity to not only build good will in our community, but also build teamwork. Staff are encouraged to suggest volunteer opportunities for all staff participation, to engage in service work regularly, and to use their paid community service hours allotted as part of CAF America's standard benefits.

Our staff is encouraged to participate in **green practices**. We provide public transit benefits, encourage recycling with a variety of bins around the office for ease of access, and discourage unnecessary paper use. All staff members are expected to be intentional with their practices to ensure they are as **eco-friendly** as possible in their business activities.

Notation: Thanks to the spirit of CAF America Values, Principles, and Practices all staff participated in the discussion, formulation, and creation of this document. In that same spirit, it is the intention of CAF America to consistently share this document internally and externally and with all those interested in the success of our organization. Additionally, it is our Senior Staff's intention to review this document annually to monitor any transformation, changes, and growth so that this document consistently reflects the true values, principles, and practices of CAF America.