

Fundraising Policies

1. All types of fund raising, all solicitations, any request involving the planning, construction or expansion of a building or fund to be funded by the private sector gifts will be coordinated by the Formal Fundraising Committee
2. The Committee of Operations under the Executive Director, records and acknowledges all gifts including cash, pledges, securities, insurance policies, real estate and other gifts-in-kind. All gifts are processed by the Financial Officer and screened by the Executive Director before being deposited in any account according to established Gift Processing Policies. The Financial Officer and Treasurer maintain complete and accurate records of every donor and donor confidentiality. The Executive Director reviews in-kind and restricted gifts for acceptance appropriateness. Should a gift be deemed as inappropriate, the donor is counseled to remove or modify the restrictions.
3. The Committee of Operations establishes and maintains up-to-date information regarding the amount of gifts expected or required for a campaign.
4. The Committee of Operations secure independent appraisals and establish tax consequences for in-kind gifts including securities, negotiable assets, real property, books, equipment, etc.
5. Gifts by bequest and information required by attorneys and executors, etc. are referred to the Committee of Operations.
6. The Financial Officer and the Treasurer maintains matching gift information.
7. The Committee of Operations formulates the budgets for fund raising programs with the approval of the Formal Fundraising Committee and the Financial Officer.
8. Any literature used to attract funds shall be coordinated through the Committee of Operations and the Formal Fundraising Committee. The office maintains a schedule of mailings and solicitations.
9. The Executive Director and the Financial Officer with the assistance of the Treasurer are responsible for compiling official records on all private gifts such as 990 tax information on special donors.
10. The Formal Fundraising Committee establishes and maintains prospect and resource files for providing timely and relevant information about prospects and donors.
11. When volunteers are used in the solicitation process, the Committee of Operations assists in the selection, recruitment and training of such volunteers.
12. All cultivation and solicitation of any nature to corporations and foundations must be coordinated through the Formal Fundraising Committee. This includes any contracts between the organization and funding source.

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13. The Formal Fundraising Committee, in coordination with the Executive Director, will prepare any public statements about any gifts including designated and restricted gifts.
14. Securities are transferred in such a manner that the donor and the Executive Director sign specific documentation verifying the specific date and the actual transfer and the traded dollar amount. The Executive Director does not make the decision as to whether the stock is sold or retained.
15. All requests for funding made by the Executive Director or Staff must be cleared by the Formal Fundraising Committee or Board President prior to their submission to the funding source.
16. The Committee of Operations and the Financial Officer make annual reports available to donors.
17. When public recognition of donors is required, the Committee of Operations as well as the Chair of Fundraising will recommend a donor recognition program for Board approval.
18. The Board of Trustees sets the policy on how gifts are allocated within the organization.
19. Biogeographical and financial records stored in files or a data base must be treated as confidential information and not released without written approval of the Executive Director or the CEO.
20. Activities or solicitation requests to secure gifts for programs and activities within the organization's operating budget will be given primary attention by all staff and volunteers.
21. Activities or solicitation requests to secure gifts for programs and activities which are not provided for the organization's approved operating budget must receive special approval by the Board of Trustees prior to their commencement.
22. The Executive Director will be advised of and included in all meetings with prospects and donors.