

## FUNDRAISING POLICIES AND GUIDELINES

[INSERT NAME OF ORGANIZATION] is a nonprofit corporation organized under the laws of the State of \_\_\_\_\_ (the "Organization"). Charitable fundraising is an important source of financial support for the Organization. The following policies and guidelines (the "Policy") govern the Organization's fundraising activities.

### I. Mission

The mission of the Organization is to [insert description of organization's mission]. All of the Organization's fundraising efforts are intended to provide financial support for activities in furtherance of that mission.

### II. Purpose of Policies and Guidelines.

The Organization is committed to maintaining the highest standards of conduct and ethics with respect to its fundraising activities, and the Organization's Board of Directors is responsible for ensuring that the Organization's fundraising activities meet those standards. The Board of Directors has therefore adopted this Policy.

### III. Covered Activities

For purposes of this Policy, the definitions of "fundraising" and "fundraising activities" include, but are not limited to

- A. Mail solicitations;
- B. Email solicitations;
- C. Personal solicitations;
- D. Vehicle, boat, plane, or similar donations;
- E. Foundation grant solicitations;
- F. Phone solicitations;
- G. Donations submitted via the Organization's website;
- H. Donations submitted via another organization's website; and
- I. Government grant solicitations; and
- J. Corporate grant solicitations.

### IV. Donor Relations

It is the Organization's policy that fundraising be respectful of the needs and interests of the donor or potential donor. The Organization will take steps to ensure that gifts will be used

for the purposes for which they were given, and to respect the privacy of individual donors. The Organization therefore recognizes that donors and potential donors have the right:

- A. To be informed of the Organization's mission, the way solicited funds will be used, and the Organization's capacity to use donations effectively for their intended purposes;
- B. To be informed of the identity of those serving on the Organization's Board of Directors and to expect the Board of Directors to exercise prudent judgment in its stewardship responsibilities;
- C. To have access to the Organization's most recent financial statements;
- D. To be assured that their gifts will be used for the purposes for which they were given;
- E. To receive appropriate acknowledgement and recognition that complies with the substantiation requirements for tax-deductible contributions;
- F. To be assured that information about their donations is handled with respect and with confidentiality;
- G. To expect that all interaction with individuals representing the Organizations will be professional in nature;
- H. To be informed whether those soliciting donations are volunteers, employees of the Organization, or hired fundraisers;
- I. To have the opportunity to have their names deleted from mailing lists that the Organization may intend to share; and
- J. To feel free to ask questions when making a donation and to receive prompt, truthful, and forthright answers.

## **V. Federal and State Law Requirements**

The Organization must register, or cause paid fundraisers to register, in each and every state in which the Organization plans to solicit contributions. This necessarily requires that the Organization determine the registration requirements of each state in which the Organization plans to solicit contributions, and to take steps to comply with those requirements. The Organization shall cause charitable solicitation registration applications and annual reports to be filed in a timely manner.

## **VI. Advertising Materials**

The Organization must take steps to ensure that any promotional, marketing, or other fundraising material is clear and accurate. Such materials must accurately describe the Organization, its mission, the purpose(s) for which funds are sought, and the tax-deductible nature of contributions to the Organization.

If material is prepared by a paid fundraiser, the Organization must takes steps to review and approve such material before it is distributed to potential donors.

## **VII. Fundraising Costs**

The Organization must endeavor to hold its fundraising costs to a reasonable level.

## **VIII. Paid Fundraisers**

In selecting paid fundraisers, a charity should use only those entities or individuals who are registered in the state in which the fundraising will occur. Paid fundraisers must also provide good references. The Organization must take steps to continuously monitor the performance of paid fundraisers.

If the Organization engages a paid fundraiser, it must enter into a contractual agreement with that paid fundraiser before funds are solicited. The terms of the agreement must identify:

- A. The purpose of the fundraising which will occur under the contract;
- B. The length of the agreement;
- C. A description of the fundraising methods allowed under the agreement;
- D. An agreement by the paid fundraiser to comply with all applicable state and federal regulations;
- E. The frequency with which the paid fundraiser must report to the Organization;
- F. The terms of the paid fundraiser's compensation (either fixed fee or percentage) and;
- G. Which entity will control the solicited funds.

Regardless of which party holds responsibility for developing marketing and promotional materials, the Organization must ensure that all distributed materials accurately and fairly describes the Organization, its mission, and the purposes for which funds are sought. The materials must also include contact information for the paid fundraiser and the Organization.

## **IX. Changes to Fundraising Policies and Guidelines**

These policies and guidelines have been reviewed and accepted by the Board of Directors of the Organization. The Board of Directors of the Organization must approve any changes to or deviations from these policies.

Approved on the \_\_\_\_\_ day of \_\_\_\_\_, 2008.

**[ORGANIZATION NAME]**

By: \_\_\_\_\_  
Its: \_\_\_\_\_

