

**Policy #: DEV- 102**

**Title: Organizational Fundraising Policy**

Status:	<b>Final</b>
Owner:	<b>Judy Normandin, Director of Development</b>

**I. Purpose**

To enhance the fundraising efforts of Fidelity House CRC.

**II. Introduction**

Fidelity House CRC (FHCRC) is a 501c3 nonprofit human services organization, serving the Merrimack Valley and northeast area of Massachusetts.

The mission of FHCRC is *“to support people with disabilities and those with significant challenges to pursue their goals and live a fulfilled life.”* FHCRC receives financial support from individuals, corporations, foundations, organizations, events, and government sources. All philanthropic donations solicited on behalf of FHCRC are used to advance this mission. The policies and procedures outlined below illustrate how FHCRC is committed to enhancing its fundraising efforts.

**III. Fundraising Policy**

FHCRC adheres to the Association of Fundraising Professionals (AFP) Code of Ethics and the AFP Donor Bill of Rights (Appendix A). In addition to the guidelines below, FHCRC abides by the Generally Accepted Accounting Principles (GAAP) when accounting for all funds including those obtained through philanthropic means.

Any employee or volunteer requesting funds on behalf of FHCRC will do so in a respectful manner that does not impose any pressure or discomfort on the person or entity being solicited. If the request is made in writing, the employee or volunteer must gain approval from their immediate supervisor or the Director of Development to confirm that the message and means are an appropriate method of soliciting that individual or group. If the solicitor chooses to communicate via phone or in person, that meeting and the content of the conversation should be approved in advance by the individual’s supervisor or the Director of Development.

If the person being asked declines the opportunity to give, the solicitor should respect the decision while also thanking them for their attention and continued interest in FHCRC’s mission.

Donors will be informed of FHCRC’s mission and how donated funds will be used. Contributions to FHCRC will be used for the purposes for which they are given.

Any gift received by FHCRC will be counted as unrestricted unless otherwise stated by the donor in writing. In the case that a donor chooses to place restrictions on their contribution or give to a specific fund or program, those designations will be honored and the finance department will be notified. If FHCRC is unable to accommodate the donor’s request, a representative will contact the donor to discuss alternative designations for the contribution. Any individual interested in creating an endowment fund must gain approval from the President and CEO in order to first, determine that the fund and its purpose are in line with the mission of FHCRC; and second, ensure that FHCRC has the capacity to manage that fund.

As a result of the complex nature of a “planned gift” or bequest any individual choosing to leave FHCRC part of their estate will be encouraged to seek his or her own outside legal and tax advice before its execution.

FHCRC will make every effort to maintain the wishes of any donor indicating that they chose to give their gift anonymously. In such an instance the donor’s listing will be adjusted in the database to indicate such and the individual will be listed in any printed materials made available to the public as ‘Anonymous’.

As a 501c3 nonprofit, all donations to FHCRC are tax deductible to the fullest extent of the law. Written acknowledgements shall be issued for all donations from the development department in a timely fashion. However, donors are encouraged to review their donations and deductions with a tax consultant or financial advisor.

#### **IV. Board Member Expectation**

FHCRC Board members are asked to submit a board member expectation form (Appendix B) outlining their commitment to participate in fundraising efforts throughout the year and to make an annual contribution to FHCRC. The expectation for all board members is that they will actively participate in fundraising and will solicit funds by reaching out to their personal and business network when appropriate.

#### **V. Donor Database**

When a donor makes a donation, it will be recorded in the donor management system noting the date, amount, campaign or solicitation, and purpose.

#### **VI. Fundraising Event Policy**

FHCRC regularly plans events to raise funds and to broaden the base of donors, partners, and contacts, in addition to building greater awareness of the organization’s mission. These events will go forward only if it is clear that they will not result in a financial loss for FHCRC. Items donated for events will be considered in-kind gifts unless a cash donation is made. All ticket sales and donations will be handled by FHCRC’s Development Office unless otherwise agreed upon by the Director of Development.

#### **VII. Donor Privacy**

In recognition of its obligation to protect the privacy of its donors, FHCRC pledges to handle information about donations with respect and confidentiality.

##### *Personal Information of Donor*

FHCRC collects personal information such as names, company names, titles, addresses, telephone numbers, fax numbers, email addresses, and payment information from donors. By submitting personal information to FHCRC, the donor authorizes FHCRC to collect, use and disclose personal information according to the conditions detailed in this organizational fundraising policy.

##### *How FHCRC Uses Personal Information*

FHCRC uses personal information collected from donors to respond to donor inquiries, to issue donation receipts, to help in deciding who receives future fundraising appeals, to help organize fundraising events, and to inform donors of new programs and services. Donor information is also used to determine the appropriate level of recognition for each donor listed in event programs and other print material as well as invitations to events.

### *Sharing of Donor Information*

FHCRC utilizes third party vendors, such as printers and mailing services companies, to execute mailings and email communications. Each vendor is required to keep personal information confidential and to follow all FHCRC fundraising policies. FHCRC does not, and will not, sell donor information to third parties.

### *Gift Acknowledgement*

FHCRC acknowledges every contribution with a letter or email. Copies of the acknowledgment letters for all gifts will be stored on the FHCRC network for three years.

In addition, FHCRC has a “Stewardship Thank You Program” whereby staff or board members place thank you calls to donors or provide small tokens of appreciation throughout the year, in accordance with the amount and frequency of donations.

### *Donor’s Right to Limit Contact by FHCRC*

Donors may request not to be contacted by FHCRC in connection with any of its programs, updates, or fundraising appeals. Requests not to be contacted by FHCRC can be sent in writing to the Development Office, Fidelity House CRC, 439 South Union Street, Suite 401, Lawrence, MA 01843; or via email to [advocate@fidelityhhs.org](mailto:advocate@fidelityhhs.org) or by calling 978-685-9471. To unsubscribe from email communications, donors may click the link at the bottom of any email sent or submit a request in writing, via email, or via phone as stated above.

### *Donor Listing*

FHCRC will make every effort to honor donor preferences how donor names and titles are listed. Donors may request changes to the current listing, or request to be listed anonymously, by contacting the Development Office, Fidelity House CRC, 439 South Union Street, Suite 401, Lawrence, MA 01843; or via email to [advocate@fidelityhhs.org](mailto:advocate@fidelityhhs.org), or by calling 978-685-9471.

## **VIII. Disclaimer**

Notwithstanding other provisions of this privacy policy, FHCRC may disclose personal information in special cases when we find it necessary to identify, contact, or bring legal action against someone who may be violating this agreement or may be causing injury to or interference with FHCRC, its constituents, or anyone else that could be harmed by such activities. FHCRC reserves the right to disclose any information to law enforcement or other parties that FHCRC, in its sole discretion, believes is required or appropriate in order to comply with the law.

## **IX. Contact**

FHCRC’s organizational fundraising policy may be changed or updated from time to time. Questions about the policy may be directed to the Development Office, Fidelity House CRC, 439 South Union Street, Suite 401, Lawrence, MA 01843; or via email to [advocate@fidelityhhs.org](mailto:advocate@fidelityhhs.org) or by calling 978-685-9471.

# A Donor Bill of Rights

*PHILANTHROPY* is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

## I.

*To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.*

## II.

*To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgement in its stewardship responsibilities.*

## III.

*To have access to the organization's most recent financial statements.*

## IV.

*To be assured their gifts will be used for the purposes for which they were given.*

## V.

*To receive appropriate acknowledgement and recognition.*

## VI.

*To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.*

## VII.

*To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.*

## VIII.

*To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.*

## IX.

*To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.*

## X.

*To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.*

### DEVELOPED BY

Association of Fundraising Professionals (AFP)  
Association for Healthcare Philanthropy (AHP)  
Council for Advancement and Support of Education (CASE)  
Giving Institute: Leading Consultants to Non-Profits

### ENDORSED BY

(In formation)  
Independent Sector  
National Catholic Development Conference (NCDC)  
National Committee on Planned Giving (NCPG)  
Council for Resource Development (CRD)  
United Way of America



**BOARD MEMBER EXPECTATION FORM**

<p><b>As a board member, I agree to serve on the following committee(s) this year:</b></p> <p> <input type="checkbox"/> Fundraising Event                    <input type="checkbox"/> Board Development                    <input type="checkbox"/> Finance                    <input type="checkbox"/> Fundraising             </p>	
<p><b>I understand that my financial commitment is necessary to ensure the success of Fidelity House Human CRC.</b></p> <p>In order to achieve 100% participation of the board, I personally pledge      \$ _____ *</p> <p>My company or I will participate in the following:</p> <p> <input type="checkbox"/> Registration for Annual Event      \$ _____  <input type="checkbox"/> Sponsorship of Annual Event      \$ _____  <input type="checkbox"/> Other Sponsorship      \$ _____                 </p> <p style="text-align: right;"><b>TOTAL \$ _____</b></p> <p>*For my personal gift, I prefer: <input type="checkbox"/> One Payment    <input type="checkbox"/> Quarterly Payments    <input type="checkbox"/> Monthly Auto Pay</p>	
<p><b>I would like to help with donor identification, cultivation, and stewardship (check all that apply):</b></p> <p> <input type="checkbox"/> Send an email to colleagues, friends and family members to ask for their donation to the Fidelity House Giving Tree Campaign and/ or the annual fundraising events  <input type="checkbox"/> Invite colleagues, friends and family to fundraising and cultivation events  <input type="checkbox"/> Host an informational event in my home  <input type="checkbox"/> "Like," "comment," and "share" Fidelity House CRC social media posts  <input type="checkbox"/> Record a 30 – 60 second video about why you love and support Fidelity House CRC  <input type="checkbox"/> Other                 </p>	
<p><input type="checkbox"/> <b>I understand that Board meeting attendance is important to the success of the agency and a requirement of Board membership.</b></p>	
<p>_____</p> <p>Board Member Signature</p>	<p>_____</p> <p>Date</p>

<b>Senior Manager Review: Executive Team</b>	<b>4/16/2019</b>
<b>Approved: Brad Howell</b>	<b>5/14/2019</b>