

# HSCA Fundraising Policies

## **Fundraising Plan Development**

A Fundraising Plan will be established each year, per the Governance Calendar and approved by the Board as part of the budget approval process.

Any individual or group wishing to do a fundraising event must submit their idea and plan in writing two months before plan development begins. The request should include a detailed plan of the event, including: dates, times, location, admission prices, a schedule of activities, volunteer requirements, promotion methods, a sample of promotional materials that will be used, and an event budget.

The fundraising program should be staffed and funded at a level consistent with fundraising expectations

## **Donor Relations**

Donors' wishes will be considered to the extent possible, as long as their intended use of funds is in keeping with the purpose of HSCA and with the policies and priorities of the organization as expressed in the Operational Plan. HSCA will not accept a gift for which it is incapable of honoring donor intent.

HSCA will survey donor satisfaction (including former donors) annually and monitor and report on key indices to better serve organizational donors.

## **Acknowledgment**

All gifts, regardless of value, form, or stipulations, shall be acknowledged by HSCA in the form of a written substantiation, including a gift receipt.

HSCA will comply with current government regulations regarding acknowledging quid pro quo contributions.

## **Acknowledgement of Major Donors (Gifts over \$1,000)**

Each major donor will have at least one face-to-face 'thank you' meeting with a staff member and Board member annually.

## **Public Notice**

HSCA will respect a donor's wish to remain anonymous.

## **Confidentiality**

The fund development unit shall maintain confidentiality concerning all correspondence regarding contributions, gift records, prospect cards, and other data on donors, and will ensure that this donor information is used on a need-to-know-basis only for the support of fund development for HSCA.

The privacy of donors should be respected, and no personal information about donors (except as required by federal and state reporting requirements) should be released to third parties without the donors' written authorization.

### **Gift Acceptance**

The Executive Director of HSCA and the Board has the authority to solicit and/or accept gifts on behalf of HSCA in order to further the mission of the organization.

There is a potential that the acceptance of certain gifts could compromise the ability of the organization to accomplish its goals or could jeopardize its tax-exempt status. Hence, HSCA will not solicit or accept gifts from individuals or entities whose practices, policies, or operations are deemed unacceptable and contrary to the values, mission, and well-being of the organization.

### **Sponsorships and Endorsements**

HSCA will not solicit or accept gifts from individuals or entities whose practices, policies, or operations are deemed unacceptable and contrary to the values implicit in its mission.

HSCA will not endorse the policies or views of its funders or donors unless they are consistent with written organizational standards.

HSCA will not promote corporate products without approval by the board.

### **Board Member and Fundraising**

Nonprofit organizations rely on donations for their income. As organizational leaders Board Members have the responsibility of setting an example for giving and creating a culture that supports generosity of finances. To achieve this, it is the policy of this organization for all board members to give an annual financial gift at a level that is reflective of their circumstances and other commitments. Personal gift amounts are confidential.

In addition to personal giving; Board members are expected to volunteer 10 hours per year, as their schedule and skills permit, to the implementation of the annual Fundraising Plan.

### **Event Record Keeping**

Records of expenditures and revenues shall be kept for all fundraising activities and all events are expected to be self-supporting.

The Executive Director shall review the financial records for each fundraising activity annually and determine if the activity is profitable or should be eliminated. All events are expected to increase their net revenue each year, if after 3-years it is determined that net revenue is not increasing per the effort involved, the event will be eliminated from the fundraising plan.

### **In-Kind Donations**

HSCA accepts equipment that can be of use or can be quickly sold. This includes office furnishings, vehicles, fixtures, and other operational equipment.

The donee must supply an appraisal for equipment or goods contributed over \$5,000. If the value appears unreasonable HSCA retains the right to adjust the value for its accounting purposes.

In-kind donations are to be used exclusively for the organization and are not to be used by board members, volunteers or employees.

### **Fundraising Events and Volunteers**

1. Volunteers assisting with a fundraising event must have a current list of emergency contacts on file.
2. Volunteers must adhere to the list of acceptable event promotion methods assigned by the event coordinator to an event. Volunteers should seek permission from the event coordinator before using a new/different promotion method. This is done to ensure compliance with legal standards regarding solicitation and to ensure that all information on the promotional materials is accurate.
3. Volunteers should at all times act appropriately, be polite, stay positive, and obey the instructions of the event coordinator if they are assisting with a fundraising event. If in doubt, they should check with the coordinator first before taking an action.

### **Fundraising Event Volunteer Policies**

1. Volunteers must spend at least 3 months volunteering within the shelter itself before they are allowed to assist with shelter fundraisers. This is done in order to ensure that the volunteer understands the goals, mission, and daily activities of the shelter, and can answer guest's questions with the confidence and firsthand knowledge that comes with this length of experience.
2. Volunteers interested and available to assist with a fundraising event must sign up on the sheet posted for the event. The event coordinator will decide how many volunteers are needed for the event, and will contact those chosen to work out the details of times and shifts. Volunteers not chosen will be on the waiting list in case of an opening or cancellation, and/or may be contacted to assist with pre-event promotions.
3. Volunteers are required to wear an apron, vest, and/or name badge with the shelter name and logo before, during, and immediately after a fundraising event. These items will be supplied by the shelter and must be returned to the event coordinator after breakdown of the event. This is done for security purposes, as well as to make sure guests at the event know who to speak with concerning a question or issue.
5. Fundraiser volunteers are required to contact the event coordinator at least 2 hours before event setup begins if they will be unable to help with the event. Failure to do so may cause a critical shortage of help at the event, and therefore may prompt the event coordinator to not allow that volunteer to help with future events.

6. Events may only be cancelled with the approval of the Director of Development (or Executive Director)

Adopted: January 2011