

## **POLICY 390 SOLICITATION MATERIALS AND DONOR COMMUNICATIONS**

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Revision Date(s):

### **POLICY**

Blessman International shall assure that all solicitation materials and other donor/public communications are accurate and truthful.

#### **Solicitation Materials**

All solicitation materials and other donor/public communications shall clearly identify Blessman International and its stated mission and purpose. All solicitation or promotional materials shall provide a means for donors and others who receive such materials to request that their names be deleted from similar mailing, faxes, or electronic communications in the future. The organization shall immediately remove a donor's name from any lists upon request. The organization shall provide donors with information on the website regarding how they may request that their names and contact information not be shared outside the organization.

#### **Restricted Purpose of Donations**

Solicitation materials shall clearly state whether the funds they generate shall be used to further the general programs and operations of the organization or to support specific programs or initiatives. A donor may indicate through a letter, a written note on the solicitation, or a personal conversation with the solicitor or another official of the organization how he or she expects the contribution to be used. In the event that a donor's intention is verbally stated, the organization shall require that staff member(s), volunteer(s), or other person representing the organization in the solicitation to document the conversation. All such documents shall be signed, dated, and retained with the other donor records.

As a general rule, the organization shall routinely seek and accept donations that are unrestricted. The organization shall assure that all donations accepted for restricted purposes shall be used for the purposes consistent with the donor's intent, whether as described in the relevant solicitation materials or as specifically directed by the donor. The organization shall carefully review the terms of any contract or grant agreement before accepting a donation. If the organization determines it is unable or unwilling to comply with any of the terms requested by the donor or a grantor, the organization shall attempt to negotiate any necessary changes prior to concluding or agreeing to the transaction.

### **Donor Acknowledgement**

The organization shall provide donors with specific acknowledgements of all charitable contributions in accordance with IRS requirements, as well as information to facilitate the donors' compliance with tax law requirements. The organization shall provide any donor proof of the organization's tax-exempt status by providing a copy of the IRS determination letter upon request.

### **Gift Acceptance**

The organization shall make available to donors and prospective donors with clear criteria the organization uses to determine whether acceptance of a gift would compromise its ethics, financial circumstances, program focus, appropriateness to the organization's exempt purpose, or other pertinent factors as determined by the Board of Directors. In the event that the organization is unable or unwilling to use the contribution as stated in its appeal or in the donor's communications, the Development Director shall promptly contact the donor and request permission to apply the gift to another purpose or offer to return the gift.

### **Solicitor Training and Supervision**

The organization shall provide appropriate training and supervision of the people soliciting funds on its behalf to ensure that they understand their responsibilities and applicable federal, state and local laws, and do not employ techniques that are coercive, intimidating, or intended to harass potential donors. This policy applies to persons employed by Blessman International, contracted fundraising individuals or organizations, and those serving on the Board of Directors.

### **Outsourced Solicitation Professionals**

In cases in which the organization uses the services of an outside fundraising professional, the organization shall require the person or entity to sign a contract and participate in the solicitation training program of the organization.

### **Solicitor Compensation**

The organization shall not compensate internal or external fundraisers based on a commission or a percentage of the amount raised. If the organization provides bonuses for exceptional work in fundraising, the criteria for such bonuses shall be clearly based on the quality of the work performed rather than on a percentage of the funds raised. All bonuses to internal or external fundraisers shall be approved by the Board of Directors.