

Development Policies and Procedures

Purpose:

The purpose of this policy is to:

- Establish procedures for all fundraising on behalf of Habitat for Humanity of Greater Baton Rouge(HFHGBR)
- Establish guidelines and procedures for accepting gifts
- Establish rules for donor anonymity

Fundraising Policies and Procedures

Habitat for Humanity of Greater Baton Rouge's fundraising is managed by the Development Director or in the absence of a Development Director the Executive Director. He or she is responsible for coordinating all fundraising activities including the overall supervision and management of fundraising programs, administration of staff, and management of cultivation, solicitation and proper stewardship of all donations.

Fundraising Guidelines:

1. All fundraising must comply with national, state and local laws.
2. The fundraising activity must offer a benefit that is consistent with Habitat's mission.
3. Fundraising events must be clearly defined by Habitat's name and logo.
4. All fundraisers must be pre- approved by the Executive Director.

Fundraising Policy:

HFHGBR is dedicated to the highest standard of ethical conduct in fundraising. Staff members advocate these standards by incorporating them into all fundraising activities and by serving as models of professionalism. Funds shall be solicited in a respectful manner without pressure. All third parties not directly affiliated with HFHGBR who wish to solicit funds on behalf of the organization must acquire written permission from the HFHGBR Executive Director or Development Director prior to beginning any fundraising activities. Donor-designated restrictions on contributions shall be honored. Habitat for Humanity of Greater Baton Rouge is a non-profit 501(C) (3) organization and contributions made to the organization are tax deductible to the fullest extent of the law. Written tax receipts shall be issued for all donations. If a donor receives anything in exchange for their donation, such as dinner or event admission, the tax receipt shall clearly state what portion of the donation is tax deductible.

Fundraising Procedures

Upon receipt, all monetary donations shall be forwarded to the Administrative Assistant to be entered into the Log Book. After all funds have been accounted for, a copy of checks, cash receipts and any other correspondence accompanying the gifts shall be delivered to the Development department. Once gifts are recorded an acknowledgement will be sent to the donor that will serve as a tax receipt as required by the Internal Revenue Service. All donations will then be entered into Sage Fundraising software. All monetary donations are recorded and deposited according to accounting procedures. All donor-designated restrictions shall be communicated to the accounting department so that they may be recorded and governed appropriately. All requests for donors to remain anonymous shall be honored by flagging the gift in the donor database. All in-kind gifts that are accepted by HFHGBR shall be recorded and acknowledged according to development and accounting procedures.

Donor Privacy Policy

Any information supplied to Habitat for Humanity of Greater Baton Rouge by donors will be used solely to fulfill their donation and shall not be shared for any reason unless permission is granted by the donor. All requests to remain anonymous shall be honored. HFHGBR will not sell or share donor lists. Donors who supply HFHGBR with their postal address or email address may be contacted periodically for HFHGBR solicitation purposes and/or information regarding upcoming events. All donors have the option to be placed on the "do not solicit" list. Donors may also request to be permanently removed from HFHGBR's mailing list by contacting us via email, phone, or postal mail. All requests to be removed from HFHGBR's mailing list shall be honored. Donors who supply HFHGBR with their telephone number shall only be contacted by telephone regarding donations they have made or about events. HFHGBR does not participate in telephone fundraising.

Habitat Brand and Logo Usage

The Habitat logo may only be used with written permission of the Executive Director. The Habitat logo is a valued asset of the organization and in no way may be modified. For questions regarding the logo, proper usage, and design of the logo, please refer to the Habitat Brand Builder's Handbook on My Habitat.

Gift Acceptance

Habitat for Humanity of Greater Baton Rouge has the right of refusal of any gift. We encourage support, however, encumbering gifts that may generate costs or liabilities in excess of the benefit provided, or that are restricted in a manner not consistent with the mission, purpose, goals, or policies of HFHGBR will be refused.

Authority to Accept Gifts:

1. An outright, unrestricted cash gift of any amount may be accepted by the Executive Director, Development department or members of the Board.
2. A non-cash gift (including personal property, real property, stock, or a planned gift vehicle) may be accepted by the Executive Director but must be approved by the Executive Committee or Board.

Professional Relationships:

HFHGBR will not draft legal documents for any donor or planned gift. In accordance with IRS statutes, HFHGBR is not allowed to assign value of any gift. In most cases, any and all fees associated with appraisals, assessments or Planned Gift legal documents will be paid by the donor before the gift is accepted. All documents submitted by the donor's advisors will be reviewed by HFHGBR's legal counsel.

Gifts of Cash:

1. Gifts in the form of cash and checks shall be accepted regardless of amount unless there is a question as to whether the donor has sufficient title to the funds or is competent to legally transfer the funds.
2. All checks must be payable to Habitat for Humanity of Greater Baton Rouge and shall in no event be made payable to an employee, agent, or volunteer for the credit of Habitat for Humanity of Greater Baton Rouge.

Gifts of Securities:

1. Securities may be accepted after review by the Executive Director, Treasurer, and Board President.
2. Such securities may be subsequently disposed of only with the approval of the Board.
3. No commitments shall be made for disposition of such securities prior to completion of the gift.

Gifts of Real Property:

1. The Site Selection Committee will review the acceptability of all proposed real estate gifts and make recommendations to the Executive Director and the Board of Directors. No gift of real estate shall be accepted without a vote of the Board of Directors.
2. No gift of real estate shall be accepted without clear title being established by an attorney and title company.

Planned Gifts:

1. HFHGBR will involve itself only in recognized legal and approved forms of Planned gifts which are authorized by the Internal Revenue Code and controlled by subsequent IRS regulations. HFHGBR will not engage in doubtful arrangements which could jeopardize its exempt status and financial stability or the donor's tax advantage.
2. In all gift arrangements the interest and wishes of the donor come before that of HFHGBR. Representatives of HFHGBR will assist donors in making gifts and will always urge the donors to seek professional financial and legal counsel for their own situation. All agreements that involve a continuing responsibility on the part of HFHGBR will be reviewed and approved by its own legal counsel.
3. HFHGBR will not employ professional fund raisers or the payment of finder's fees for Planned Gifts.
4. HFHGBR will observe and respect the confidentiality of all donor negotiations and gift arrangements.
5. Planned gift types include Bequests, Life Insurance, Irrevocable or Revocable Trusts, Life Estates, Charitable Remainder Annuity and Unitrusts, Charitable Lead trusts (Annuities). All planned gift vehicles will be reviewed by the Treasurer and Board President. HFHGBR will not itself act as the trustee for a trust but will make use of an independent foundation or agent, e.g., the Baton Rouge Community Foundation.
6. Bequest gifts of any amount may be accepted. Donors are encouraged to leave their charitable bequests by Will as unrestricted, rather than specifying program areas. HFHGBR retains the right to refuse a restricted bequest if it is deemed incompatible with Habitat goals.
7. Planned gifts can be funded with cash, marketable securities, real estate, notes, mortgages and contracts, and miscellaneous tangible personal property. The funding source for the planned gift will be reviewed to ensure that the donor has sufficient title to the assets and is competent to legally make the gift.

Third Party Fundraising Events

While fundraising is a necessary function to support the work of Habitat for Humanity of Greater Baton Rouge (HFHGBR), and the affiliate welcomes the efforts and suggestions of all partnering organizations that are willing to undertake this important function, it is equally important that ALL events bearing the "Habitat" name meet the highest standards of the organization.

The HFHGBR name and logo are the only permitted representation that may be used in local efforts. Any local customization is NOT permitted. Use of the name and logo in any form including press releases must receive pre-approval from the Executive Director or Development Director. All publicity must receive prior approval.

Partner organizations may raise funds in support of HFHGBR by scheduling and holding events or special promotions. These events and promotions may not be undertaken and executed without the knowledge and permission of the HFHGBR Executive Director or Development Director. Events may not be approved if they present a conflict of scheduling for key personnel at HFHGBR, compete with other events, foster relationships not intended by HFHGBR, or misrepresent the mission or objectives of Habitat.

Sponsorships and or solicitations from businesses, corporations, churches or schools are not permitted without prior approval of the Executive Director. Many local businesses already donate to Habitat and preservation of these relationships is crucial.

Each event must have written approval of the Executive Director. Acceptance is wholly conditional upon the partnering organization's full compliance with all the bylaws governing HFHGBR, as well as any specific conditions.

Any event that is determined to violate any of the conditions stated above will be considered *unsanctioned* by HFHGBR.