

POLICY 390

SOLICITATION MATERIALS AND DONOR COMMUNICATIONS

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Functional Area: Fundraising, Accounting, Management, Marketing

POLICY

Blessman International shall ensure that all solicitation materials and other donor/public communications are accurate and truthful. We do not sell or exchange donor information.

Solicitation Materials

All solicitation materials and other donor/public communications shall clearly identify Blessman International and its stated mission and purpose. All solicitation materials shall provide a means for donors and others who receive such materials to request their names be removed from similar mailings. The organization shall immediately remove a donor's name from any lists upon request.

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. If 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.

Generally, 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. 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. If the organization is unable or unwilling to use the contribution as stated in its appeal or in the donor's communications, Fundraising staff 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 CEO and Management.

PROCEDURE

- Blessman International management staff shall assure that all appropriate staff members and volunteers, especially those staff members and volunteers involved in the solicitation of donations, are familiar with the mission, policy, procedure, and forms of Blessman International.
- Blessman International Fundraising staff shall ensure that all donor communications on the organization's website are accurate, truthful, and current.
- Training provided for all persons or entities soliciting on behalf of the organization shall include, but not be limited to:
 - Instructions regarding what information to provide to prospective donors, including but not limited to:
 - Organization's name and address;
 - How the donor can learn more about the organization;
 - The purposes for which donations shall be used;
 - Whether all or part of the donations may be tax-deductible;
 - Who the donor may contact for further information;
 - Treatment of donations with quid pro quo payments;
 - Communication concerning quid pro quo payment treatment prior to acceptance of the donation;
 - Fair market value of the goods or services received shall be deducted from the tax-deductible portion of the gift;
 - Donated materials and/or time;
 - The donor shall receive an acknowledgement of each in-kind donation;
 - Such acknowledgement shall not attach an appraised monetary value to the donor;
 - Respectful treatment of donor concerns;
 - Review Donor Bill of Rights at least every three years;
 - Review the Privacy Policy at least every three years;
 - Avoidance of providing specific legal, financial, and tax advice to individual donors;
 - Encouragement of donors consulting their own legal counsel or other professional advisors before finalizing a contribution;
 - No use of coercive or abusive language or strategies to secure contributions;
 - No misuse of personal information about potential donors;
 - Avoidance of pursuing personal relationships that are subject to misinterpretation by potential donors;
 - Avoidance of misleading potential donors about the needs of the organization or the intended

use of donations;

- Contracts binding the services of outside fundraising professionals shall include, but not be limited to:
 - Responsibilities of the organization and the outside fundraising professional(s) as related to the fundraising campaign or endeavor;
 - Agreement on the part of the fundraising professional to abide by:
 - Any registration and reporting requirements of the jurisdictions in which fundraising shall be conducted;
 - Federal restrictions on telephone, email, or fax solicitations;
- Verification that the outside solicitor is registered as required by any state in which the solicitor shall be seeking contributions.