

Number: P- 9 Approved: 8/16/09

Cross Reference: Fin. Comm

Schedule for Review:

#### TITLE

**Fundraising** 

#### **POLICY**

Planned Parenthood of the Great Northwest conducts its fundraising activities ethically and by adhering to all applicable laws and regulations regarding fundraising in Washington, Idaho, and Alaska. PPGNW respects the right of our donors to expect privacy and confidentiality. PPGNW will follow the wishes of donors regarding use of their gifts, but PPGNW will encourage donors to give to the organization, and not restrict their gifts to a particular health center or geographical location. PPGNW does not lend, sell or otherwise distribute our donor lists without prior approval of the Board of Directors, or except as required by law.

Gifts of all kinds to PPGNW are gratefully accepted, though under certain circumstances PPGNW reserves the right to refuse a gift. Because PPGNW is a tax exempt organization, gifts to PPGNW are deductible by donors for personal or corporate tax purposes to the fullest extent of the law.

PPGNW does not provide legal or other professional advice about the tax benefits of donors' contributions to PPGNW. PPGNW does not provide an appraisal or valuation of in-kind gifts.

Every member of the Board of Directors makes an annual monetary contribution to PPGNW and participates in fundraising for PPGNW each year.

PPGNW will diligently seek financial support from private foundations.

#### **EXPLANATION**

### General

Donations from individuals and foundations are a necessary component of PPGNW's revenue.

PPGNW offers donors a variety of giving opportunities, including individual donations, establishment of endowments and planned giving. Fundraising activities include workplace campaigns, direct mail, telephone solicitations, annual campaigns, major gifts, capital campaigns, and special events. (The Planned Giving Policy describes policies unique to that gifting option.)

Planned Parenthood Federation of America (PPFA) requires that affiliates have a fundraising policy.

# Responsibility to Donors

PPGNW will not knowingly act in any way in which would jeopardize the donor's interest.

PPGNW will not use undue pressure or manipulation when dealing with prospective donors. The task of all fundraising personnel shall be to inform, serve, guide, and otherwise assist the donor in fulfilling his/her philanthropic wishes.

All fundraising personnel employed by PPGNW shall be paid a salary or fixed wage but shall not receive commissions which could give such personnel a direct beneficial interest in any donation.

All information concerning donors or prospective donors of planned gifts shall be kept strictly confidential by PPGNW and its authorized personnel unless permission is obtained from the donors to release such information.

# No Advice Given

PPGNW facilitates the giving process by providing general information about charitable contributions through printed materials and gifting seminars. Donors shall be encouraged to seek independent counsel or other professional advice as to the tax consequences or other issues relating to gifts, especially those of tangible personal property. PPGNW will not provide appraisals of the value of any gift.

# Acceptance or Decline of Gifts

While gifts of real estate and personal property are often accepted, PPGNW may decline to accept any gifts that would generate more cost than benefit to the organization, gifts that do not comply with applicable IRS regulations, , or gifts that are not desired for any other reason.

Gifts of real estate or personal property shall undergo an appraisal and title search, and may be evaluated for environmental concerns to ensure they are free from hazardous waste. A Phase I environmental survey will be required on all real properties to be received. Acceptance of property is contingent upon receiving an unqualified survey. Before PPGNW accepts a gift of real property, two PPGNW officers shall approve the transaction.

When donors seek to make a gift to a particular program, health center or geographical location, PPGNW will encourage the donor to remove such restrictions in order to advance our overall mission.

# **Testamentary Bequests**

The donor's wishes regarding the restricted use of a bequest will be honored, subject to the requirements of local law. Unrestricted bequests shall be placed in the board designated Lee Minto Endowment Fund.

#### RESPONSIBILITIES AND MONITORING

- 1. The Vice President for External Affairs prepares an annual fundraising plan proposal and includes this in the annual budget proposal.
- 2. The Vice President for External Affairs reports the results of fundraising each month to both the Finance Committee and the Board of Directors.
- 3. The Finance Committee reviews the fundraising results each month.
- 4. Management presents changes in fundraising strategies to the Finance Committee.
- 5. PPGNW will not initiate a capital fundraising campaign without the approval of the Board.