

**Joseph T. Simpson Public Library**  
**Fundraising Policy**  
**Adopted September 8, 2015**

The Joseph T. Simpson Public Library performs fundraising activities to obtain funds to support their programs and administration of those programs.

The Joseph T. Simpson Public Library honors the intentions of donors by spending restricted funds for the expenses that meet the donor-imposed restrictions. The Executive Director forwards all restricted grant and contribution letters to the bookkeeper. The bookkeeper ensures that restricted revenue and expense transactions are segregated by code in the financial accounting system. Reports are generated by the financial system and sent to the donor as required. As part of the annual audit, the independent auditors review all grant and contribution related correspondence and review the financial transactions to ensure that any restrictions imposed were met.

The following are policies for fundraising activities associated with the Joseph T. Simpson Public Library.

- Honesty is an essential element of all fundraising campaigns. Fundraisers should be open, honest, and clear in their use of solicitations, and should make every effort to avoid misleading donors as to the use of funds and description of activities.
- The Joseph T. Simpson Public Library will conduct all fundraising activities in a fashion consistent with our mission and vision statements, strategic plan, and bylaws.
- All venues used for advertising and solicitation shall be consistent with our mission and vision statements, strategic plan, and bylaws.
- Annually, the Development and Special Events Committee shall present a fundraising and event calendar to the Board of Trustees for approval.

All persons engaged in fundraising activities will maintain accurate records of expenses, donations, and income reporting that information to the chairperson of the Development and Special Events Committee.

- The Joseph T. Simpson Public Library will conduct fundraising activities in a cost effective manner maintaining our fiduciary responsibilities to our donors and patrons.

- All persons engaging in fundraising activities for the Joseph T. Simpson Public Library will abide by the Ethics and Accountability Code stated in Appendix A: The AFP Code of Ethical Principles and Standards for Professional Practice.
- Joseph T. Simpson Public Library staff and volunteers performing fundraising activities are to abide by the Association of Fundraising Professionals “Donor Bill of Rights” as stated in Appendix B – Donor’s Bill of Rights.

### **Appendix A: The AFP (Association of Fund Raising Professionals) Code of Ethical Principles and Standards for Professional Practice**

The **Standards for Excellence: An Ethics and Accountability Code for the Nonprofit Sector** state, “An organization’s fundraising program shall be maintained on a foundation of truthfulness and responsible stewardship. Its fundraising policies should be consistent with its mission, compatible with its organizational capacity and respectful of the interest of donors and prospective funders.” The **Standards** go on to state that nonprofits should have certain practices in place to assure responsible stewardship, including:

- Solicitation and promotional materials shall be accurate, truthful, and correctly identify the organization, its mission, and the intended use of the solicited funds
- All statements made by the nonprofit in its fundraising appeals about the use of a contribution should be honored
- Nonprofits should honor the known intentions of a donor regarding the use of the donated funds
- Nonprofits should respect the privacy of donors and safeguard the confidentiality of information, which a donor reasonably would expect to be private
- Nonprofits should provide donors an opportunity to state that they prefer to remain anonymous and that their name, the amount of their gift, or other information would not be publically released
- Nonprofits should provide donors an opportunity to have their names removed from any mailing lists, which are sold, rented, or exchanged
- Nonprofits should honor requests by a donor to curtail repeated mailings or telephone solicitations from in-house lists

- Solicitations should be free from undue influence or excessive pressure, and should be respectful of the needs and interests of the donor or potential donor

## **Appendix B: The Donor Bill of Rights**

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure the philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the nonprofit organizations and causes they are asked to support, we declare that all donors have these rights:

- I. To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes
- II. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship
- III. To have access to the organization's most recent financial statements
- IV. To be assured their gifts will be used for the purposes for which they were given
- V. To receive appropriate acknowledgement and recognition
- VI. To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law
- VII. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature
- VIII. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors
- IX. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share
- X. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers