



# Policy on Solicitation and Acceptance of Gifts

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## Rationale

UCAN actively solicits gifts to further the goals of the agency. This policy speaks to the solicitation and acceptance of all gifts, including those which must be evaluated prior to acceptance.

## Legal and Ethical Practices

The seeking of charitable and philanthropic funds from individuals, corporations, foundations and other entities shall be accomplished with ethical, fiscally responsible and recognized fund development best practices. The agency shall accept only those gifts of which the transference and implementation of are deemed consistent with public laws, regulations and/or public policy of the State of Illinois and the Federal Government. The agency reconciles its fundraising practices with the prevailing ethical practices of the Association of Fundraising Professionals (see Policy on Ethical Fundraising Practices).

## Acceptance and Use of Gifts

The agency shall accept gifts which are consistent with the mission, goals, purposes and services of the agency for the implementation and support of its accepted administrative practices and pursuit of its programs and services. When non-monetary gifts are offered, they will not be accepted until the agency has had the opportunity to assess the potential financial, legal and ethical implications of acceptance.

From time to time, certain gifts may be offered that, if accepted, could damage the ability of the agency to accomplish its goals. When potentially controversial gifts are being considered by the Agency, the President & CEO and/or Chief Development Officer shall bring the matter to the attention of the Board. All decisions to solicit and/or accept potentially controversial gifts shall be made by the Governing Board, preferably before soliciting such gifts. The primary consideration influencing their decision on accepting the gift will be the impact of the gift on the agency and not the source of the gift.

When evaluating the solicitation/acceptance of gifts that are potentially controversial, the Governing Board will consider the following factors:

- **Core Values** - Will accepting the gift compromise any core values of the agency?
- **Compatibility of Cause** – Is there a commonality of cause and intent between the donor and the agency? Will accepting the gift further the mission, goals and/or objective of both groups?
- **Public Relations/Reputation** – Will the public perception of the agency be damaged because of gift acceptance? Will the gift encourage or discourage others to give?
- **Motivation** – Is there clear charitable intent and a commitment to serve the community? It is understood that it is usually appropriate for donors to experience tax incentives, community acceptance and publicity values as an indirect result of making a gift.
- **Practicality** – Are there significant restrictions to the gift which render it not of practical use to the agency?
- **Consistency** – Will acceptance of the gift be inconsistent or incompatible with other fundraising activities and/or gifts?

- **Credibility** – Will the reputation of the donor have a negative effect upon the reputation of the agency?
- **Organizational Stability** – If controversy develops, will it be significant enough to undermine the stability of the agency?
- **Form of Gift** – Will a gift other than cash (i.e., in-kind contribution) create problems such as advertising or sponsorship? Are there financial implications of acceptance?
- **Source of Gift** – Whether from an individual, corporation or other entity, is it a legal source?

### **Valuation**

Individuals in the employ of the agency may verify in written form the value of all monetary gifts. Non-monetary gifts such as securities, real property and gifts-in-kind will be acknowledged by describing the quantity and type of items involved. This documentation is usable by donors for tax purpose but may not always include valuation information. Valuation of non-monetary gifts is the responsibility of the donor. Donors are responsible for consulting their own advisors about the tax implications of their gifts.

### **Acknowledgement**

Upon receipt of a gift or any gift-related documents, the agency will promptly provide the donor with a written acknowledgement in conformance with all applicable laws and regulations. If a contribution is cash or property, the donor will be given or mailed a written receipt. Receipts will not be issued for contributions of services or of the use of property.

### **Donor Rights**

UCAN adheres to the Association of Fundraising Professionals' (AFP) Donor Bill of Rights, which states that all donors have the following rights:

1. 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.
2. 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 responsibilities.
3. To have access to the organization's most recent financial statements.
4. To be assured their gifts will be used for the purposes for which they were given.
5. To receive appropriate acknowledgement and recognition.
6. To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.
7. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
8. To be informed whether those seeking donations are volunteers, employees of the organization, or hired solicitors.
9. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
10. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

**Fundraising Costs**

The agency will comprehensively analyze the cost and benefits of each of its fundraising activities, taking into account factors which affect the reasonableness of fundraising costs in comparison to dollars raised. Fundraising costs are carefully allocated and are not diverted to program or educational purposes, thus providing information enabling the Governing Board and the Resource Development Committee to make rational fund development decisions.