



# Fundraising Policy

## Introduction

The Alliance for a Healthier Generation, Inc. (Healthier Generation) will raise funds that are consistent with the organization's mission and that support core programs and special projects.

Healthier Generation will NOT solicit gifts nor create revenue generating business entities that (a) would result in violation of the organization's governance and bylaws, (b) would result in loss of federally designated 501(c)(3) nonprofit organization status, (c) are too difficult or too expensive to pursue in relation to their value, (d) would result in any unacceptable consequences for Healthier Generation, or (e) are for purposes outside the organization's mission.

Funds will be solicited in a respectful, transparent, and inclusive manner. The Board of Directors and organization staff will be knowledgeable about the fundraising process and associated designated roles. Healthier Generation has designated the Corporate Relations Review Committee of the Board of Directors in partnership with the Chief Development Officer to develop, evaluate, and review fundraising policies, practices, and goals. Decisions on the termination or change to an identified fundraising activity/approach in this policy will be brought to the attention of the Board of Directors' Executive Committee, in consultation with the Chief Executive Officer.

All Board members and staff will support and participate in the total fundraising process including leveraging funding opportunities with individuals, corporations, foundations, and government sources. The Board and the staff will ensure that administrative functions such as communications, technology, and finance assist in the fundraising needs and efforts for the health of the organization. Healthier Generation will be accountable to donors and other key constituencies and will administer their stewardship and recognize them through an annual impact report and through development programming.

## Types of Fundraising Methods

- Annual giving – direct mail, email and digital, face to face, general gifts
- Grants (foundation and corporate)
- Major and principal gifts
- Sponsorships
- Events
- Planned giving
- In-kind donations

## Cost of Fundraising and Return on Investment (ROI)

Fundraising costs (including personnel related and direct prospect and donor engagement expenses) will be monitored to ensure that no more than 15% is spent on these activities. Additionally, specific event expenses or special fundraising activities with associated costs higher than 30% will be reviewed by the Corporate Relations Review Committee to determine continued support and participation.

## Donation Tax Implications

Donor-designated restrictions on contributions will be honored. Healthier Generation is a 501(c)(3) nonprofit, approved by the Internal Revenue Service as a tax-exempt charitable organization. Contributions made to the organization are tax deductible to the fullest extent of the law. Written tax receipts (electronic and/or printed, with gifts of \$250 and above requiring a mailed hard copy receipt to the donor unless donor/funder states an electronic receipt is acceptable) will be issued for all contributions made to Healthier Generation. If the donor receives anything in exchange for their donation, the donor will be informed of the fair market value and notified of the portion of the donation that is tax deductible.

Approved Nov. 10, 2020

## Fundraising Policy

### Donor Privacy, Data, and Database

Healthier Generation will collect the name, address, and other contact methods for donor receipting, recognition, and stewardship, including for future solicitations, appeals, and invitations. In no case will social security numbers be obtained from donors.

Healthier Generation will use a secure credit card merchant account service through a software service to process online contributions and event tickets.

Healthier Generation will support the [Donor Bill of Rights](#) and the [eDonor Bill of Rights, created by the Association of Fundraising Professionals \(AFP\), in conjunction with other fundraising and nonprofit groups.](#)

Donor information (name, address, contact information, and any other pertinent donor-related information tied to managing donor relationships and the donor's gift) will be collected and entered into Healthier Generation's secure donor database. For all gifts received, Healthier Generation will record the date, amount, and designation to ensure donor record of gift history and follow/adhere to donor intent.

Donor data may be used for these purposes:

- Distributing receipts and thanking donors for donations
- Informing donors about programs and upcoming fundraising activities of Healthier Generation
- Funding research and analysis
- Record keeping
- Reporting to applicable government agencies as required by law
- Other purposes related to the fundraising operations

Healthier Generation will actively solicit preferences of donors as to whether they wish to receive newsletters, event information, and general organization communications. Those communication and contact preferences will be recorded in the donor's database record.

Unless otherwise stated, Healthier Generation will not publish, sell, trade, rent, nor exchange donor data.

### Gift Processing/Donor Acknowledgments

Upon receipt, all contributions will be processed, coded, and recorded in the donor database. Healthier Generation will honor donor intent and all requests for donors to remain anonymous shall be honored by noting the gift in the donor database as appropriate.

Donor gift processing and records will adhere to best practices. All donations will be recognized within 5 days of receipt of the donation. IRS requires gifts and grants of \$250 or more to receive a written receipt and acknowledgment.

---

### Alliance for a Healthier Generation, Inc. – Tax Exempt Charitable Organization

The Alliance for a Healthier Generation, Inc. is a federally recognized tax-exempt charitable organization with offices in Portland, OR and is a qualified 501(c)(3) nonprofit organization with Federal Tax ID # 27-2028308, for which the donors will be entitled to charitable contribution tax deductions under the U.S. Internal Revenue Code section 170(c)(2).