

Ice Age Park and Trail Foundation, Inc.

Policy: Fundraising

Approved: Board of Directors

Effective Date: July 27, 2007

Table of Contents

1.0 Background and Purpose

2.0 Authority for this Policy

3.0 Fundraising Standards and Practices

4.0 Donor Recognition

5.0 Gifts from Individuals

6.0 Gifts from Foundations

7.0 Contributions from Corporations

8.0 Planned Gifts

9.0 Chapter Fundraising

1.0 Background and Purpose

Fundraising is a critical, ongoing activity of the Ice Age Park and Trail Foundation (“IAPTF”). The organization is committed to conducting its fundraising in an ethical and responsible manner in order to be in compliance with state and federal laws and to maintain the credibility of the organization. We are also committed to presenting a consistent image of the organization and its mission to the public, conducting our fundraising activities to the highest professional standard and soliciting funds only for needs consistent with the organization’s strategic plan.

2.0 Authority for this Policy

Authority for this policy is provided by the IAPTF bylaws, the Land Trust Alliance *Standards and Practices*, and state and federal charitable solicitation and corporate law.

3.0 Fundraising Standards and Practices

The IAPTF will endeavor to follow the procedures set forth in the Land Trust Alliance *Standards and Practices*, the *Donor Bill of Rights* (Exhibit A) and the *Association of Fundraising Professionals Code of Ethical Principles and Standards of Professional* (Exhibit B) with respect to its fundraising activities. In addition, the following will apply:

3.1 Legal and Ethical Practices

The IAPTF will stay informed of and will comply with all state and federal charitable solicitation laws. The organization will not engage in commission-based fundraising.

3.2 Gift Acceptance Policy

The IAPTF reserves the option to decline any gift that is inconsistent with the organization’s mission, strategic plan or code of ethics.

3.3 Accountability to Donors

The IAPTF is accountable to its donors and provides written acknowledgement of gifts as required by law, ensures that donor funds are used as specified, keeps accurate records, honors donor privacy concerns and advises donors to seek independent legal and financial advice for substantial gifts.

3.4 Accurate Representations

All representations made in promotional, fundraising, and other public information materials shall be accurate and not misleading with respect to the organization's accomplishments, activities and intended use of funds.

3.5 Use of Funds as Specified

All funds will be spent for the purpose(s) identified in the solicitation or as directed in writing by the donor and in accordance with the mission of the IAPTF.

3.6 Reasonable Fundraising Costs

Overall costs of fundraising will be reasonable as a percentage of funds raised. This percentage will be calculated in conjunction with the IAPTF annual audit.

3.7 Documenting the Need for Funds

To be consistent with the letter and spirit of the *Donor Bill of Rights*, the IAPTF will have a demonstrated **need** for any fund raising activity. This need should be well documented and must clearly state to potential donors why a contribution is necessary and how their donations will be spent.

4.0 Donor Recognition

All gifts will receive official acknowledgment by the IAPTF main office and will follow IRS regulations. Board members and chapter volunteers will be encouraged to send a supplemental thank you note. All philanthropic gifts, whether gifts of cash or gifts in kind, are recognized by text and not with logo identification. Donors who give \$100 or over will be listed in *Mammoth Tales* during the quarter in which their contribution was received and will be also be listed in the *IAPTF Annual Report*. Donors who wish to remain anonymous will not be mentioned in any public documents.

5.0 Gifts from Individuals

The majority of all gifts made to charities in the United States comes from individuals. Accordingly, the IAPTF recognizes that its members play a significant role in the overall revenue stream of the organization.

5.1 Memberships

IAPTF is a membership organization and derives a substantial portion of its operating budget through membership gifts. Membership categories shall be set forth in a schedule to be reviewed by the IAPTF Development Committee from time to time and approved by the IAPTF Board of Directors.

5.1.1 Membership Benefits

Members of all categories will receive at a minimum the following benefits:

1. A year's subscription to the quarterly publication *Mammoth Tales*, with news on trail development and volunteer activities, and features on Wisconsin's landscape;
2. Invitations to the IAPTF annual membership meeting, field trips and other special events;

3. An opportunity to participate in a local chapter and to participate in chapter hikes and trail work parties;
4. Discounts on IAPTF merchandise; and
5. Voting privileges at the annual membership meeting of the IAPTF.

5.1.2 Membership List

The membership list of the IAPTF is to be used only for official business. The list is not to be sold, rented, given or traded for use by anyone or any organization other than the IAPTF.

5.1.3 Membership Solicitation Policy

The membership generally will be solicited not more than three times per year. One solicitation is for membership renewal and subsequent reminders as necessary. One other is the annual appeal. From time to time a special appeal may be made in connection with a fundraising campaign.

5.1.4 Duration of Membership

Memberships shall extend for 12 months from the first day of the month of the renewal anniversary. Changes to the renewal anniversary date may be made on an individual basis. The failure of a member to pay dues within 13 months of the initial renewal notice shall result in the termination of membership benefits.

5.1.5 General Contributions

Any monetary gift received from a member over and above membership dues will be considered to be a general contribution.

5.1.6 Gift Memberships

IAPTF will encourage members to give gift memberships in order to increase the number of members. Individuals who receive a gift membership are entitled to all the benefits of regular membership. Renewal notices will be sent to the gift member.

5.1.7 Employer Match

IAPTF encourages members to participate in their employer's match program. The employer match paperwork will be processed from the IAPTF main office.

5.1.8 Memorial and "In Honor Of" Gifts

Donors will be recognized in *Mammoth Tales* for the quarter in which the donation is received. The donation will be listed under the "Milestones" section with the name of the individual for whom the gift was given. A letter will be mailed to the family of the individual with the names of the donors in the case of memorial gifts or to the individual being honored in the case of "in honor of" gifts. A copy of the letter mailed to the family or individual is mailed to the donor along with a gift acknowledgement letter.

6.0 Gifts from Foundations

Applications for foundation grants will follow the Grantsmanship Center's Model unless the donor requests a different format.

6.1 Grant Application Process

1. Potential foundation prospects will be cross-referenced against the organizational database to check for duplication.
2. The prospect list along with each foundation's list of trustees and directors will be brought to the Development Committee for discussion and consideration.
3. All requests will be reviewed and approved by the Executive Director.
4. Grant requests developed to support a particular program (e.g., Mobile Skills Crew) will also be reviewed by the staff person who is assigned to manage that program.
5. Stewardship of grants is coordinated through the Executive Director or such other person designated by the IAPTF Board of Directors.
6. The Executive Director will update the Board of Directors annually regarding the status of foundation grants.

7.0 Contributions from Corporations

Contributions from corporations generally fall into two types. A corporate sponsorship is generally paid for through a corporation's marketing budget, not the philanthropic budget, and for this the corporation expects marketing exposure from IAPTF. Corporations may also purchase a membership in order to make a philanthropic gift or to provide membership benefits for its employees. Both kinds of gifts are valuable to IAPTF.

7.1 Corporate Sponsorships

The corporate sponsorship program provides *recognition* for business that sponsors the activities of the IAPTF. It is the responsibility of the Development Committee to secure and manage this aspect of fundraising for the IAPTF.

7.1.1 Number of Sponsors

The number of sponsors for the IAPTF will be identified as part of the IAPTF sponsorship program and will, from time to time, be reviewed by the Development Committee.

7.1.2 Sponsorship Selection

Identification of potential sponsors is the responsibility of the Development Committee, Chapters and the IAPTF staff. The Executive Director shall be responsible for maintaining the corporate sponsorship program to ensure that new sponsors are appropriate and do not cause conflicts with existing sponsors.

7.1.3 Sponsorship Benefits and Recognition

Sponsors will receive benefits and recognition as determined from time to time by the Development Committee. Additional benefits may be negotiated in exchange for increased sponsor fees or services. Only the logos of official sponsors will be used. Any use of these logos will be in accordance with the Logo Use Policy.

7.1.4 Sponsorship Duration

Official sponsor status is for a minimum of one year with multiple year commitments desirable. Sponsors are given priority to negotiate renewal of their sponsorship.

7.1.5 Valuation Process

The IAPTF will rely on professional consulting as needed to maintain the integrity of the program.

7.1.6 Additional Benefits

Sponsors may request corporate membership benefits as part of their sponsorship package.

7.2 Corporate Memberships

The corporate membership program will provide *benefits for employees* of the business that joins the IAPTF. Corporate membership levels and benefits will be determined from time to time by the Development Committee.

8.0 Planned Gifts

Planned charitable gifts by individual donors are extremely important to ensuring that the work of IAPTF continues into the future. Recognizing this, the IAPTF has created an endowment fund with the goal of providing a legacy giving option for members and friends

8.1 Planned Giving Information

The IAPTF will provide interested donors with general information on its planned giving program and will periodically promote the program through *Mammoth Tales* and its website.

8.2 Unrestricted Bequests

Unrestricted estate gifts will be placed in the endowment fund unless otherwise specified by the IAPTF Board of Directors.

8.3 Recognition

Donors will be encouraged to inform the IAPTF if they have included the organization in their estate plan. Recognition of these donors will be made in the *Annual Report*.

9.0 Chapter Fundraising

Given their diverse nature and differing needs, some chapters are required to generate operating funds to support their activities. Fundraising by chapters is an effective way to raise community awareness, increase members and volunteers, and secure grants from sources that may only contribute in a limited geographic area. It is critical that proper procedures for dealing with all fundraising, particularly grant requests, be adhered to in order to maintain IAPTF's overall credibility within the funding community.

9.1 Process for Grant Submission

1. Chapters that wish to submit grant requests to support their activities must clear their prospects with the Executive Director before proceeding with the grant process in order to avoid duplicate submissions.
2. Grant requests shall follow the Grantsmanship Center model (unless a different form is requested by the donor).
3. All grant requests shall be reviewed and approved by the Executive Director. Because of the contractual nature of grants, ALL grant requests must be signed by either the Executive Director or by a Board member who is authorized to enter into a contract for the foundation.
4. Proposals that are awarded grants will be processed using accepted methods of donor recognition, stewardship, implementation of proposal goals and objectives, and evaluation and submission of final reports consistent with the terms of the grant.

9.2 Local Sponsors

Requests for local sponsorships must be pre-approved by the Executive Director to ensure that the sponsorship is appropriate and does not create any conflicts under the corporate sponsorship program.

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