

# YWCA IS ON A MISSION

## **DONOR PRIVACY POLICY**

YWCA Northeast Indiana is committed to respecting the privacy of donors. The types of donor information that it collects and maintains are as follows:

- contact information (name, address, telephone number, email address, employer/company)
- giving information
- information on events attended, publications received, and special requests for program information
- information provided by the donor in the form of comments and suggestions

YWCA Northeast Indiana uses donors' information to understand their interests in its mission and to update them on the organization's plans and activities. It is shared with staff, board members, volunteers, and consultants only on a "need-to-know" basis. The organization also assures donors that their names and addresses will not be shared with any third party unless permission has been granted.

YWCA Northeast Indiana does not sell or share donor lists. Donors are entitled to request a copy of the information YWCA has on record about their giving.

If you have comments or questions about YWCA Northeast Indiana's donor privacy policy, please email Kristina Johnson Nussbaum at [knussbaum@ywcaerew.org](mailto:knussbaum@ywcaerew.org) or call 260-424-4908 x227.

## **DONOR SOLICITATION AND GIFT ACCEPTANCE POLICY**

1. YWCA Northeast Indiana solicits and accepts gifts that are consistent with its mission.
2. Donations will generally be accepted from individuals, partnerships, corporations, foundations, government agencies, or other entities, without limitations.
3. In the course of its regular fundraising activities, YWCA Northeast Indiana will accept donations of money, real property, personal property, stock, and in-kind services.
4. Certain types of gifts must be reviewed prior to acceptance due to the special liabilities they may pose for YWCA Northeast Indiana. Examples of gifts which will be subject to review include gifts of real property, gifts of personal property, and gifts of securities.

## **DONOR BILL OF RIGHTS**

We declare that all donors have the right to:

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- be informed of YWCA Northeast Indiana’s mission, of the way in which the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes;
- be informed of the identity of those serving on the Board of Directors, and to expect the board to exercise prudent judgment in its stewardship responsibilities;
- have access to YWCA’s most recent audited financial statements;
- be assured that YWCA will use their gifts for the purposes for which they were given;
- receive appropriate acknowledgment and recognition or choose to remain anonymous;
- be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law;
- expect that all relationships with individuals representing YWCA Northeast Indiana will be professional in nature;
- be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors;
- have the opportunity for their names to be deleted from mailing lists;
- feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

Donors and prospective donors are entitled to the following upon request or by visiting YWCA Northeast Indiana’s website:

- Most recent annual report;
- Most recent audited financial statements;
- Charitable registration number;
- Donor privacy policy;
- Gift policy and other related donor policies;
- Donor bill of rights

## FUNDRAISING POLICY OVERSIGHT

The Board shall review all fundraising policies, annually or as required.

**FUNDRAISING PROCEDURES.** The Chief Revenue Officer will develop an annual fundraising plan to be approved by the Board. All fundraising activities for YWCA are to be supervised by the Chief Revenue Officer and Chief Executive Officer, including those conducted by board members, staff, volunteers and third-party consultants. The Board of Directors, the Marketing & Development Committee, volunteers, and others as appropriate, will be provided a copy of

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all policies and procedures related to fundraising activities to ensure compliance across the agency.

## 1. Procedure for Accepting/Processing Gifts

- a. Outright Gifts - Donations are accepted in the following manner:
  - i. Cash: Gifts of cash may be received at YWCA's fundraising events or community events or dropped off as donations at YWCA's main office.
  - ii. Checks: Contributions by check should be made payable as follows:  
YWCA Northeast Indiana, Attn: Finance, 5920 Decatur Road, Fort Wayne, IN 46816
  - iii. Credit Cards: YWCA accepts Visa, MasterCard, Discover and American Express credit cards as payment for a contribution and can process credit card payments online or have payments entered into online donation forms.
  - iv. Online Donations: Credit card contributions can be made through YWCA's online donation page or other online fundraising forms found on YWCA's website. Tax receipts are automatically issued by online form donations and should be saved by the donor in their records.
  - v. In-Kind Donations: In-kind donations are accepted following the stipulations laid out on YWCA's website or in collaboration with a YWCA staff member. Tax receipts for in-kind donations are available upon request.
- b. Deferred Gifts: All deferred giving agreements must be reviewed and approved by YWCA's legal counsel. Where substantially the same agreement is used repeatedly, only the prototype requires approval.
- c. Designated Gifts: Designated gifts will be used in accordance with the donor's preferences to the best of YWCA's ability

2. **Procedure for Soliciting Gifts.** All fundraising solicitations by or on behalf of YWCA will be truthful and will disclose the organization's name as well as the purpose for which funds are requested. Printed solicitations will include the YWCA address and other contact information. YWCA will provide appropriate training and supervision of the people soliciting funds on its behalf whether staff or volunteers, including training to avoid the use of techniques that are coercive or intimidating. All grant applications and letters of solicitation sent by YWCA must be sent on organization's letterhead, be

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reviewed by the Chief Revenue Officer or Grants Manager, and be signed by the Chief Revenue Officer or his/her designee. For solicitations via email, emails will be sent from a YWCA employee's YWCA email account with an email signature that contains YWCA's logo, mission, and the staff member's contact information. The Chief Revenue Officer will authorize the staff members responsible for sending email solicitations.

3. **Procedure for Entering and Recording Gifts.** The Accounting Specialist will deposit checks and cash donations and upload documentation to a secure shared drive. The Accounting Specialist will also upload documentation regarding ACH transactions. The Grants Manager will record information regarding donations in the agency's database including:
  - a. the donor contact information if the information on the check and/or response form is different or new;
  - b. purpose (designated or unrestricted);
  - c. the constituency source from which the gift was received (i.e. individual, corporation, foundation, organization, etc.);
  - d. type of gift (cash, check, credit card, online payment or in-kind donation);
  - e. amount of donation or fair market value for in-kind gifts;
  - f. source of the gift (i.e. direct-mail appeal, special event, etc.);
  - g. if a tax receipt was issued and the type (email, letter, etc.)
  - h. Every new donor will be added to YWCA's Constant Contact email list.
4. **Procedure for Acknowledging Gifts.** All gifts will receive a tax receipt generated by the online donation form or sent via email if the gift was cash or check or ACH. Donations of \$250 or more will receive a printed income tax receipt on agency letterhead signed by the Chief Revenue Officer. YWCA's Board Chair will handwrite a thank you card that will be mailed to the donor in addition to their receipt letter for donations of \$500 made by individuals.
5. **Public Recognition.** Before publicly recognizing donors, YWCA must obtain explicit permission and know exactly how the donor wishes to be listed – individually or as a couple, with professional credentials, or anonymously. Recognition preferences must be recorded in the database and/or on YWCA's Event Planning documents.
  - a. Government, private, and foundation funder recognition: Prominent placement of logos on YWCA's website, inclusion in YWCA's annual report funder

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acknowledgement list, and funder acknowledgement on printed materials such as brochures.

- b. Corporate sponsorships: Prominent placement of logos or company name (depending on sponsorship level) on YWCA's website and other event promo materials, as determined by the sponsorship level.
6. **Procedure for Internal Reporting.** The Grants Manager will prepare a monthly report of gifts to be saved to an accessible shared drive for the Chief Revenue Officer and prepare tax receipt letters and collaborate with the Board Chair on sending thank you notes. The Finance Team supervised by the Chief Financial Officer will reconcile donations recorded in the database with donations deposited in the bank, each month. The Chief Financial Officer will be responsible for preparing monthly financials approved by the Board finance committee and reviewed at Board meetings.
7. **Procedure for Maintaining Donor Privacy/Database Confidentiality.** Staff, board members, and volunteers involved in fundraising are privy to personal information. It is vital that they keep this information confidential. All who have access to the donor database must read and sign a confidentiality agreement. All printed files of donor data (donations slips, copies of checks, credit card information) must be securely stored. Digital files of donor data must be kept private and secure on YWCA's secure network drive and Google Drive. Older files must be kept secure in locked filing cabinets in YWCA's storage space until they are disposed of securely by a third-party vendor.