



## WORKSHOPS FOR WARRIORS (WFW) DONOR POLICY

### FUNDRAISING POLICY

Workshops for Warriors seeks outright gifts and future gift commitments that are consistent with its mission. Donations generally will be accepted from individuals, partnerships, corporations, organizations, government agencies or other entities without limitations—unless acceptance of gifts from a specific source is inconsistent with the organization’s beliefs, values and mission. WFW will not accept gifts from companies whose products may be harmful to our students or from donors whose requests for public recognition are incompatible with our philosophy of appreciation.

Donors are encouraged to support areas reflecting their interests. WFW priorities include gifts for unrestricted, restricted, endowment, and in-kind purposes.

- When gifts with restrictions are accepted, restrictions will be honored. These restrictions should be detailed in the donor’s gift or pledge commitment letter.
- In-kind donors must complete a gift-in-kind form that includes the name of the donor, a description of the item(s), the market value of the item(s) and permission to publicly recognize the donation. (See Appendix A for gift-in-kind form.) Once accepted, the donated item(s) become the property of the WFW, which retains the right to dispose of a gift-in-kind as it sees fit, unless another arrangement has been made with the donor.
- Gifts of real estate should be reviewed by the President before acceptance. The donor should be responsible for obtaining and paying for an appraisal of the fair market value and an environmental audit of the property. Property that carries a mortgage should not be accepted.
- Multiyear pledges for major gifts are encouraged, but for no more than three to five years. Donors should complete and sign a gift or pledge agreement form detailing the purpose of the gift, payment schedule and how they wish their names to appear in donor-recognition materials. (See Appendix B for pledge commitment form.)

*All third parties not employed by WFW who wish to solicit funds on behalf of the organization must acquire written permission from the WFW President or VP of Finance & Administration prior to beginning any fundraising activities.*

### FUNDRAISING PROCEDURES

Upon receipt, all monetary donations shall be forwarded to the accounting department for coding and recording purposes. After funds have been accounted for by the appropriate accounting staff, a written transmittal, check copies, cash receipts, and any other correspondence accompanying the gift shall be circulated through the development department.



Workshops for Warriors is a nonprofit 501(c)(3) and contributions made to the organization are tax deductible to the fullest extent of the law. Written tax receipts shall be issued for all donations. If the donor receives anything in exchange for their donation, the tax receipt shall clearly state what portion of the donation is tax deductible. At the beginning of each calendar year, WFW shall provide its donors with written documentation of all tax deductible gifts received during the prior calendar year.

All monetary donations are recorded and deposited according to the accounting procedures. All donor-designated restrictions shall be communicated to the accounting department so that they may be recorded and governed appropriately. All requests for donors to remain anonymous shall be honored by flagging the gift in the donor database as appropriate. All in-kind gifts shall be recorded and acknowledge according to development and accounting procedures.

## **DONOR RECOGNITION POLICY**

Workshops for Warriors depends on the support of its donors. When acknowledging receipt of a gift, careful consideration will be given to the request for anonymity. If the donation is given in this regard, our Bookkeeper will provide a receipt for the gift and no further recognition will be given. However, if the gift is not given with anonymity, the following four ways of acknowledgement exist:

- **Thank You Cards**

The Development Associate, excluding where anonymity is requested, will acknowledge donations accepted by Workshops for Warriors in writing. The Development Associate's acknowledgement will identify the type of the donation; or in the case of in-kind goods or services, a description; and thank the donor for their support.

For memorials or tributes, a signed card will be sent to whomever the donor requests within five business days after receipt. The Donor will be notified that the memorial or tribute has been received and that the honoree has been notified of same (no amount on honoree's note).

- **Public Thank You Messages**

In addition to thank you letters, Workshops for Warriors may choose to recognize a donor through social media posts, press releases, media photo opportunities, certificates, and invitations to special events with appropriate recognition at the event.

- **Acknowledgement in the Workshops for Warriors' Facility**

Workshops for Warriors is committed to publically thanking donors in its facility. Examples include donor recognition plaques in student classrooms and donor recognition plaques on donated equipment. These forms of recognition serve as both a tangible and visible record of



philanthropic support for Workshops for Warriors as well as an expression of appreciation for such support.

A selection of named or commemorative gift opportunities may be made available to each donor. Such opportunities represent a tangible means of demonstrating an individual donor's investment in WFW.

- **Acknowledgement on the Workshops for Warriors' Facility**  
In addition to being recognized in ways aforementioned, it is possible that some donors will be recognized in other ways at the site of the capital project.
  - a. **Longer-term recognition:** Recognition of capital contributions for the construction of buildings may be provided by signage or other forms of recognition, when circumstances warrant, as determined by the Vice President of Finance and Administration. The duration and kind of on-site donor recognition will be considered on a case-by-case basis.
  - b. **Short-term recognition:** During project fundraising and/or construction, temporary signs may be used by Workshops for Warriors to recognize donors involved in specific capital improvement projects. The level of donation required for the temporary, on-site recognition will be determined on a case-by-case basis, depending on the total cost and duration of the project.
- **Permanent, public recognition may also be available for every donor with cumulative cash or in-kind gifts of \$10,000 or more, or who have signed a letter of intent to remember WFW in their estate planning, and who give permission for public recognition.**
  - a. Recognition of contributions to specific campaigns will be determined in the campaign plan. In general, permanent recognition will be placed at the site of any new construction or capital project, so long as such recognition is in compliance with policy.
  - b. If an individual wishes to open a named endowed fund to benefit WFW or one of its programs, a minimum initial investment of \$100,000 is required.
  - c. Design of any public recognition should be reviewed and approved by the senior management of WFW.



## DONOR PRIVACY POLICY

All information concerning donors or prospective donors, including their names, addresses and telephone numbers, the names of their beneficiaries, etc., shall be kept strictly confidential by WFW, its staff and volunteers, unless permission is obtained from donors to release such information (see Appendix C for permission form).

The types of donor information that it collects and maintains are as follows:

- Contact information: name, address, telephone number and email address
- 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

WFW 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.

WFW will not share, sell, rent or otherwise offer information about supporters to other organizations without permission. WFW will maintain complete and accurate supporter records for at least such time as require by law. WFW has procedures in place to limit access to information to only those employees and volunteers who need to know such information in order to fulfill our mission.

We will use our best efforts to comply with the expressed wishes of any supporter who does not want their name used in any promotional material, wishes their name removed from solicitation and other mailing lists, or wishes their gifts or services to remain anonymous.

We collect personal information from visitors to our website only if they make a donation or request goods or services. Personal information provided by users of our website is used to process a gift or deliver requested information.

Visitors to our website or facility who provide us with their name and email address may be added to our mailing list, from which they can be removed at any time by following the instructions that are found in our electronic communications or by contacting our administrative offices by telephone, email, or mail.



APPENDIX A

**Gift-In-Kind Donation Form**

Name
Organization (if applicable)
Billing Address
City/State/Zip
Cell Phone
Email
Description of Gift:
Market Value of Gift:
Source of Value Estimate:

\_\_\_\_\_  
Signed

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date



**PLEDGE FORM**

\_\_\_\_\_  
Name

\_\_\_\_\_  
Billing Address

\_\_\_\_\_  
City/State/Zip

\_\_\_\_\_  
Cell Phone

\_\_\_\_\_  
Email

**Pledge Commitment**

I (we) pledge a total of \$ \_\_\_\_\_

To be paid in installments of  Monthly  Quarterly  Semi-annually  Annually  Other \_\_\_\_\_

**Payment Information**

Check (payable to Workshops for Warriors)

Credit card  AmEx  MasterCard  Visa

\_\_\_\_\_  
Credit card number

\_\_\_\_\_  
Exp. Date:

\_\_\_\_\_  
Security code

\_\_\_\_\_  
Amount to charge \$

Please send donation receipt(s) via  Mail  Email

\_\_\_\_\_  
Signed

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date



APPENDIX C

**Donor Permission**

Workshops for Warriors is grateful for your gift and wants to ensure we are following your wishes when it comes to acknowledging your gift. Please indicate below how you are comfortable being recognized.

- I (we) wish to have our gift remain anonymous (including social media posts)
- I (we) give permission for Workshops for Warriors to post donor acknowledgments in social media sites including Facebook, Twitter, WFW website and IMPACT letters.

I \_\_\_\_\_, do hereby give Workshops for Warriors permission to use my

- Name
- Photo (if applicable)
- Logo (if applicable)
- Video clip (if applicable)

in all forms and media and in all matters, including composite or purpose, and

- I waive any right to inspect or approve the finished product, including written copy that may be created in connection therewith.
- request the right to inspect or approve the finished product, including written copy that may be created in connection therewith.

I \_\_\_\_\_, do hereby give Workshops for Warriors permission to publish the amount of the gift given.

Please use the following name(s) in all acknowledgements:

\_\_\_\_\_  
Signed

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date