



FUNDRAISING AND DONOR PRIVACY POLICY

Forge Evolution solicits and accepts gifts that are consistent with its mission and that support its core programs, as well as special projects. These include clients' payment for services, grants, and fundraising activities. The Board of Directors and Forge Evolution staff members must sign confidentiality agreements. Interns and volunteers do not have access to donor records.

In the course of its regular fundraising activities, Forge Evolution will accept donations of money, securities, real property, and personal property. Donations will be accepted from individuals, partnerships, corporations, foundations, government agencies, or other entities.

Certain types of gifts must be reviewed prior to them being accepted because they could create liabilities or impose special obligations on Forge Evolution. The types of gifts that will require review, and the review process, are as follows:

- Gifts of real property – land, buildings, and/or automobiles may only be accepted upon approval of the Board of Directors;
- Gifts of personal property – personal property such as furniture, business equipment may only be accepted upon approval of the Executive Director;
- Gifts of securities – stocks, bonds, or other securities may only be accepted upon approval of the Executive Director;
- Restricted gifts – gifts that may only be used for restricted purposes may only be accepted upon approval of the Executive Director;
- Unusual gifts – gifts that are out of the ordinary, such that they differ significantly from the amounts or types of gifts that are routinely received by the organization, may only be accepted upon approval of the Executive Director.

Forge Evolution may elect to refuse gifts of cash, securities, real estate or other items of value if there is reason to believe that such gifts are incompatible with the mission of the organization, conflict with its core values, or would create a financial, administrative, or programmatic burden. The Executive Director is directed to refer questionable gifts to the Board of Directors for guidance on a case-by-case basis. Employees of the organization are encouraged to bring to the attention of the Executive Director any concerns they may have about the appropriateness of accepting any gift.

Forge Evolution may elect to refuse gifts of any type if the potential gift poses a conflict of interest including, but not limited to, real conflicts of interest, appearances of conflicts of interest, or perceived conflicts of interest.

Forge Evolution follows the Donor Bill of Rights (developed by American Association of Fundraising Counsel, Association for Healthcare Philanthropy, Council for Advancement and Support of Education, and the Association of Fundraising Professionals), which is attached to this policy statement.

When funds are accepted with restrictions, restrictions will be honored.

No information is disclosed, except by approval of the Executive Director, regarding donation data or grant information. This prohibition is intended to include, but not be limited to, the privacy of donors' information that donors would reasonably expect to be kept private, grant information, and financial information. Requests by donors to remain anonymous, have their names removed from mailing lists, or to restrict appeals will be honored. Information about donors that should be private will not be made public. Donors will not be pressured when solicited for contributions.

Forge Evolution does not pay fundraisers based on a percentage of the amount raised or other commission formula. Forge Evolution does not normally hire outside fundraisers, and would only hire fundraisers and fundraising counsel who are properly registered with the applicable state authorities.

Forge Evolution's Board of Directors and/or Executive Director will approve all fundraising activities conducted by any staff, volunteers, consultants, contractors, board members, and others soliciting on behalf of the organization.

Policy approved by the Forge Evolution Board of Directors on May 1, 2021.

A Donor Bill of Rights

PHILANTHROPY is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the non-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

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

DEVELOPED BY:

Association of Fundraising Professionals (AFP)
Association for Healthcare Philanthropy (AHP)
Council for Advancement and Support of Education (CASE)
Giving Institute: Leading Consultants to Non-Profits

ORIGINALLY ENDORSED BY:

Independent Sector
National Catholic Development Conference (NCDC)
National Committee on Planned Giving (NCPG)
Council for Resource Development (CRD)
United Way of America