

Richmond Waldorf School Fundraising Policy

The Board of Trustees of Richmond Waldorf School recognizes that Richmond Waldorf School engages in fundraising and solicitation activity from time to time. In order for Richmond Waldorf School to comply with federal, state and local laws, the Board has established this fundraising policy.

- A. OVERSIGHT – All fundraising activity for Richmond Waldorf School is supervised, coordinated and directed by Richmond Waldorf School Development Director, or person charged in that capacity by the Board of Trustees (hereafter referred to as the Development Director). The Board of Trustees shall annually review all fundraising activity by Richmond Waldorf School.
- B. USE OF FUNDRAISING PROFESSIONALS - Third parties not directly affiliated with the organization must have written permission from Richmond Waldorf School Development Director prior to any solicitation on behalf of Richmond Waldorf School. Third party fundraisers engaged by Richmond Waldorf School must be registered with appropriate state and local authorities, and their representation of the organization must be evidenced by a written agreement approved by the Development Director.
- C. TRUTH AND ACCURACY
 - 1. All solicitation and fundraising materials and other communications to donors and the public shall clearly identify Richmond Waldorf School and be accurate and truthful.
 - 2. The Development Director shall review fundraising or solicitation materials prior to publication, and remove from such materials:
 - i. material omissions or exaggerations of fact, misleading, unauthorized, or unlicensed photographs, any other communication which would tend to create a false impression or misunderstanding; and
 - ii. any statements or content that would tend to create unrealistic donor expectations of what the donor's gift will actually accomplish.
- D. DONATION ACCOUNTING
 - 1. Upon receipt, all monetary donations shall be forwarded to the Development Director for coding and recording purposes.
 - 2. After funds have been accounted for, a written transmittal, check copies, cash receipts, and any other correspondence accompanying the gift shall be circulated through the Accounting department.
 - 3. All monetary donations are recorded and deposited according to accounting procedures.
 - 4. All donor-designated restrictions shall be communicated to the Accounting department so that they may be recorded and governed appropriately.
 - 5. All requests for donors to remain anonymous shall be honored by flagging the gift in Richmond Waldorf School's donor database, as appropriate.

Richmond Waldorf School Fundraising Policy

6. All in-kind gifts that are accepted by Richmond Waldorf School shall be recorded and acknowledged according to development and accounting procedures.
- E. **DONOR ACKNOWLEDGMENT** – Richmond Waldorf School will provide all donors with specific acknowledgments of charitable contributions in accordance with legal requirements for proper donor substantiation and organizational disclosure.
- F. **COMPENSATION** – Richmond Waldorf School shall pay fundraisers no more than reasonable compensation for their services. Richmond Waldorf School shall not compensate internal or external fundraisers based on a commission or a percentage of the amount raised.
- G. **DONOR PRIVACY POLICY** – Richmond Waldorf School respects the privacy of donors.
 1. Any information supplied to Richmond Waldorf School by donors will be used solely to fulfill and/or process their donation and shall not be shared for any reason unless written permission is granted by the donor to share such information.
 2. All requests to remain anonymous shall be honored.
 3. Donors who supply Richmond Waldorf School with their postal address or email address may be contacted periodically for solicitation purposes and/or with information regarding upcoming events.
 4. Donors may request to be permanently removed from Richmond Waldorf School's mailing list by contacting Richmond Waldorf School via email, telephone, or postal mail. All requests to be removed from Richmond Waldorf School's mailing list shall be honored.
 5. Richmond Waldorf School shall not sell or otherwise make available the names and contact information of its donors, except where disclosure is required by law.
 6. Richmond Waldorf School shall not send mailings on behalf of other organizations.
 7. Richmond Waldorf School shall provide a clear, prominent and easily accessible privacy policy on any of its websites that tells visitors:
 - i. What information, if any, is being collected about them and how this information will be used;
 - ii. How to access personal information collected and request correction;
 - iii. How to inform Richmond Waldorf School that the visitor does not wish his/her personal information to be shared outside the organization; and
 - iv. What security measures Richmond Waldorf School has in place to protect personal information.
- H. **COMPLIANCE WITH LAW** – In addition to any other requirements of this policy, all fundraising activities for Richmond Waldorf School shall be conducted in accordance with applicable law.