



LITERS Donation and Fundraising Policy

Last revised September 2016

DONATION ACCEPTANCE POLICY

20 Liters seeks outright donations and future donation commitments that are consistent with our mission. Donations generally will be accepted from individuals, partnerships, corporations, organizations, government agencies or other entities without limitations—unless acceptance of donations from a specific source is inconsistent with the organization’s beliefs, values and mission. 20 Liters will not accept donations from companies whose products may be harmful to our clients or from donors whose requests for public recognition are incompatible with our philosophy of appreciation.

In processing, all donations will be coded in the donor database for the constituency source from which the donations were given (e.g., individual, corporation, foundation, organization, etc.).

Multiyear pledges for major donations are encouraged, but for no more than three to five years. Donors should complete and sign the Donation / Pledge Agreement detailing the purpose of the donation, payment schedule and how they wish their names to appear in donor-recognition materials.

Donors are encouraged to support areas reflecting their interests. 20 Liter’s priorities include donations for unrestricted, restricted and endowment purposes.

A selection of named or commemorative donation opportunities may be made available to each donor. Such opportunities represent a tangible means of demonstrating an individual donor’s investment in 20 Liters.

When donations with restrictions are accepted, restrictions will be honored. These restrictions will be detailed in the donor’s donation or pledge commitment letter.

Donor information that should be private and confidential will not be made public.

DONATION IN KIND POLICY

The purpose of this policy is to ensure that 20 Liters accepts donations-in-kind that support our mission, are consistent with our policies and are properly accounted for and acknowledged. A donation-in-kind is an item such as equipment, software or a product that a donor voluntarily transfers to 20 Liters without charge or consideration. Only 20 Liter’s Managing Director and Board of Directors have the authority to accept donations-in-kind. Donors must complete a Donation-in-Kind form that includes the name of the donor, a description of the item(s), the retail value of the item(s) and permission to publicly recognize the donation. Once accepted, the donated item(s) become the property of 20 Liters, which retains the right to dispose of a donation-in-kind.

DONATION ACKNOWLEDGEMENT POLICY

ALL DONATIONS

1. All donations will be acknowledged in some fashion within three business days
2. All donations will be recorded in Kindful, the system of record
3. All acknowledgements and receipts will include the appropriate IRS language, a message about our tax status, and our Employer Identification Number.
 - a. For example, a donation where no goods or services were exchanged:

"No goods or services were received in exchange for this donation. The full amount of this contribution is tax-deductible as allowed by law. 20 Liters is a US-based 501(c)3 non-profit organization, EIN 27-3378656."

- b. For example, a donation where a good or service was exchanged:

"In exchange for your contribution of \$500, you received a book with an estimated fair market value of \$75, so \$425 may be treated as a charitable donation and deducted as allowed by law. 20 Liters is a US-based 501(c)3 non-profit organization, EIN 27-3378656."

GENERAL DONATIONS

1. Donations received electronically will be acknowledged by automatic email from Kindful, the system of record.
2. Donations of \$249 or less will be acknowledged with the appropriate thank you letter or preprinted card signed by the Managing Director.
3. Donations of more than \$250 will be acknowledged with the appropriate thank you letter signed by the Managing Director.
4. The Executive Committee Chair will send an additional thank-you letter to donors of donations of \$500 or more.
5. The Managing Director will call donors of \$500-\$1,000 or more to thank them personally.

RECURRING DONATIONS

TBD

RE-ENGAGED DONOR

TBD

IN HONOR OF / IN MEMORY OF DONATIONS

TBD

DONATION RECORDING POLICY

1. Send all checks to the development department for recording, then forward them to the finance department for accounting and depositing.
2. Update donor information in the database if the information on the check and/or response form is different. Note the date of change in the record.
3. Record donations according to the donor's intended use, i.e. unrestricted, restricted (specific program or project), endowment, etc.
4. Record in the system the source of the donation, i.e. direct-mail appeal, special event, personal solicitation, etc.
5. Prepare a regular report of donations to be circulated to appropriate staff for information and special acknowledgement attention.
6. Acknowledge all donations within three business days using appropriate thank you letters based on the donation level.

INFORMATION STORAGE, USAGE AND SHARING POLICY

1. 20 Liters will actively seek to protect and hold secure all donor information. We will not share this information with any other organization except at the specific request of the donor or as required by law.
2. Only 20 Liters staff (paid or volunteer) whose duties require it will have access to donor information. All staff (paid or volunteer) will sign a confidentiality agreement to this effect.
3. Affected parties will be notified within 24 business hours of discovery of a breach of privacy or confidentiality.
4. Donors have the right to their own data and 20 Liters will comply with requests to share their full information profile and record, once we have sufficient confirmation of identity.
5. Donors have the right to opt-out of communications and have their profiles and information archived. 20 Liters will comply with such requests in a timely fashion, once we have sufficient confirmation of identity.



Donation and Fundraising Declaration

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DECLARATION

All interested persons must complete this declaration before being provided access to donor information systems, including the system of record, physical files and historical correspondences.

I am a part of 20 Liters and require access to donor information as part of my assigned duties. This is to certify that I have received a copy of the Donation and Fundraising Policy of 20 Liters, have read and understood it, and agree to comply with its terms.

I agree to:

- Never share, sell, distribute or duplicate any donor information without expressed consent from a donor whose identity has been verified, or as required by law.
- Never intentionally destroy, errantly alter or falsify donor information
- Protect all donor information by safeguarding passwords, keys and other means of access to donor information
- Ensure that reports, files, receipts, communications, exports, and records are kept securely
- Never take donor or financial information off the premises or access any donor information system on an unsecured internet connection
- Immediately report any suspicions of inappropriate use of donor information to my direct supervisor or another higher-ranking supervisor

I understand that for these or other reasons, my access to donor information may be terminated at any time.

I understand that my actions and conduct define the trustworthiness of the organization.

Signature

Date

Printed Name



Donation / Pledge Agreement

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This agreement is required by 20 Liters for all multi-year donations over \$10,000 not provided by a foundation or grant-making organization.

PURPOSE OF THE DONATION

This donation is being provided to 20 Liters by

RECEPTION SCHEDULE

This donation will be received according to the following schedule:

RECOGNITION EXPECTATIONS

20 Liters wishes to acknowledge this donation in the following ways:

Signature of Donor

Date

Printed Name

Signature of 20 Liters Rep.

Date

Printed Name



Donation-in-Kind Agreement

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A donation-in-kind is an item such as equipment, software or a product that a donor voluntarily transfers to 20 Liters without charge or consideration. Once accepted, the donated item(s) become the property of 20 Liters, which retains the right to dispose of a donation-in-kind.

DESCRIPTION OF THE DONATION-IN-KIND

DONOR'S INFORMATION

RETAIL VALUE OF THE DONATION

EXPECTATIONS AND INTENT OF THE DONATION

RECOGNITION EXPECTATIONS

Signature of Donor

Date

Printed Name

Signature of 20 Liters Rep.

Date

Printed Name