



Core Connect, Inc.
Donor Solicitation Policy
www.coreconnectinc.org

Purpose

This policy aims to guide the ethical and transparent solicitation of donations to support Core Connect's mission. It ensures that all fundraising efforts align with best practices and maintain the organization's integrity and its relationships with donors.

Scope

This policy applies to all board members, staff, volunteers, and third-party representatives involved in soliciting funds on behalf of Core Connect.

1. Ethical Standards

- **Transparency:** Solicitations must be honest and clearly state the purpose for which funds are sought. Donors should have access to accurate information about Core Connect's mission, programs, and financial status upon request.
- **Confidentiality:** Donor information, including contact details and giving history, must be kept confidential and used solely for Core Connect's fundraising purposes unless the donor gives explicit permission for other use.
- **Donor Rights:** Core Connect adheres to the Association of Fundraising Professional's Donor Bill of Rights, which ensures donors are treated with respect, have access to information, and can opt out of future solicitations.
- **Avoiding Undue Influence:** No person may pressure, coerce, or intimidate prospective donors to contribute to Core Connect.

2. Solicitation Procedures

Approval of Campaigns: Before initiating solicitations, all fundraising campaigns must be approved by the Board of Directors (Capital Campaigns) Executive Director or designated staff member when authorized (Fundraising Lead).

- **Authorized Solicitors:** Only designated individuals (board members, staff, trained volunteers, or consultants) may solicit funds on behalf of Core Connect. Unauthorized personnel should not engage in fundraising activities.
- **Gift Acceptance Guidelines:** Solicitations should align with Core Connect's gift acceptance policy, which outlines acceptable forms of contributions (e.g., cash, in-kind gifts, stocks, real estate) and any restrictions.

- **Use of Funds:** Solicitations must specify whether the funds are intended for general operations, a specific program, or a capital campaign. All raised funds will be used according to the donor's intent unless that program or area has been fully funded. At this point, Core Connect reserves the right to designate funds to the most significant area of need.
- **Written Acknowledgment:** All gifts will receive a written acknowledgment within 10 business days of receipt. Acknowledgments should comply with IRS requirements for charitable contributions.

3. Restrictions on Solicitations

- **Conflict of Interest:** Individuals who solicit donations must disclose any potential conflicts of interest. No personal gain should result from solicitation activities.
- **Targeting Vulnerable Groups:** Avoid solicitation practices targeting groups or individuals who may be vulnerable due to age, income, or other factors. All solicitations should be appropriate, respectful, and conducted to uphold the dignity of all parties involved.
- **No Commission-Based Compensation:** Fundraisers will not receive compensation based on a percentage of funds raised. All compensation must be based on predetermined salaries or fees.

4. Donor Communications

- **Regular Updates:** Core Connect will provide donors with regular updates on the impact of their contributions. This may include annual reports, newsletters, or special event updates.
- **Respecting Donor Preferences:** If a donor requests to limit the frequency of solicitations or to be removed from solicitation lists, the organization will honor the request promptly.

5. Reporting and Compliance

- **Record Keeping:** Accurate records of solicitation activities and received donations will be maintained in accordance with accounting standards and regulatory requirements.
- **Compliance with Laws:** All fundraising activities will comply with local, state, and federal laws governing charitable solicitations, including registration requirements.

6. Policy Review

This policy will be reviewed annually by the Board of Directors or a designated committee to ensure that it remains current and in compliance with best practices and legal requirements.