

THE ROOSEVELT HIGH SCHOOL FOUNDATION FUNDRAISING POLICY

I. Purposes

The Roosevelt High School Foundation (hereinafter “TRHSF”) recognizes that TRHSF necessarily engages in fundraising activities. TRHSF adopted this Fundraising Policy to ensure its fundraising activities will always be conducted in full accordance with applicable laws at the local, state, and federal levels, and in keeping with the highest professional and ethical standards.

II. Development Committee

TRHSF will establish a Development Committee. Among the Development Committee’s primary responsibilities will include, but not be limited to:

1. Developing a realistic fundraising plan in concert with the Executive Committee.
2. Assisting fellow Board Members with completing Board-level fundraising tasks.
3. Organizing training, as needed, for the full Board to support the realization of fundraising goals.
4. Forging statewide relationships and fostering a positive image of TRHSF in all of Iowa.

Whenever possible, the Development Committee will seek review and approval of its decisions by the Executive Committee and, ultimately, the full Board.

III. Oversight

1. TRHSF fundraising activity is supervised, coordinated, and directed by the Executive Committee and the Development Committee.
2. On a quarterly basis, the Executive Committee and Development Committee shall provide a written report to the full Board on its adherence to this Policy and summarizing its fundraising activities.

IV. Use of Third Party Fundraising Professionals

1. TRHSF may hire third parties for fundraising activities, but only with express approval of the Board.
2. Third party fundraisers engaged by TRHSF must be registered, as appropriate, with local, state, and federal authorities, and provide written proof to TRHSF of same. Copies of such documentation shall be retained by TRHSF.

3. Third parties conducting fundraising activities for TRHSF must be hired and retained pursuant to a written agreement approved by the Board. TRHSF legal counsel should also approve the written agreement.

V. Compensation of Third Party Fundraising Professionals

1. TRHSF's Compensation Policy fully applies to third parties conducting fundraising activities for TRHSF.
2. TRHSF's Conflict of Interest Policy fully applies to third parties conducting fundraising activities for TRHSF.
3. TRHSF shall not compensate fundraisers based on a commission or a percentage of the amount of funds raised.

VI. Truth and Accuracy

1. **Clarity of Communications.** All solicitation and fundraising materials and other communications to donors, potential donors, and the public shall clearly identify TRHSF and be accurate and truthful.
2. **Review of Fundraising Materials.** The Executive Committee shall review and approve dissemination of fundraising materials prior to publication to ensure materials are completely devoid of any of the following:
 - a. Material omissions or exaggerations of fact, use of misleading photographs, or any other communication that would tend to create a false impression or misunderstanding; and/or
 - b. Any statements or content that would tend to create unrealistic donor or potential donor's expectations of what the donor's/potential donor's gift might or will accomplish.

VII. Donor Acknowledgment

TRHSF shall provide all donors with specific acknowledgments of charitable contributions in accordance with all federal, state, and local legal and tax requirements for proper donor substantiation.

VIII. Supervision and Training

1. TRHSF shall provide appropriate training and supervision of persons soliciting funds on its behalf, whether Board Members, employees, volunteers, or third party representatives, including training to avoid use of techniques that are coercive, intimidating, or intended to harass potential donors, or otherwise not in keeping with highest professional and ethical standards.

2. TRHSF shall not accept a gift from, or enter into a contract with, a potential donor that would knowingly place a hardship on the donor or place the donor's future well-being in any type of jeopardy.

IX. Amendments to this Policy

This Fundraising Policy may be amended, but only by a vote after due deliberation by the Board at a meeting held with proper notice, including notice this Policy is to be discussed.

Policy approved by The Roosevelt High School Foundation on:

_____.
[date]

Signature: _____

Name: _____

Title: _____