



# Advancement Office

## Policies and Procedures

As of March 8, 2020

1. **It is the policy of The Lord's Place to maintain an Income Process that includes daily donation entries into Raiser's Edge ("RE").**
  - a. **Donation checks and cash receipts**
    - Enter checks and cash into the "Daily Control Report"
      1. Separate checks into two categories "Gifts" and "Non-Gifts"
    - Enter gifts into RE and then run a Detailed Batch Report
    - Give Detailed Batch Report and Daily Control Report to Finance
    - Review all donor names and make any relevant notes on RE
      1. Add any phone numbers, emails or new addresses into RE
      2. Assign solicitor and create an action for follow up/specialized thank you
    - Any "In Memory" gift requires a hand written "In Memory" card (if address provided)
    - Any "In Honor" gift requires a hand written "In Honor" card (if address provided)
  - b. **Credit Cards**
    - Are run within 48 hours, and a Thank You letter is sent within 72 hours.
    - The Detailed Batch Report is sent to Finance.
    - Credit card numbers are securely destroyed after use.
  - c. **In Kind Donations –**
    - Donation forms are scanned and sent to Meredith or Kelcie for input
      1. Input details (Name, Address) and description: Clothes, Food, and Miscellaneous ("Misc.") into RE in a batch named "In Kind"
      2. Those forms with a "P" on them receive a personalized acknowledgement
2. **It is the policy of The Lord's Place to print, sign and send Thank You Letters every Friday morning, or within 48hrs if the donation exceeds \$5,000.**
  - a. **Checks, Cash and Credit Cards**
    - General Donations
      1. Standard Letter which will be revised quarterly
      2. In Raiser's Edge "Mail", "Donor Acknowledgement Letter", "General Thank You"
      3. Press "Send to Word Merge Wizard" at top. Do not acknowledge letters.

4. "Finish" and save in Department of Advancement Folder in Ack Letters under same format as previous day
  5. In Raiser's Edge "Mail", "Envelopes", "Include" and search for query created when printing letters. "Created On" and press today's date
  6. Press "Preview" and print
    - Appeals
      1. Every appeal will have its unique Thank You letter
- b. In Kind Donations
- Postcards send out monthly
  - Special thank you letters for in-kind gifts are sent to donors that have given large gifts, need special cultivation and/or have a "P" written on form.
- 3. It is the policy of The Lord's Place for the Advancement Department to apply for and research non-governmental and non-reporting grants.**
- a. The Director of Grants will keep a log of grants which we can add to as a result of our research. He will file all the relevant grant documents in the Grants Folder on the P Drive and he will alert us of upcoming deadlines
  - b. Our grants will be part of our Advancement Calendar
- 4. It is the policy of The Lord's Place Advancement Department to manage corporate relations.**
- a. Companies with sponsorship potential will be stewarded through Advancement Office
  - b. These same companies will be updated in RE with proper contact information as well coded to be invited to events and solicited for campaigns
  - c. Director of Advancement to work with The Lord's Place Board of Directors, Job Training and Catering to secure new leads and steward properly
- 5. It is the policy of The Lord's Place Advancement Department to manage Major Gifts.**
- a. Manage portfolio of 200 existing donors, through Matrix and RE
  - b. Develop relationships through direct calls and mail, Donor Dinners, Loyalty, Legacy and Leadership Events, and Board facilitation
  - c. Manage stewardship through matrix, quarterly touch points, board and committee thank you cards
- 6. It is the policy of The Lord's Place Advancement Department to manage Planned Giving.**
- a. A letter will be sent to all active donors annually reminding them to include us in their will
  - b. Our newsletters, annual report, and website will have a Planned Giving reminder

# Gift Acceptance Policy

The Lord's Place depends upon and appreciates the donations and support - both financial and in-kind - it receives from individuals, businesses, foundations and organizations of all types.

No gift, whether outright or deferred, will be accepted if under any reasonable set of circumstances, The Lord's Place believes the gift would jeopardize the donor's financial security.

The Lord's Place will refrain from providing advice about the tax implications, or other treatment of gifts, and will encourage donors to seek guidance from their own professional legal and financial advisors to assist them in the process of making their gift.

The Lord's Place generally will accept donations of cash and publicly traded securities. Gifts of in-kind services will be accepted and utilized at the discretion of The Lord's Place. Gifts of in-kind goods or other tangible items will be used by The Lord's Place or placed at The Lord's Place Joshua Thrift Store(s) to support the programs of the agency. Gifts of real property, personal property, and non-liquid assets, may also be accepted.

Any gift whose source, nature or conditions may be inconsistent with or otherwise conflict with the mission of The Lord's Place must be reviewed and approved by the CEO. If the CEO feels a gift should be declined for any reason, the CEO shall consult with the Executive Committee of The Lord's Place and receive its approval before declining to accept.

The Lord's Place will provide acknowledgments to donors meeting IRS substantiation requirements for property received by the charity as a gift. However, except for gifts of cash and publicly traded securities, no value shall be ascribed to any receipt or other form of substantiation of a gift received by The Lord's Place.

The Lord's Place will respect the intent of the donor relating to gifts for restricted purposes and prepare appropriate gift terms, including pledge terms and naming rights. Donors who wish their gifts to remain anonymous, shall have the full discretion of The Lord's Place. Information about the donor and their gift will be restricted to only those staff members or Board members with a need to know.

The Lord's Place will not compensate, whether through commissions, finders' fees, or other means, any staff or Board member, or third party, for directing a gift or a donor to The Lord's Place.