

SHASTA HISTORICAL SOCIETY  
Fundraising Policy

POLICY NUMBER: D.01

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CERTIFICATION

We hereby certify that we are the duly elected and acting President and Development Committee Chair of the Shasta Historical Society, a 501(c)3 Corporation, and that the proceeding Fundraising Policy is duly adopted by the Board of Directors by a two-thirds majority as of September 10, 2015.

IN WITNESS WHEREOF, we have signed our name on September 10, 2015.

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Gary A. Lewis  
President of the Board

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Mike Dahl  
Development Committee Chair

RETENTION

This policy will be in effect indefinitely, unless changed by a two-thirds majority vote of the Board of Directors. In accordance with AASLH STePs Standards and good practices, all policies will be reviewed by the responsible Committee yearly and by the Board of Directors at least once every three years.

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**Introduction**

Shasta Historical Society is a nonprofit organization with the mission to ““To actively preserve, promote, and bring to life the history of Shasta County.”

All donations solicited on behalf of the organization shall be used to further this mission and follow the policies and procedures outlined below.

**Fundraising Policy**

Funds shall be solicited in a respectful manner and without pressure. All third parties not directly affiliated with Shasta Historical Society who wish to solicit funds on behalf of the organization must acquire written permission from the Shasta Historical Society executive director prior to beginning any fundraising activities. Donor designated restrictions on contributions shall be honored. Shasta Historical Society is a nonprofit 501(c)(3) organization and contributions made to the organization are tax deductible to the fullest extent of the law. Written tax receipts shall be issued for all donations. If the donor receives anything in exchange for their donation, such as a dinner or event admission, the tax receipt shall clearly state what portion of the donation is tax deductible.

**Donor Acknowledgements**

Within 7 days of donation receipt, every donor to Shasta Historical Society shall receive a formal acknowledgement/ thank you letter and donation receipt. Donations of \$100 or more will also receive a personal phone call from a board member, the executive director, or staff member.

Every new donor will be included in informational mailings and receive invitations to special events.

**Donor Privacy Policy**

Any information supplied to Shasta Historical Society by donors will be used solely to fulfill their donation and shall not be shared for any reason unless permission is granted by the donor to share such information. All requests to remain anonymous shall be honored. Shasta Historical Society does not sell or share donor lists. Donors who supply Shasta Historical Society with their postal address or email address may be contacted periodically for solicitation purposes and/or with information regarding upcoming events. Donors may request to be permanently removed from the mailing list by contacting us via email, phone or postal mail. All requests to be removed from the Shasta Historical Society’s mailing list shall be honored.

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Donors who supply Shasta Historical Society with their telephone number may request that they not be contacted for telephone fundraising purposes.

**General Gift Acceptance Policies**

Gifts to Shasta Historical Society may take a variety of forms. Many are outright gifts by living donors. Some are bequests or testamentary gifts that take effect upon the donor's death. Others are different forms of deferred or split-interest gifts.

Shasta Historical Society may accept the following types of contributions:

**Cash.** The organization may accept outright cash gifts in any amount. Gifts made to establish a restricted use fund must meet the minimum funding requirements set by the Board (currently \$5,000). A donor may establish a fund in a single transaction, or agree to build to \$5,000 over a period of time mutually acceptable to the donor and ABC Nonprofit.

**Publicly-Traded Securities.** Shasta Historical Society may accept gifts of publicly-traded stocks and bonds at fair market values as determined under Internal Revenue Service rules. Gifts of publicly-traded securities will generally be sold as soon as possible, and the fund the donor established will be credited with the proceeds from the sale, after commissions and expenses, if any.

**Tangible Personal Property.** Tangible personal property may be accepted as a gift, provided that (i) such property is saleable and (ii) the donor agrees that the property can be sold at Shasta Historical Society discretion. The donor is responsible for obtaining a qualified appraisal prior to completing the gift.

**Life Insurance Policies.** The Foundation may accept gifts of life insurance policies, provided that Shasta Historical Society and the donor reach a prior written agreement about arrangements for the payment of any required premiums.

**Real Property.** All proposed gifts of real estate must be evaluated and satisfy due diligence requirements of Shasta Historical Society.

**Closely-Held Stock and Partnership Interests.** . All proposed gifts of closely-held stock and partnership interests must be evaluated and satisfy due diligence requirements of Shasta Historical Society.

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Shasta Historical Society reserves the right to refuse any proposed gift. Gifts Shasta Historical Society may not be directly or indirectly subjected by a donor to any material restriction or condition that would prevent the organization from freely and effectively employing the transferred assets, or the income derived there from, in furtherance of its exempt purposes.

**Shasta Historical Society Sponsored Special Events Policy**

Fundraising events sponsored by Shasta Historical Society must net at least 50% of gross income. A detailed budget must be prepared in advance and approved by the Board of Directors. Proceeds of Shasta Historical Society sponsored events must support Shasta Historical Society identified needs and be approved by the Board of Directors.

Shasta Historical Society will provide clear communication to event guests regarding IRS regulations that limit the charitable deduction amount to only a portion of the ticket price.

All Shasta Historical Society sponsored events must be evaluated for determination of continued offering.