

Oregon Family Support Network Policy

Policy Area: Fundraising	Subject: Policy Manual
Title of Policy: Gift Entry and Recording Policy and Procedure	Contract Area:
Effective Date:	Number:
Approved Date: Revision Date:	See Also:
Approved By:	

1. Rationale or background to Policy:

Oregon Family Support Network solicits and accepts gifts for purposes that will help the organization further and fulfill its mission. Oregon Family Support Network urges all prospective donors to seek the assistance of personal legal and financial advisors in matters relating to their gifts, including the resulting tax and estate planning consequences. It is important have consistency and confidentiality in entry of gifts.

1.2. Definitions:

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2. Policy: The following policies and guidelines govern the entry and recording of gifts made to Oregon Family Support Network for benefit of any of its operations, programs, or services.

2.1 Donation checks received should be sent to the Community Engagement and Development Director for recording.

- 2.1.1 After entry the check will be forwarded to the Finance Director for accounting and depositing.
- 2.1.2 The Community Engagement and Development Director will ensure that the donor information is up to date in the donor management software when gift entry is made.
- 2.1.3 Gifts will be recorded according to the donor's intended use (restricted [specific program or project], unrestricted, endowment, etc.)
- 2.1.4 The source of the gift will be recorded in the donor management software (direct mail appeal, special event, personal solicitation, online gift, etc)
- 2.1.5 When gifts have been received requiring additional acknowledgement a report will be prepared and sent to the appropriate parties.

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- 2.1.6 The Community Engagement and Development Director will prepare thank you letters to be signed by the Executive Director within three days of the receipt of the gift.**
- 2.1.7 Monthly reports of gifts will be prepared by the Community Engagement and Development Director to be reconciled with the Finance Director.**
- 2.1.8 For non-cash gifts, the donor will be supplied with a donation receipt at the time of donation. A copy of this receipt will be retained by the organization and given to the Community Engagement and Development Director for gift entry and recording as with monetary gifts.**