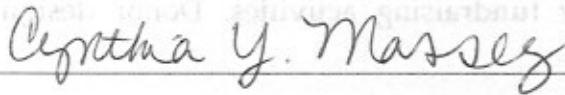


Historical Society of Helotes
FUNDRAISING POLICY

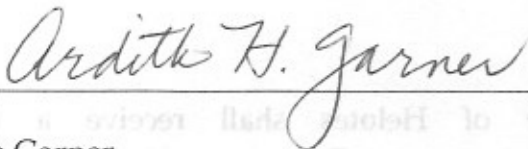
CERTIFICATION

We hereby certify that we are the duly elected President and Vice President of the Historical Society of Helotes, a 501(c)3 Corporation, and that the proceeding Fundraising Policy is duly adopted by the Board of Directors by at least a two-thirds majority as of October 12, 2021.

IN WITNESS WHEREOF, we have signed our name on October 12, 2021.



Cynthia Y. Massey
President of the Board



Ardith Garner
Vice President of the Board

RETENTION

This policy will be in effect indefinitely, unless changed by a two-thirds majority vote of the Board of Directors. This policy shall be reviewed by a duly appointed committee and the Board of Directors at least once every three years.

Historical Society of Helotes
FUNDRAISING POLICY

Section 1. INTRODUCTION

- A) The Historical Society of Helotes is a nonprofit organization with the mission to collect, study, and preserve the history of Helotes, Texas, the surrounding areas and the people who are a part of this area. The Society's focus shall be on educating present and future generations on the importance of history and heritage.
- B) All donations solicited on behalf of the organization shall be used to further this mission and follow the policies and procedures outlined below.

Section 2. FUNDRAISING POLICY

- A) Funds shall be solicited in a respectful manner and without pressure. All third parties not directly affiliated with the Historical Society of Helotes who wish to solicit funds on behalf of the organization must acquire written permission from the Historical Society of Helotes Board of Directors prior to beginning any fundraising activities. Donor designated restrictions on contributions shall be honored.
- B) The Historical Society of Helotes 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.

Section 3. DONOR ACKNOWLEDGEMENTS

- A) Every donor to the Historical Society of Helotes 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.
- B) New donors will be included in informational literature, unless they prefer to remain anonymous to the general public.

Section 4. DONOR PRIVACY

- A) The Historical Society of Helotes does not sell or share donor lists. Any information supplied to the Historical Society of Helotes 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.
- B) Donors who supply the Historical Society of Helotes with their postal address, email address or telephone number may be contacted periodically for solicitation purposes and/or with information regarding upcoming events.

Historical Society of Helotes
FUNDRAISING POLICY

- C) Donors may request to be permanently removed from a Historical Society of Helotes contact list by contacting the Society via email, phone or postal mail. All requests for removal shall be honored.

Section 5. GENERAL GIFT ACCEPTANCE POLICIES

- A) Gifts to the Historical Society of Helotes 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.
- B) Gifts to the Historical Society of Helotes 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. The Historical Society of Helotes reserves the right to refuse any proposed gift.
- C) **The Historical Society of Helotes may accept the following types of contributions:**
- 1) **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 the Historical Society of Helotes.
 - 2) **Publicly-Traded Securities.** The Historical Society of Helotes 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.
 - 3) **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 the discretion of the Historical Society of Helotes. The donor is responsible for obtaining a qualified appraisal prior to completing the gift.
 - 4) **Life Insurance Policies.** The Foundation may accept gifts of life insurance policies, provided that the Historical Society of Helotes and the donor reach a prior written agreement about arrangements for the payment of any required premiums.

Historical Society of Helotes
FUNDRAISING POLICY

- 5) **Real Property.** All proposed gifts of real estate must be evaluated and satisfy due diligence requirements of the Historical Society of Helotes.
- 6) **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 the Historical Society of Helotes.

Section 6. SPONSORED FUNDRAISING EVENTS

- A) Fundraising events sponsored by the Historical Society of Helotes must net a minimum amount of revenue as designated by the Board of Directors. A preliminary budget must be prepared in advance and approved by the Board of Directors. Proceeds of the Historical Society of Helotes sponsored events must support the identified needs of the Historical Society of Helotes and be approved by the Board of Directors.
- B) The Historical Society of Helotes will provide clear communication to event guests regarding IRS regulations that limit the charitable deduction amount to only a portion of the ticket price.
- C) All Historical Society of Helotes sponsored events must be evaluated for determination of continued offering.

Historical Society of Helotes
FUNDRAISING POLICY

ADDENDUM

The board voted on April 13, 2022 to revise Section 3A to read as follows:

Section 3. DONOR ACKNOWLEDGEMENTS

- A) Every donor to the Historical Society of Helotes shall receive a formal acknowledgement/thank you letter and donation receipt. Donations of \$500 or more will also receive a personal phone call from the President.