

Development

And

Fundraising

Policy

Adopted October 2008. Amended July 2012; December 2015; October 2021

OVERVIEW

The Claverack Free Library welcomes the assistance of the public in serving the citizens of the library district and accepts gifts and donations in the interest of improving the library and its services. All gifts and donations are accepted at the discretion of the library director and/or the board of trustees and become the sole property of the library. Such gifts and donations shall be used in the library's best interest, consistent with any predetermined conditions attached to the contribution by the donor and with the library's status as a 501(c) 3 tax exempt organization.

RESPONSIBILITY: While it is the goal of the library trustees, director, and FRIENDS of the library to work towards consolidating all fundraising activities with the FRIENDS group, responsibility for soliciting charitable donations from private sources is currently shared by all three.

COORDINATION: Fundraising activities are coordinated by the trustee-led development committee in conjunction with the director and the FRIENDS group. Fundraising records are maintained jointly by the development committee with support from the technology committee.

No new fundraising initiative or project is to be undertaken by any trustee, staff member, FRIEND or other volunteer prior to consideration and approval of the proposal by the development committee and subsequent approval by the full board and/or the executive committee of the FRIENDS.

Fundraising appeals are prepared jointly by the development committee and the communications committee and, in general, do not require board approval.

MONETARY DONATIONS

Gifts of money shall be designated to support the library's operations, unless the donor restricts the use of the gift to a clearly stated purpose consistent with the mission of the library and its tax exempt status. Such gifts are accepted at the discretion of the library director and board.

The trustees and director may undertake capital campaigns, such as for facility improvements, as necessary. Donations to capital campaigns are earmarked as such by the donor, subject to the restrictions of the library's mission and tax exempt status and accepted at the discretion of the library director and board.

GIFTS OF BOOKS AND OTHER MATERIALS

Gift materials, including books, computers, office equipment and other material items, are accepted or declined at the discretion of the library director.

The library director reserves the right to use gift material as it does any purchased material including distribution to other libraries, donation or sale to a third party, or disposal, without notifying donors of the disposition. All donated personal property, real estate, art objects, paintings, prints, maps, antiques and other collectibles, if accepted, becomes the sole property of the library. However,

specific requests by the donor regarding the disposition of an item may be considered by the director and the board.

The library will not appraise or establish a value for the worth of donated material. The responsibility for such assessment lies with the donor.

Gifts of Archival Material

Donors of local historic materials must submit a completed Local History Deed Gift Form. This form lays out the terms of the donation and conversely, the library's obligations to standard archival practices. The form can be found on the library website or upon request. Historical materials are accepted at the discretion of the library board and director.

MEMORIALS

Donations in honor of a third party, living or deceased, are accepted at the discretion of the library director and the board. Notification of the gift to the honoree will be the responsibility of the library. Commemoration of the gift on the library premises will be by agreement of the donor, the director and board.

GRANT WRITING AND MANAGEMENT

The responsibility for grant writing and management rests with the trustees, director and FRIENDS.

RAFFLES AND GAMES OF CHANCE

As part of its fundraising efforts, the library board and director may conduct raffles, auctions, contests, or games of chance in accordance with relevant state laws. In the case of raffles, auctions and games of chance, the determination of a winner will take place in public view. No trustee, staff member or member of the executive committee of the FRIENDS of the library may be eligible to win any raffle, judged event or contest sponsored by the library.

PLANNED GIVING AND BEQUESTS

Major gifts and bequests are accepted at the discretion of the library director and board and by agreement with the donor.

MAJOR DONOR STEWARDSHIP

Major donors and those designated as sustaining donors have an assigned solicitor, typically a trustee, who is responsible for stewarding the library's relationship with the donor through personalized correspondence, phone calls and emails regarding all gift solicitations and acknowledgements.

SPECIAL EVENTS

The FRIENDS and the trustees manage and direct special fundraising events. These events may include, but are not limited to, donor appreciation events, annual book sales, BookIt (a five kilometer race), and raffles.

The director may also raise funds from local businesses for special events, particularly those that are held jointly with other area libraries.

The director may serve as the designated solicitor for certain local businesses and foundations and assumes the responsibility of maintaining those relationships, writing annual proposals, and writing gift acknowledgments and reports as necessary.

Annual Fundraising Calendar

At the beginning of each new year the library will develop and publish a fundraising/development calendar. The library's traditional fundraising activities are scheduled as follows:

February/March — Launch spring/summer raffle

April/May — Sustainer appeal letter mailing

June — Mid-year newsletter/gift envelope mailing

June/July — donor recognition event

July/August — Bookit 5K race

August/September — raffle winner selection/announcement

October ---Fall book sale

November---End of year fundraising appeal mailing

November---FRIENDS Holiday Sale

