BLUE WATER DEVELOPMENTAL HOUSING, INC.
POLICIES AND PROCEDURES: BOARD INFORMATION

SUBMITTED BY: Executive Director	**DATE SUBMITTED:** 06/15/2021	**SECTION:** Board and Administration	
BOARD APPROVED ON: 09/08/2021	**DATE REVISED:** 04/17/2023, 10/14/2026	**SUBJECT:** Board Fundraising Policy	
ANNUAL REVIEW BY EXECUTIVE DIRECTOR: 09/08/2021, 04/17/2023, 10/14/2026, 11/11/2026		**POLICY #:** BD-001	**PAGE #:** 1 of 3

I. APPLICATION

The provisions stated herein shall apply to the Board of Directors, Executive Director, employees, volunteers, donors, and all individuals involved in fundraising, donor relations, gift acceptance, gift administration, and stewardship activities conducted on behalf of Blue Water Developmental Housing (BWDH).

II. POLICY

It is the policy of Blue Water Developmental Housing, Inc. to conduct fundraising activities in a manner that promotes public trust, protects donor rights, ensures compliance with all applicable laws and regulations, maintains ethical fundraising practices, and supports the mission and long-term financial viability of the organization. Board members are expected to support fundraising efforts through personal financial contributions according to their means and through active participation in fundraising activities. BWDH shall maintain donor confidentiality, administer gifts responsibly, follow established gift acceptance standards, avoid conflicts of interest, and comply with all applicable federal and state fundraising requirements.

III. NOTIFICATION/PROCEDURE

WHO	DOES WHAT
Board Members	1. Support the organization's fundraising efforts through active participation and annual financial contributions according to their personal means.
Executive Director and Management Staff	2. Provide ongoing fundraising training when procedures, fundraising activities, or applicable legal and regulatory requirements change.
Board of Directors	3. Provide oversight of fundraising activities and ensure fundraising practices support the mission, financial viability, and legal compliance of BWDH.
Board of Directors and Staff	4. Ensure donors receive accurate information regarding the organization's mission, governance, financial condition, use of

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	donations, fundraising representatives, and donor rights.
Executive Director or Designee	5. Prepare donor acknowledgments, receipts, and required donor reports within reasonable timeframes.
Board of Directors and Staff	6. Maintain donor confidentiality, safeguard donor records, honor confidentiality requests, and limit use of donor information to organizational purposes.
	7. Respond promptly and honestly to donor inquiries and provide donors access to appropriate records and financial information.
Executive Director or Designee	8. Plan, administer, and manage fundraising activities and gift acceptance procedures subject to Board oversight.
Executive Director	9. Accept and administer routine unrestricted gifts of cash, checks, credit cards, and publicly traded securities.
Board of Directors and Executive Director	10. Review and approve non-routine gifts in accordance with established authority limits, including gifts of tangible property and other special contributions.
	11. Review restricted gifts and ensure all accepted gifts further the mission, objectives, and long-term financial stability of BWDH.
	12. Refuse gifts that are inconsistent with the mission of BWDH, create unacceptable obligations, expose the organization to liability, involve unlawful discrimination, or

	otherwise present unreasonable risks or costs.
Executive Director	13. Ensure noncash gifts are appropriately evaluated, documented, appraised when required, and either utilized by BWDH or converted to cash in accordance with organizational policy.
	14. Inform donors that BWDH does not provide legal, tax, financial, investment, or estate-planning advice and may require supporting documentation before accepting certain gifts.
Legal Counsel	15. Review donor agreements, planned-giving arrangements, contracts, and other legal documents when required and advise BWDH regarding gift acceptance matters.
BWDH and/or Donor's Professional Advisors	16. Ensure legally binding gift agreements and complex gift arrangements receive appropriate legal review while BWDH does not assume responsibility for professional fees.
Board of Directors	17. Monitor fundraising activities for conflicts of interest, self-dealing, or personal financial benefit and take corrective action when necessary.
Executive Director and Board of Directors	18. Ensure gift valuation, IRS reporting, acceptance procedures, and all fundraising activities comply with applicable local, state, and federal laws and regulations.