



Fundraising,  
Donor Privacy  
and Gift  
Acceptance  
Policies

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## Fundraising Policy

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The Mara Elephant Project (MEP) understands that the funding it relies upon to do its work must come from a diverse range of sources and so it will actively develop a mix of fundraising streams in a way that:

- Engages and inspires its supporters and respects their interest in and contributions to protecting elephants
- Meets its current funding commitments and provides sustainable sources of funding for the long-term including any planned expansion of MEP's activities
- Manages risk and maximizes return on funding received

This policy is intended to provide support to MEP's staff and Board of Trustees (and any other formal or informal group, such as a Fundraising Committee) in planning and implementing fundraising activities on behalf of MEP. This policy should be read in conjunction with all other MEP policies.

1. Fundraising activities and relationship must reflect MEP's mission and values.
2. MEP will always work within the law and will strive to achieve recognized 'best practice' in fundraising activities. It will consider membership of 'self-regulatory' bodies when appropriate.
3. Working within the fundraising policy is part of every employee's and Board of Trustees' responsibilities.
4. MEP will ensure that its contractual arrangements and relationships with partners and suppliers support the principles and values set out within this policy.
5. MEP is committed to knowing the source and destination of its funds. It will not accept a donation or support where it is clear that to do so would: a) be illegal; b) harm MEP's reputation; c) harm MEP financially, including where the demands of the funder are not proportionate to the size or type of gift, donation or grant; d) go beyond MEP's objectives or scope; e) affect MEP's independence.
6. MEP will have a clear definition and description of the circumstances in which it will consider accepting or refusing support and for ensuring that the source of large donations is known.
7. MEP values its supporters and is accountable to them and will ensure that their gifts, donations and grants are acknowledged and recognized appropriately.
8. MEP will ensure that gifts, grants and donations are properly processed, recorded and managed and that reporting requirements are met.
9. MEP is committed to transparency, including providing clear, truthful information on its work to supporters and openly reporting how donor funds are spent.
10. MEP respects the privacy of its supporters and is committed to managing donors' information responsibly. Thus, all personal information collected by MEP will be confidential and will not be traded or sold to a third party.

This policy was reviewed and approved by MEP's Board of Trustees on 3<sup>rd</sup> December 2020.

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## Donor Privacy Policy

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The Mara Elephant Project (MEP) respects the privacy of its supporters and is committed to safeguarding personal information and ensuring that donor privacy is protected. This policy is intended to assure donors of this commitment. It applies to all information received by the organisation, both online and offline, as well as any electronic, written, or oral communications. MEP uses donors' information to understand their interests in its mission and to update them on the organisation's plans and activities. It may be shared with staff, board members, volunteers and consultants only on a confidential and "need-to-know" basis. MEP assures donors that their names and addresses will not be traded or sold with any third party, nor send donor mailings on behalf of another organisation. To the extent any donations are processed through a third-party service provider, our donors' information will only be used for purposes necessary to process the gift/donation. It is MEP's policy to communicate with donors according to their expressed preferences whenever possible. We will honour all donor requests to be removed from MEP's communications. To do so, or if you have comments or questions about this policy, please contact us at [info@maraelephantproject.org](mailto:info@maraelephantproject.org). MEP subscribes to the Donor Bill of Rights, which was created by the Association of Fundraising Professionals, the Association for Healthcare Philanthropy, the Council for Advancement and Support of Education, and the Giving Institute.

### **Donor Bill of Rights**

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the non-profit organisations and causes they are asked to support, we declare that all donors have these rights:

- I. To be informed of the organisation's mission, of the way the organisation intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
- II. To be informed of the identity of those serving on the organisation's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
- III. To have access to the organisation's most recent financial statements.
- IV. To be assured their gifts, grants and donations will be used for the purposes for which they were given.
- V. To receive appropriate acknowledgement and recognition.
- VI. To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.
- VII. To expect that all relationships with individuals representing organisations of interest to the donor will be professional in nature.
- VIII. To be informed whether those seeking donations are volunteers, employees of the organisation or hired solicitors.
- IX. To have the opportunity for their names to be deleted from mailing lists that an organisation may intend to share.

### **Refund of Donations**

It is not the normal practice of MEP to refund donations. However, if a donor has made an error in making their donation or change their mind about contributing to MEP, we will honor their request, where legally possible, for a refund made within 15 business days of the donation being made. To request a refund, an email should be sent to [info@maraelephantproject.org](mailto:info@maraelephantproject.org) including the date of the donation, name and amount. Refunds are returned using the original method of payment, except cash donations will be returned via check. Donation made by credit card, will be refunded to the same credit card. Changing business practices and circumstances may require that we make changes to this privacy policy. Thus, we reserve the right to change this privacy policy at any time.

This policy was reviewed and approved by MEP's Board of Trustees on 3<sup>rd</sup> December 2020.

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## Gift Acceptance Policy and Principles

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MEP relies on the generosity of its supporters to achieve its mission to protect elephants. Thus, it seeks funding from a wide range of donors, including individuals, corporates, trusts and foundations, governments and other funding agencies. This Gift Acceptance Policy, Principles and Procedure govern the acceptance of gifts, grants and donations (hereafter referred to as gifts) by MEP and partnerships with donors and others. It also provides guidance to prospective donors and/or their advisors when making gifts to MEP.

### A. Gift Acceptance Policy

1. MEP will accept only such gifts as are legal and consistent with its purpose and mission and will not harm MEP's reputation, financial health, and independence.
2. MEP will refrain from providing advice about matters relating to their gifts, such as tax and other financial consequences.
3. MEP will make every effort to ensure accepted gifts are in the best interests of the organisation and the donor. MEP subscribes to the Donor Bill of Rights, which was created by the Association of Fundraising Professionals, the Association for Healthcare Philanthropy, the Council for Advancement and Support of Education, and the Giving Institute (see MEP's Donor Privacy Policy for more information).
4. All gifts will be reviewed and approved by MEP's fundraising staff in collaboration with MEP's CEO to ensure that they are consistent with MEP's mission and consonant with its current or anticipated future programmes.
5. MEP accepts the following types of gifts, though the list below may not be exhaustive.
  - **Cash gifts** in any form, including by check, money order, credit card, wire transfer, or online.

The following types of gifts will be reviewed to assess their financial and/or legal obligations prior to acceptance:

- **Marketable securities**, which are likely to be sold promptly upon receipt unless otherwise agreed by the CEO and/or Board of Trustees
  - **Real estate**, including developed or undeveloped property
  - **Planned gifts**, such as bequests in wills and trusts, charitable gift annuities or charitable remainder trusts
  - **Life insurance or retirement plans**, naming MEP as beneficiary
6. MEP accepts unrestricted gifts and gifts restricted for specified areas or programmes of work. Restricted gifts will be reviewed by MEP's fundraising staff in collaboration with the CEO prior to acceptance due to special obligations or liabilities that they may pose for MEP.
  7. MEP will consider refusing gifts that are too restrictive in nature or for which donor requirements cannot be reasonably met. An example of a gift that may be too restrictive in nature is that which is too difficult or expensive to administer in relation to its value.
  8. MEP will recognize significant gifts and such recognition will be developed in cooperation with the donor and will be consistent with the level of support provided.

9. MEP will not accept any support that requires an endorsement of a company or its products.
10. MEP will respect the intent of donors wishing to remain anonymous. With respect to such gifts, MEP will restrict information about the donor to only those staff or Board of Trustees with a need to know.
11. MEP will not compensate any third party for directing a gift or a donor to the organisation.

**B. Gift Acceptance and Partnership Principles**

MEP will apply the following principles when reviewing gifts to the organisation and/or establishing partnerships with donors or organisations, including corporates:

1. MEP will at all times maintain autonomy and independency of action, meaning donor relationships and other partnerships will not impinge on MEP's freedom to comment on or address issues determined at its discretion.
2. MEP's intellectual property will be protected at all times.
3. MEP will maintain transparency about the financial support it receives and with whom it partners.
4. MEP and its donors and/or partners will when necessary discuss and agree on the roles and responsibilities of each to achieving our shared aims, including having robust gift or partnership agreements in place.

This policy was reviewed and approved by MEP's Board of Trustees on 3<sup>rd</sup> December 2020.

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## Required Disclosures for Written Solicitations

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A copy of the latest financial report, registration filed by this organization, and a description of our programs and activities may be obtained by contacting us at: Sidekick Foundation, Inc., 4000 W. 106<sup>th</sup> Street Suite 125-238 Carmel, IN 46032, 317-832-8313. Sidekick Foundation, Inc. was formed in Indiana. If you are a resident of one of the following states, you may obtain financial information directly from the state agency:

**Florida:** A copy of the official registration and financial information may be obtained from the division of consumer services by calling toll-free, within the state, 1-800-helpfla, or via the internet at [www.FloridaConsumerHelp.com](http://www.FloridaConsumerHelp.com).

**Mississippi:** The official registration and financial information of the Sidekick Foundation, Inc may be obtained from the Mississippi Secretary of State's office by calling 1-888-236-6167.

**New Jersey:** Information filed with the attorney general concerning this charitable solicitation and the percentage of contributions received by the charity during the last reporting period that were dedicated to the charitable purpose may be obtained from the Attorney General of the State of New Jersey by calling (973) 504-6215 and is available on the internet at <http://www.state.nj.us/lps/ca/charfrm.htm>.

**New York:** Upon request, a person may obtain from the organization or from the charities registry on the attorney general's website, a copy of the last financial report filed by the organization with the attorney general.

**North Carolina:** Financial information about this organization and a copy of its license are available from the State Solicitation Licensing Branch at 1-888-830-4989 (within North Carolina) or (919) 807-2214 (outside of North Carolina). The license is not an endorsement by the State."

**Pennsylvania:** The official registration and financial information of the Sidekick Foundation, Inc may be obtained from the Pennsylvania Department of State by calling toll-free, within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement."

**Virginia:** A financial statement is available from the State Office of Consumer Affairs in the Department of Agriculture and Consumer Services, P.O. Box 1163, Richmond, VA 23218.

**Washington:** Potential donors can obtain additional financial disclosure information from the office of the Secretary of State at 1-800-332-4483 or <http://www.sos.wa.gov/charities/>.

**West Virginia:** West Virginia residents may obtain a summary of the registration and financial documents from the Secretary of State, State Capitol, Charleston, WV 25305. Registration does not imply endorsement.

### **REGISTRATION WITH A STATE AGENCY DOES NOT CONSTITUTE OR IMPLY ENDORSEMENT, APPROVAL OR RECOMMENDATION BY THAT STATE.**

This policy was reviewed and approved by MEP's Board of Trustees on 3<sup>rd</sup> December 2020.

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