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## FUNDRAISING, GIFT AND DONATION POLICY

### Carroll County Public Library

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The Board of Trustees of the Carroll County Public Library (the Board) recognizes that the library engages in fundraising and solicitation activity. In order to comply with federal, state, and local laws, as well as applicable ethical norms, the Board has endorsed the following guidelines for the cultivation, acceptance and use of gifts that support the mission of Carroll County Public Library (CCPL).

The Board encourages the contributions of individuals and organizations through bequests, trusts, and donations of monetary or other tangible assets for library purposes. These gifts help CCPL introduce and enhance services beyond the scope of the regular financial support provided by Carroll County Government and the State of Maryland.

In Maryland State Education Law, under powers and duties, a (county) library board may accept any gift, grant, or appropriation for library purposes from any person under any appropriate terms and conditions and own and dispose of these gifts, grants, and appropriations (Article 23 §405). CCPL welcomes gifts of money, books, and other materials, equipment, works of art, documents, photographs, or property of any kind through which CCPL's mission is advanced and strengthened.

CCPL maintains 501(c) (3) status from the Internal Revenue Service. Gifts to CCPL are income tax deductible to the extent allowed by law.

CCPL shall provide all donors with specific acknowledgment of charitable contributions, where applicable, in accordance with legal requirements for proper donor substantiation and organization disclosure.

#### GENERAL FUNDRAISING PROVISIONS:

- A. **OVERSIGHT** – The Executive Director is responsible for all strategic development, fundraising, and solicitation activity, and provides periodic and annual review to the Board of Trustees.
- B. **TRUTH AND ACCURACY** - All solicitation and fundraising materials and other communications to donors and the public shall clearly identify the Carroll County Public Library and be accurate and truthful. CCPL staff shall review fundraising or solicitation materials prior to publication to prevent:

1. Material omissions or exaggerations of fact, use of misleading photographs, or any other communication which would tend to create a false impression or misunderstanding.

2. Any statements or content that would tend to create unrealistic donor expectations of what the donor's gift will actually accomplish.

C. USE OF FUNDRAISING PROFESSIONALS – From time to time CCPL may contract for fundraising services. Third party fundraisers engaged by the library must be registered with the appropriate state and local authorities, and their representation of the library must be evidenced by a written agreement approved by the Executive Director after a formal bid process.

1. COMPENSATION – When contracting with a third party fundraiser, an invitation for bids shall be issued and include specifications, and contractual terms and conditions applicable to the fundraising campaign. The contract shall be awarded with reasonable promptness by appropriate notice to the lowest responsible and responsive bidder whose bid meets the requirements and criteria set forth in the invitation for bids.

D. USE OF LIBRARY STAFF - *Designated* CCPL staff may engage in fundraising to provide additional funds to support specific events or initiatives. To assure a coordinated effort, CCPL will provide appropriate guidelines, training and procedures for staff.

E. PARTNERSHIP WITH THE FRIENDS OF CARROLL COUNTY PUBLIC LIBRARY  
The Friends of Carroll County Public Library was formed with the mission of building a greater understanding of CCPL's role in the community. The Friends support library activities and may fundraise for this purpose.

F. PARTNERSHIP WITH THE COMMUNITY FOUNDATION OF CARROLL COUNTY INC. – CCPL maintains a fund at the Community Foundation of Carroll County (The Foundation), Inc. This fund is known as “The Friends of Mary Lou Dewey Sculpture Park” and serves the sole purpose of supporting beautification of Mary Lou Dewey Park at the Westminster Library. CCPL and The Foundation have a signed Memorandum of Understanding outlining the utilization of this fund. CCPL promotes and encourages donations to the fund to support Park related needs.

G. COMPLIANCE WITH LAW – In addition to any other requirements of this policy, all fundraising activities for CCPL shall be conducted in accordance with applicable law.

#### GENERAL GIFT AND DONATION PROVISIONS:

A. ACCEPTANCE - The Library reserves the right to refuse any gift that the Executive Director in his or her sole discretion deems to be not in the best interests of CCPL to accept. All non-monetary donations must be unconditional, transferring ownership and all the rights of ownership to CCPL. In the event that a gift is not accepted, the donor may appeal the decision to the Library Board of Trustees.

- B. DIRECT MONETARY GIFTS – UNRESTRICTED - CCPL welcomes gifts of cash or stock. If donated funds are unrestricted, they may be expended by authorization of the Executive Director, or designee, within the scope of his or her statutory authority. If the gift is used to purchase library materials, CCPL staff will try to accommodate the donor's preferences, provided they are consistent with the Collection Development Policy. Selections purchased from these funds will be made by the staff. Contributions toward subscriptions must be made with funds adequate to cover a two-year commitment. Monetary gifts should be made payable to the Carroll County Public Library.
- C. MEMORIAL GIFTS - CCPL welcomes monetary gifts for purchase of materials for the collections given in recognition or memory of individuals. Whenever possible, CCPL staff will choose items which accommodate the donor's preferences, provided they are consistent with the Collection Development Policy
- D. DIRECT MONETARY GIFTS – RESTRICTED - If donated restricted funds are accepted, they must be expended according to the donor's conditions.
- E. NON-MONETARY GIFT – BOOKS AND LIBRARY MATERIALS – CCPL accepts donations of materials in good condition, but reserves the right to evaluate and dispose of them in accordance with the criteria applied to purchased materials. Those items not added to CCPL collections may be offered for sale, utilized for promotional purposes, or transferred to other institutions. Unsuitable items will be discarded or recycled. A receipt of materials will be provided for tax purposes upon request of the donor. Library Staff are not permitted to place a value on gift materials. Special collections will be accepted only by the Executive Director.

Materials used extensively by customers sustain losses through ordinary wear, theft, and mutilation. Resources with obsolete and/or misleading information are discarded. CCPL, therefore, cannot guarantee that any gift or donation will be part of the collection permanently. Excess items may be offered for sale, given to other libraries, or discarded.

- F. REAL ESTATE OR OTHER PERSONAL PROPERTY - CCPL may accept gifts of real property that either support or could be sold to support the mission of CCPL. Such offers will be handled by the Executive Director, who, in consultation with the Board of Trustees, will determine the suitability of the gift and the terms of acceptance compatible with CCPL's mission and policies, the donor's intent, and applicable laws.
- G. ART AND DECORATIVE OBJECTS - In general, gifts of art objects shall be of local interest to the community, of a professional quality, well-executed, and in good condition. As with all other gifts, art objects will be accepted only with the donor's full agreement that CCPL has the right to handle or dispose of the gift in the best interests of CCPL. Because of CCPL's limited display and storage areas and focus on its primary mission as a library, potential donors of art and decorative objects are requested to discuss any possible gifts in advance with the Executive Director. No gifts posing a danger or threat to customers will be accepted (e.g., metal sculpture with sharp, moving parts). Donations of art must be unconditional, transferring ownership and all the rights of ownership to CCPL. Objects accepted must align with CCPL's Policy for Community

Postings, Display Cases, and Artwork Exhibit Space.

H. VALUATION - CCPL will provide a timely, written acknowledgement of the receipt of gifts to the donor and, if desired, to a recognized individual or organization. For non-monetary gifts, income tax regulations leave the determination of the gift's monetary value to the donor. Donors wishing to have an appraisal of their gifts for income tax purposes should have that completed prior to donation.

I. IN-KIND DONATIONS - CCPL may accept in-kind donations such as merchandise coupons or complimentary admissions in support of CCPL programs. In-kind donations will be acknowledged in CCPL's promotional materials.

J. ETHICS - Trustees, employees, and/or volunteers may not make any promise to a donor, or agree to any donor-directed changes in the vision, policies, services, collections or CCPL programs as a result of a solicitation or contribution. Nor should any vendor be chosen based on a stated or implied contribution to CCPL. All contributors have the right to obtain complete and timely information on how their donation was/will be used. Trustees, employees, and/or volunteers will avoid use of techniques that are coercive, intimidating or intended to harass potential donors. CCPL shall attempt to avoid accepting a gift from a prospective donor which would knowingly place a hardship on the donor.

K. DONOR PRIVACY POLICY – CCPL respects the privacy of donors.

1. While CCPL publicly acknowledges donors, CCPL shall not sell or otherwise make available the contact information of its donors, except where disclosure is required by law.

2. CCPL shall not send mailings on behalf of other organizations, except in cases when the organization is collecting donations for the express purpose of enhancing CCPL, i.e., the Community Foundation of Carroll County sculpture project.

3. For complete information regarding privacy policy practices, refer to the Carroll County Public Library Privacy Policy.

L. NAMING RIGHTS – When a gift is offered to CCPL in exchange for the naming of a physical space or property, a Naming Rights Gift Agreement form must be completed.

OTHER PROVISIONS: CCPL seeks to engage its work within the community through various partnerships. Partnerships requiring fundraising activity with other community organizations requires approval by the Executive Director. For information regarding sponsorships and partnerships refer to the Carroll County Public Library Sponsorship and Partnership Policy. All CCPL policies are reviewed regularly and revised as needed.

Approved October 22, 2014  
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