

## **ASSJ SOLICITATION AND GIFT ACCEPTANCE POLICY<sup>1</sup>**

Financial support for the work of the Association for the Scientific Study of Jewry (ASSJ) is essential to achieving our mission. Along with dues paid by members, we also seek support from those who value our scholarship. This policy statement is designed to govern the solicitation and acceptance of support. The provisions below apply to all gifts solicited and accepted by ASSJ. The policy provides guidance for the Board and members with respect to their responsibilities concerning gifts to ASSJ, and guidance to prospective donors when making gifts to ASSJ. The ASSJ Board reserves the right to amend or revoke this Policy at any time, and to make exceptions as deemed necessary by the voting members of the Board.

The mission of the Association for the Scientific Study of Jewry is to serve our multidisciplinary membership and to advance the social scientific study of Jewry as a science and profession. ASSJ is a non-profit organization, exempt from federal income tax under §501(c)(3) of the Internal Revenue Code, and gifts to ASSJ are deductible charitable contributions, to the extent permitted under law.

### **1. Overarching Provisions**

ASSJ may seek and accept charitable donations that further our mission.

ASSJ will accept gifts paid by cash, check (made payable to ASSJ), and credit card.

ASSJ will accept gifts for specific purposes (designated/restricted); however, restrictions that support any new activity will need to be approved by the Board.

ASSJ shall not accept gifts that:

- Violate the terms of the ASSJ's Gift Acceptance Policy (unless an exception is approved by the Board);
- Jeopardize the ASSJ's status as a tax-exempt organization under federal or state law;
- Are deemed too difficult or expensive to administer;
- Are for purposes that do not further the ASSJ's objectives; or
- Could damage the reputation of the ASSJ.

### **2. Considerations for Specific Forms of Gifts**

Acceptance of gifts other than by an instrument that can be directly deposited in the Association's checking account can only be done in consultation with the Board.

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<sup>1</sup> This policy statement is based on a policy statement of the American Sociological Association

### **3. Tax Deductions**

ASSJ will provide each donor with a written receipt or other acknowledgement of the donor's gift that complies with the then-existing requirements of the Internal Revenue Code and regulations regarding substantiation of charitable contributions.

### **4. Additional Provisions**

**Gift Agreements**—Any gift of \$5,000 or more with restrictions shall require a written gift agreement with the donor.

**Restricted Donations**—Restricted gifts for activities that are already underway will generally be accepted. Restricted donations for new activities of less than \$5,000 may be accepted if the President, Vice-President, and Treasurer concur, provided that the activity aligns with the mission of the ASSJ and does not require additional resources in order to achieve the intended outcome. Restricted donations for new activities of >\$5,000 must be approved by the ASSJ Board.

Named funds require a minimum contribution to be of \$15,000. The Board will set standards for organization-wide naming opportunities and other forms of donor recognition and must approve named funds. Naming agreements shall be in writing, and shall reserve ASSJ's right to change the name if ASSJ's continued public association with the named person would be likely to damage ASSJ's reputation or its ability to accomplish its purposes.

### **5. Fundraising Authority**

To ensure that all fundraising efforts on behalf of ASSJ conform with legal, financial, and other external requirements as well as the priorities of ASSJ's mission:

No subgroup of ASSJ, or individual member may engage in any development activities without prior approval.

The President and Vice President may grant approval to solicit funds of \$5,000 or less from a company or organization. For solicitations of more than \$5,000 from a company or organization, approval must be granted by the Board.

The President or Vice President may grant approval to solicit funds from individuals for an event or project requiring a campaign of \$5,000 or less. For events or projects requiring more than \$5,000 of combined individual contributions, approval must be granted by the Board.

### **6. Implementation of This Policy**

The President, in concert with the Vice President and the Secretary or Treasurer, is responsible for implementing this policy. The President will bring the following decisions to the Board for review:

- Acceptance of gifts of real estate;

- Acceptance of gifts of tangible personal property of over \$5,000;
- Acceptance of restricted gifts of over \$5,000 for new activities;
- Acceptance of gifts of over \$5,000 that are ambiguous with respect to conformity with this policy;
- Acceptance of gifts that are exceptions to this policy;
- Anything else at the President or Vice President's discretion.

ASSJ shall seek the advice of legal counsel in matters relating to acceptance of gifts when appropriate.

ASSJ encourages prospective donors to seek the assistance of their own legal and financial advisors in matters relating to their gifts and the resulting tax and estate planning consequences.

## **7. Reporting of Gifts**

The Treasurer shall provide regular reports to the Board of all gift income. The President and Vice President will also provide regular reports to the Board of solicitations and status of fund-raising efforts.