

MARYLAND VOLUNTEER LAWYERS SERVICE (MVLS)  
**FUNDRAISING POLICY**

**I. MVLS Mission and Core Values**

- a. The mission of MVLS is to remove barriers to justice through free legal help, community engagement, and advocacy for more equitable laws. Our core values include teamwork, passion for MVLS' mission, commitment to eliminating systemic barriers to justice based on race and economic disparities, commitment to clients and volunteers and community partners, initiative, and promise to our donors.
- b. Our promise to donors: MVLS accepts the responsibility that comes with support from our donors, private foundations, government funding and other supporters. With funds entrusted to us, we utilize each dollar to maximize help for Marylanders in need and remove barriers to justice. We also seek to work with funders to identify ways we can invest together in disinvested communities.
- c. A promise to donors is included in our core values because of the important role that donors play at MVLS. The generosity of the donors and institutions that choose to invest in MVLS make it possible for us to enact our mission and programs.
- d. The fundraising policy outlined below is intended to articulate the additional values and expectations that serve as the foundation for the fundraising program.**

**II. Gift Solicitation and Acceptance**

- a. MVLS accepts financial support from individuals, businesses, foundations, and governmental organizations (donors) to support our mission to remove barriers to justice.
  - i. When seeking gifts, MVLS reserves the right to be selective about partnering with donors based on alignment with our mission, core values, and organizational capacity.**
- b. **Unrestricted gifts** are the most powerful way that donors can support MVLS. These gifts allow MVLS to make financial decisions that support our mission.
  - i. Before accepting a restricted gift, the Executive Director, in consultation with the Development Director, Deputy Director, and Board of Directors as needed, should consider alignment with the organizational mission, values, programs, and capacity and weigh any financial or administrative burden created by the gift. **Acceptance of a restricted gift** by MVLS indicates the organization's intent to use the gift for the donors' stated purpose.
- c. Types of Gifts. In the course of its regular fundraising activities, MVLS will generally accept donations of money, securities, and in-kind services. Some gifts are subject to special conditions, outlined below:
  - i. Marketable securities. Gifts of marketable securities will generally be accepted. All readily marketable securities will be sold immediately upon receipt either through MVLS' broker on the open market or to MVLS' investment fund if, in the opinion of MVLS' investment counselors, the security is more desirable than another security in the fund. If the number of shares involved in a sale on the open market is sufficient to have a depressing impact on the price of the stock, in the opinion of MVLS' broker, the sale may be extended over a period of time necessary to avoid such an impact. Stock controlled under Securities and

Exchange Commission Rule 144 will be held until the restriction on sale expires and then will be immediately sold in the same manner as in the case of readily marketable securities.

- ii. Illiquid securities. Gifts of securities which are not readily marketable will be accepted under the following conditions:
  - 1. Gifts of closely held corporate stock would be carried on MVLS' books at \$1.00, in the absence of financial information that would enable determination of "book value." Such securities will be carried at "book value" as long as audited financial statements are provided to MVLS so that "book value" can be substantiated.
  - 2. Gifts of bonds that require a "holding" period will be accepted and liquidated when the holding period has expired.
- iii. Non-Cash Gifts (In-Kind Services and Gifts of Real Property). The official tax receipt sent to the donor from MVLS for a non-cash gift will describe the gift but will not assign value to the non-cash gift. For non-cash gifts (except publicly traded securities) with a value more than \$5,000, it is necessary for the donor to complete and file an IRS Form 8283 to be eligible for a charitable contribution income tax deduction. (Compliance with IRS requirements is the responsibility of the donor). Any appraisal fees associated with the gift- in-kind or gifts of real property shall be borne by the donor and not MVLS. Because of the potential for special liabilities to MVLS, land, buildings or other unusual gifts may only be accepted upon approval of the Board of Directors.
- d. **MVLS reserves the right to reject a gift for any reason, including because gift acceptance would compromise or contradict our mission or core values or create an undue financial or administrative burden.**

### III. Gift Acknowledgement

#### a. **Stewardship and Recognition**

- i. MVLS is in the practice of publishing donors' names in a digital annual report available at [www.mvlslaw.org/annual-report](http://www.mvlslaw.org/annual-report). Donors can opt out of this recognition by requesting to make an anonymous gift (email Katie Sutton at [ksutton@mvlslaw.org](mailto:ksutton@mvlslaw.org)).
- ii. **Recognizing donors is *not* the mission of MVLS**, and we take seriously the responsibility to maximize gifts to remove barriers to justice. Therefore, donor recognition remains at the discretion of the Development Director and Executive Director. MVLS generally will not brand its client materials or market programs (I.e. clinics, or institutional programs) with donors' information.
- iii. MVLS is committed to truthful communication with all constituents, including donors. MVLS shares news of its programs and impact through email newsletters, online at [mvlslaw.org/news](http://mvlslaw.org/news) and via social media (on Facebook and Instagram @MVLSProBono and on LinkedIn). Following some or all of these sources is a great way for donors and other constituents to stay informed about the impact of their gifts as well as relevant news about MVLS and its partner organizations.

- iv. Donors have a right to stay informed about the organization's governance and financial stability. MVLS' most recent financial statements are available to donors upon request to Katie Sutton at [ksutton@mvlslaw.org](mailto:ksutton@mvlslaw.org). MVLS' board list is available on its website at [www.mvlslaw.org/about-us](http://www.mvlslaw.org/about-us).

#### IV. Other Rights and Responsibilities

##### a. Donor Privacy

- i. MVLS does not sell donors' or prospective donors' information. All information concerning donors or prospective donors, including their names, addresses, and telephone numbers, the names of their beneficiaries, the amount of the gift, and similar information, shall be kept strictly confidential by the Maryland Volunteer Lawyers Service and its staff unless permission is obtained from the donor to release such information.

##### b. Our Privacy

- i. Because of the nature of MVLS' work, volunteers and staff are often privy to sensitive information about clients and former clients. This information is confidential. Donors and staff are free to talk about MVLS' programs and their position but are not permitted to disclose clients' names or talk about them in ways that will make their identity known without express prior consent.

Sources:

*CCS Fundraising  
Community Centric Fundraising  
Legal Aid Justice Center  
National Council of Nonprofits  
Station North Tool Library*

Questions about this policy or about donating to MVLS should be directed to Susan Francis, Executive Director and Katie Sutton, Development Director at [sfrancis@mvlslaw.org](mailto:sfrancis@mvlslaw.org) and [ksutton@mvlslaw.org](mailto:ksutton@mvlslaw.org).