



# Policies & Procedures

## Contents

<a href="#">Background and Mission</a> .....	1
<a href="#">Fundraising Activity Guidelines</a> .....	2
<a href="#">Fundraising Activities by Friendship Community Team Members</a> .....	2
<a href="#">Soliciting and Receiving In-Kind Donations</a> .....	3
<a href="#">Guidelines for Marketing Group Proposals</a> .....	4
<a href="#">Flowers and Cards Policy</a> .....	4
<a href="#">Terminology</a> .....	5
<a href="#">Mailing List Policy</a> .....	5
<a href="#">Mission Fit Projects &amp; Exhibit/Event Policy</a> .....	6
<a href="#">Gift Acceptance Policy</a> .....	6
<a href="#">Social Media Policy</a> .....	9
<a href="#">Volunteer Policies &amp; Procedures</a> .....	11

### Background and Mission

Friendship Community is a faith-based, non-profit organization recognized by the Internal Revenue Service as a 501(c)(3).

Our mission is to cultivate the capabilities of Individuals with Intellectual Disability and Autism. Our faith-based disability services, including residential services, day programs, and life enrichment opportunities help to *Impact the World with Capabilities*.

## Fundraising Activity Guidelines

All fundraising activities should follow these basic guidelines:

- All fundraising activities should fit into the mission of Friendship Community, which is to provide supports and services for adults with Intellectual Disability and Autism. All activities should portray ethical standards and behavior.
- Fundraising activities should help fund identified needs.
- Fundraising within Friendship Community can happen publicly and privately. It is recognized that the overall organization as well as individual programs can and shall be participating in fundraising activities.

For fundraising activities in individual programs, these guidelines should be followed:

- The fundraising activity should portray a positive image of Friendship Community.
- The fundraising activity shall educate donors and potential donors of the broad view of Friendship Community. Although raising funds for a certain program or project, this should not set that program apart as a separate entity.
- The fundraising activity shall not conflict with the donor or potential donor's pledges or regular support of other Friendship Community projects.
- The fundraising activity shall not take funds away from priority organizational projects or needs.
- Scheduling for the activity shall be planned around the Friendship Community calendar of events and should not conflict with other Organizational activities.
- The Development Office should be consulted before planning events, setting fundraising goals, and identifying and soliciting donors. All contributions shall be channeled through the Development Office for proper accounting and recognition.

## Fundraising Activities by Friendship Community Team Members

We are grateful that many of our Team Members are involved in interests outside of their work that includes fundraising for other charities and church and school activities.

We also recognize that these fundraisers can create tension and confusion when presented in the workplace.

The expectations of Friendship Community are as follows:

Team Members are allowed, and encouraged, to place fundraising materials (order forms, posters, etc.) in the common staff areas of the homes and offices and to remove them prior to or upon completion of the fundraising activity.

Use of Friendship Community email lists for fundraising projects other than those that directly benefit Friendship Community is prohibited.

Other Team Members may be informed of a Team Member's outside fundraising activities as long as you do not use that as an opportunity to pressure peers or, especially, those persons that the Team member supervises. It is not appropriate to solicit or sell to Friendship Community Individuals.

### Soliciting and Receiving In-Kind Donations

This policy relates to all Friendship Community Employees, Individuals, homes, and programs.

In soliciting for and receiving in-kind donations, the goal is to follow the basic principles recorded in the fundraising activity guidelines of Friendship Community.

In-kind donations are defined as non-cash items received as gifts including: products, tickets, volunteer time, food, etc.

Every year Friendship Community receives many in-kind donations, both solicited and unsolicited. We are grateful for these contributions. It is important in the solicitation and reception of these contributions that Friendship Community maintains positive public relations. Therefore, we ask that homes, Team Members, and Individuals not solicit in-kind donations without prior communication with the Development Department. Communication should include:

- Identification of the needed item or product
- Identification of potential donor(s)
- Identification of the process of solicitation

Following initial communication, the Development Department shall choose to make the contact and encourage the home/program to follow through, or reevaluate the need. This process shall help to:

- Identify existing donors or available products.
- Alleviate the confusion of people approaching one business/donor for the same thing.
- Educate the community/donor about Friendship Community.

All in-kind donations, whether solicited or unsolicited, are to be reported to the Development Department.

All in-kind donations are to be properly acknowledged by both the direct recipient and the Development Department.

### Guidelines for Marketing Group Proposals

At times, Friendship Community is approached by individuals and groups who represent various marketing groups (e.g. Tupperware, Amway, Pampered Chef, etc.) that use home-parties and similar events to sell products.

The individual may wish to have Friendship Community host a party as a fundraiser, receiving some of the profits. It is our desire to decline these invitations. We feel it best to remain impartial. If we agree to one and refuse another, this could create hard feelings. The amount of money raised from these events is not likely to cover the cost that staff would incur (e.g., promotion, time, etc.).

Although we will not host these parties or involve Friendship Community as an organization in the various events that are offered, we will not discourage the person from pursuing a private fundraiser for Friendship Community if that is their desire.

Friendship Community shall not encourage the participation of these groups or demonstrators to have tables/booths at Friendship Community sponsored events, (i.e., Fest, yard sale, etc.).

### Flowers and Cards Policy

The Coordinator of Spiritual Nurture & Community Life is responsible for the following acts of kindness and goodwill to the constituency of Friendship Community.

Flowers are sent at these deaths:

- Individual
- Parent or family member of Individual
- Team Member & spouse
- Board member
- Significant volunteer (those who have met the volunteer criteria of hours per year or consistent service)

Accounts with: Royer's Flowers; Price range - \$30 - \$40

Cards (signed "Friendship Community") sent to:

- Individuals when a parent or care-giver dies
- Board Members when an immediate family member dies
- Immediate family members when an Individual dies

- Team Members when an immediate relative dies
- Waiting list parents
- Volunteers
- Donors
- Illness of a friend of Friendship Community
- It is the responsibility of homes and Team Members to inform the Coordinator of Spiritual Nurture of the deaths of Individuals and their family members in a timely fashion so that proper displays of sympathy can be expressed.

## Terminology

Group homes shall be called community homes or residential homes.

Guidelines for naming homes:

- Privately funded homes are named by:
  - Street names firstly
  - Cities/towns that are in or close to. A second home in the same city/town would be referred to by geographical direction or number (North, South, etc., I, II, III, etc.)
  - Developments in which they are located or near
  - Same name as the church/organization that helped to start them
  - The naming of homes is coordinated by the Development Office, however, the name options shall be reviewed by the CEO and approved by the Executive Team

Resident/Individual terminology:

- People living in Friendship Community programs shall primarily be referred to as Individuals. However, the term resident (when living in a residential home) or participant (when participating in a day program) can be used if it fits better grammatically.

## Mailing List Policy

Friendship Community shall not share or sell its mailing list to other organizations or businesses for the purpose of solicitation of funds.

Requests for the mailing list to be shared for educational purposes, i.e., a mailing for a disability conference, shall be reviewed on an individual basis by the Development Office, which shall then make a recommendation to the CEO for review and approval.

## Mission-Fit Projects & Exhibit/Event Policy

The decisions for whether a project or event is mission-fit at Friendship Community and Friendship Heart Gallery & Studio is motivated and informed by our values. The values held at Friendship Community create the acronym R.I.S.E, which stands for:

- Relationships – inspiring unity, respect and perspective;
- Integrity – Modeling authenticity, clarity and truth;
- Spirituality – Embracing the whole person to encourage living in balance with God, self and others;
- Excellence – Creating the extraordinary with passion and purpose

We need to also take into consideration our rich Anabaptist heritage and the conservative nature of our donor base when taking on projects, representing the Organization at events or exhibiting at certain businesses or spaces, which include but are not limited to:

- Production or distribution of hard alcoholic beverages where no food is being sold, marijuana, and tobacco products
- Military contracting and weapons production
- Gambling enterprises
- Pornographic establishments

Note: Team Members may attend events where alcohol is being served, however, while representing Friendship Community or Friendship Heart Gallery & Studio or Homebased Services, may not partake in alcoholic beverages.

Individual donations will be accepted without inquiry into personal lifestyle choices.

This is not an all-encompassing list and is to act as a guide to set forth the values of Friendship Community.

All new fundraising, exhibiting, and/or internal or external event attendance will be discussed with the Executive Team in advance. On occasion, the Board of Directors may be surveyed for their opinion where relevant expertise is needed.

## Gift Acceptance Policy

This policy provides guidelines for accepting various types of gifts in order to not only protect the interests of the donor, but also the interests of the Organization. This policy encourages donors who desire to make planned gifts to the Organization, to be in communication with the Director of Advancement who will inform the CEO and Board of Directors.

## General Guidelines

All gifts accepted are to be used to fulfill the Mission and Vision of Friendship Community.

Any gift, cash or non-cash, gifts in-kind and/or services shall be immediately reported to the Development Office, and when appropriate, receipted by the Development Office.

Right of Refusal: The Administration and Board of Directors of Friendship Community reserve the right to assess each gift on an individual basis and to accept, refuse, or modify any gift because it is restricted for a purpose which does not directly benefit the Organization's Mission and Vision, is difficult to assess the value, or is an undue burden to convert to cash.

Designated Planned Gift Allocations will be accepted and honored as designated as long as they align with the Friendship Community Mission, Vision and program priorities.

### ➤ Planned Gift Options

- Bequests through donor's will. Sample Language:
  - "I, \_\_\_\_\_ give and bequeath to Friendship Community, 1149 East Oregon Road, Lititz, PA 17543, a public charity of Pennsylvania, a \_\_\_ percentage of my estate (or \$ amount) for the general purposes of the Organization."
- Gift Annuity
  - Charitable Gift Annuities will be accepted and administered in partnership with the Mennonite Foundation, an affiliate of Everence. The gift annuity is a contract between the donor and Mennonite Foundation in which a fixed sum is paid to the donor or others for life (determined by age). A part of each income payment is considered tax-free and an immediate income tax deduction is available. Capital gains tax is possible. Mennonite Foundation will be responsible for managing the investment of the annuity and administering payments and tax-related reporting for the donor. Gift annuities will be accepted only when a 50% remainder is expected. Friendship Community will accept a \$10,000 as the minimum gift annuity amount, in accordance with the recommendation of Mennonite Foundation.
- Gifts of Life Insurance
  - An individual gives a prepaid insurance policy (whole life or term). Friendship Community is named as owner and beneficiary. Premiums paid are tax deductible, and proceeds received by Friendship Community are not included in the donor's estate for tax purposes.

- Charitable Trust
  - A gift can be made to a trustee (a bank, or Mennonite Foundation on behalf of Friendship Community, for example). The donor or donors and other beneficiaries receive income based on a variable payment (unitrust) or a fixed dollar basis (annuity trust). A charitable trust may also be established for a term of years. An immediate tax deduction is available and capital gains tax is avoided. Friendship Community will be named as the remainder beneficiary and will benefit at the death of the donor or named income beneficiary. Charitable trusts will be accepted at amounts that are in accordance with the minimum gift amount required by the partnering organization.
  
- Charitable Lead Trust
  - In the charitable lead trust, assets are transferred to a trustee for a period of years. During that time, the income is given to Friendship Community. At the end of the set period, the assets revert to the donor or some other named party. Friendship Community will partner with an outside organization for administration and management of the lead trust.
  
- Funding Options
  - Cash – Gifts of cash will be accepted in the form of a check made payable to Friendship Community or Friendship Ministries.
  - Pledges – Multi-year pledges will be accepted upon the receipt of a signed and dated pledge document that includes the total amount of the pledge and the anticipated payment schedule.
  - Securities – Publicly traded securities will be accepted with written endorsement on the stock certificate(s) or through wire transfer from the donor's brokerage account to the Mennonite Foundation brokerage account via the donor's donor-advised fund account. Securities will be valued by averaging the high and low prices on the day of transfer. Neither gains nor losses at the time of sale nor brokerage fees will alter the recorded value of the gift. It is the policy of Mennonite Foundation to sell the donated security as quickly as possible. Friendship Community may work with Mennonite Foundation, an affiliate of Everence, based on the level of complexity of the transaction.
  
- Gifts of Real Estate or Personal Property

Friendship Community will accept gifts of real estate and personal property on a case by case basis upon careful consideration by the Administration and Board of Directors. In all cases, the donor will be required to provide a recent, independent appraisal in writing. Expenses related to a real estate gift (such as appraisal fees, transfer tax, title search, etc.) are the responsibility of the donor.

In the case of real estate, the following will be required:

- Title Search
  - Name, address and phone number of any tenant or lessor
  - Details of the lease arrangement including a copy of the lease with the amount of the current rent
  - Status of any City/County code violations including all those within the previous 2 years to the present
  - Legal description including square footage of the property and any buildings.
  - Status of real estate taxes due and paid
  - Home inspection report including a list of all needed repairs performed by a certified home inspector
  - Environmental analysis as appropriate
  - Name, address and phone number of contractors, if work is in progress
- Gifts of real estate will be accepted only with reasonable assurance that Friendship Community will not be placed at risk of financial liability and public relations liability (such as a situation which requires the termination of a lease). Properties, which include a residence, will be very carefully evaluated for resale potential.

In addition, Friendship Community Administration and Board of Directors reserve the right to make a decision regarding whether a donated property will be liquidated or used for its intended purposes.

\*Friendship Community may consult with Mennonite Foundation, an affiliate of Everence, for assistance with processing any unusual assets.

## Social Media Policy

Social Networking: Friendship Community realizes that some Team Members participate in Social Media as a means to share their life experiences and thoughts with family, friends and colleagues. Social Media includes all means of communicating or posting information on the Internet, including Blogs, Personal Websites, or Chat Rooms whether or not associated or affiliated with Friendship Community, as well as any other form of electronic communication.

Social Media involves particular risks and requires Team Members to exercise certain responsibilities. Thus, it is important for Team Members to remember that any conduct that adversely affects the Team Member's job performance, the performance of colleagues or others who work on behalf of Friendship Community, such as suppliers, vendors, etc., may result in disciplinary action up to and including termination. Team Members are prohibited from engaging in Social Media during their shifts or work hours unless designated as an

Administrator posting business-related information. Team Members may engage in Social Media during appropriate breaks.

#### ❖ Social Networking Administrator

Since Social Media fits into the scope of Public Relations and Development, these designated Team Members, and other Team Members, as assigned, are permitted to utilize Social Media during work hours. However, social networking during work hours should only be related to the Friendship Community and Friendship Heart Gallery and not to personal social media accounts. Those Team Members should understand that they are posting on behalf of Friendship Community and must adhere to Friendship Community's overall Social Media Policy, Code of Conduct Policies, organizational values and applicable laws at all times.

When posting as a designated Administrator, it is required to verify with a Development Department Team Member to proof read the content for accuracy before it is shared. Posts should foster healthy interactions and build positive relationships. Administrators and designees shall be responsible for ensuring that the Friendship Community Social Media accounts are in compliance with the Social Networking Policy.

Administrators are also prohibited from using or disclosing any personal identifiable information about any Individual who has received or is currently receiving services from Friendship Community. If a comment contains information that identifies an Individual who has received services from Friendship Community and is sent by anyone other than that Individual, the posting author should edit the identifying information out of the post promptly or delete the post. Team Members shall not be permitted to take any of Friendship Community intellectual property with them should they leave the organization.

#### Social Media Account Ownership

- ❖ Team Members who have job responsibilities that include posting information to Friendship Community's maintained Websites and/or Social Media accounts understand (and agree) that the content and followers of the blog or other Website belong exclusively to Friendship Community. Also, upon request, the Team Member must provide Friendship Community with any information necessary to log into a Friendship Community's maintained Website or Social Media account. No employee may create an official Friendship Community account or change a password, as this is solely the responsibility of Friendship Community's Development Department or designee. Team Members must be mindful of the issue of copyright infringement when posting materials that may be owned by other persons/businesses.

- Personal Use (Not Related to Friendship Community Business)

- To assist Team Members in making responsible decisions about the use of Social Media,

Friendship Community established the following guidelines for the appropriate use of Social Media:

- ❖ If Friendship Community is the subject of Social Media content that a Team Member is creating, the Team Member must be clear about the fact that s/he is a Team Member/employee and her/his views do not represent those of Friendship Community (for example: "The views and comments stated herein are personal and do not reflect the views of my employer."). Friendship Community shall remind Team Members that work-related complaints are more likely to be resolved if the Team Member speaks directly with the conflicting party and Supervision or follow the procedures set forth in the Code of Conduct Policy.
- ❖ Team Members are prohibited from using statements, names, photographs, video or audio that could be reasonably viewed as malicious, obscene, threatening, intimidating and disparaging to Friendship Community Team Members and Individuals or that might constitute harassment or bullying. Examples of such conduct might include offensive posts meant to intentionally harm someone's reputation or posts that could contribute to a hostile work environment on the basis of race, sex, disability, religion or any other status protected by law or Friendship Community policy.
- ❖ Team Members are also prohibited from using or disclosing any personal identifiable information about an Individual who has received or currently receives services from Friendship Community.
- ❖ Team Members shall be responsible for ensuring that their personal Social Media accounts are in compliance with the Friendship Community Social Networking Policy. General Implementation of Policy This Social Media Policy is not to be applied or interpreted in a manner that interferes with any rights Team Members have under the National Labor Relations Act.

### Volunteer Policies and Procedures

- ❖ To volunteer one-on-one, a person must be 18 years of age or have pre-approval. For those volunteering one-on-one with an Individual on a regular basis, here are the requirements:
  - Submission of two personal references
  - A Criminal Record Check– If you have lived outside of PA within the past 2 years, a full FBI check is needed unless one has been completed within the last year.
  - A Statement of Medical Release Form signed by the Volunteer and family physician stating that they are free of communicable diseases

- A Review of Friendship Community's Privacy Policy and HIPAA Guidelines and sign the Confidentiality Agreement, signed by the applicant.
- A Review the Injury Reporting Policy
- A signed Submission of a Drivers Information Form.
- An Orientation with a Program Coordinator regarding specific needs of the Individual.

#### DRUGS AND ALCOHOL

- The following are prohibited:
- The use or possession of controlled substances without a valid prescription at any time
- Use or possession or being under the influence of alcohol during volunteer hours
- The misuse of any other medication or substance

#### WEAPONS POLICY

No weapons are permitted on Friendship Community property, including in vehicles on the parking lot, or in your possession during volunteering time away from Friendship Community. Weapons include any object which would typically be considered a weapon and other objects if they are used in a weapon-like manner.

#### HARASSMENT

- Harassment is prohibited. Friendship Community does not approve of and will not tolerate such conduct. Harassment includes verbal or physical conduct that condemns or ridicules someone because of the race, color, religion, gender, national origin, citizenship, age, or disability of that person or his or her friends, relatives, or associates. FC does not approve of, and will not tolerate such conduct. If you believe that such harassment exists, please contact the Volunteer Coordinator, Director of Human Resources, or the CEO. An investigation will be conducted promptly, and appropriate action will be taken to eliminate unacceptable conduct.

#### ABUSE AND PREVENTION

- Each FC Individual has the right to be free from physical, mental, verbal, and sexual abuse, corporal punishment, mistreatment, involuntary seclusion misappropriation of property and neglect. If you witness any occurrence of alleged abuse, it is your responsibility, mandated by law, to report it immediately to the Supervisor of the home or the HR Department. Call the Volunteer office directly at 717-656-2466 ext 1165 or the HR Director at 717-656-2466 ext 1102.

#### CONFIDENTIALITY

- HIPAA Guidelines for Volunteers

- HIPAA is a law stating the rights of Individuals to have their personal and medical information kept private. During your volunteer experience, you will gain knowledge and information, which is, and must remain, confidential.