



HEALTHCARE EXTENSION PROMOTION AND
TRAINING ORGANIZATION

GIFT ACCEPTANCE POLICY

1. Introduction

The purpose of this Gift Acceptance Policy is to provide guidance and establish procedures for the acceptance of charitable contributions by Healthcare Extension Promotion and Training Organization, Inc. (HEPTO) in a manner consistent with its mission, values, and legal obligations. This policy aims to ensure transparency, accountability, and ethical stewardship in all aspects of gift acceptance and management.

2. Scope

This policy applies to all individuals and entities, including but not limited to donors, prospective donors, volunteers, employees, board members, and fundraising professionals, involved in soliciting, accepting, or managing charitable gifts on behalf of HEPTO.



3. Policy Statement

HEPTO is committed to advancing its mission of promoting healthcare extension and training initiatives through collaboration, innovation, and excellence. As a nonprofit organization, HEPTO relies on the generosity and support of donors to fulfill its charitable objectives. The following principles guide the acceptance of gifts by HEPTO:

3.1 Compliance

All charitable contributions shall comply with applicable laws, regulations, and ethical standards governing philanthropic activities, including but not limited to Internal Revenue Service (IRS) regulations, state charitable solicitation laws, and industry best practices.

HEPTO shall not accept gifts that would compromise its independence, integrity, or ability to fulfill its mission, including gifts that are illegal, discriminatory, or inconsistent with its values and principles





3.2 Mission Alignment:



Gifts shall be evaluated based on their alignment with HEPTO's mission, goals, and priorities, as outlined in its strategic plan and programmatic objectives.

HEPTO reserves the right to decline or redirect gifts that are deemed to be inconsistent with its mission or that would require the organization to engage in activities outside of its core competency or strategic focus.



3.3 Financial Prudence



HEPTO shall exercise prudence and due diligence in assessing the financial implications and long-term sustainability of accepting gifts, taking into account the organization's financial position, operational capacity, and fundraising goals.

Gifts that entail significant financial risks, ongoing obligations, or administrative burdens may be subject to further review and approval by the Board of Directors or designated committee.



3.4 Transparency and Accountability



HEPTO shall maintain accurate records of all charitable contributions received, including donor information, gift amounts, purposes, and restrictions, in accordance with generally accepted accounting principles and fundraising standards.

Donors shall receive prompt acknowledgment and recognition of their contributions, along with information about how their gifts will be used to support HEPTO's mission and programs.



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3.5 Gift Acceptance Criteria

HEPTO may accept a variety of charitable contributions, including but not limited to cash, securities, real estate, tangible personal property, bequests, life insurance, and charitable trusts, subject to the following criteria:

- ① The gift is legal, ethical, and consistent with HEPTO's mission and values.
- ② The gift is offered voluntarily and without undue influence or expectation of quid pro quo.
- ③ The gift is free from restrictions or conditions that would impede HEPTO's ability to fulfill its charitable purposes, unless such restrictions are mutually agreed upon and compatible with HEPTO's mission and objectives.



3.6 Review and Approval Process

The acceptance of significant or complex gifts, including those with potential legal, tax, or financial implications, shall be subject to review and approval by the Executive Director, Board of Directors, or designated committee, as appropriate.

HEPTO may seek professional advice, including legal, financial, and tax counsel, to evaluate the acceptability and implications of certain gifts before making a decision.



4. Conflicts of Interest

Employees, board members, and other individuals associated with HEPTO shall disclose any actual or potential conflicts of interest related to the acceptance of gifts and refrain from engaging in activities that could compromise the organization's integrity or impartiality.

Any conflicts of interest shall be managed in accordance with HEPTO's Conflict of Interest Policy and applicable legal requirements.



5. Donor Recognition and Stewardship

HEPTO shall recognize and express gratitude to donors in a manner that is appropriate, meaningful, and consistent with their preferences and wishes.

Donor recognition may include public acknowledgment, naming opportunities, plaques, certificates, or other forms of acknowledgment as approved by HEPTO's leadership.

6. Review and Revision

This Gift Acceptance Policy shall be reviewed periodically and revised as necessary to reflect changes in laws, regulations, industry standards, and organizational needs. Amendments to the policy shall be approved by the Board of Directors or designated authority.



7. Document Management

This policy, along with any related procedures, guidelines, or forms, shall be maintained in a central repository accessible to all relevant stakeholders and shall be made available to donors, advisors, and other interested parties upon request.



8. Contact Information

For questions or concerns regarding this policy, donors and stakeholders may contact the Development Office or the Executive Director of HEPTO at contact@hepto.org.



9. Approval

This Gift Acceptance Policy has been approved by the Board of Directors of Healthcare Extension Promotion and Training Organization, Inc. (HEPTO) and shall be effective as of the date of approval.

Executive Director: Mohamed J. Mohamed Date

Signature: _____ Date: May 26, 2024