

MEMBER, PARTICIPANT, AND PRIVATE BENEFIT LIMITATION POLICY

Preserving Heritage. Building Opportunity. Organizing Community Engagement.

Policy Number	HOA-POL-015
Effective Date	Upon Board Adoption
Approved By	Board of Directors
Applies To	Directors, officers, committees, advisory members, volunteers, employees, contractors, partners, and program participants as applicable

Purpose

This Policy protects Heritage & Opportunity Alliance, Inc. from private inurement, improper private benefit, ownership confusion, and misuse of charitable assets.

Scope

This Policy applies to directors, officers, founders, members if any, advisory members, committee members, volunteers, employees, contractors, donors, sponsors, program participants, youth participants, partner organizations, businesses, and related parties.

No Ownership Interest

No director, officer, founder, member, advisory member, committee member, volunteer, employee, donor, sponsor, participant, youth participant, contractor, partner, or private person owns the corporation or has any ownership interest in its assets, income, grants, donations, sponsorships, programs, name, records, or goodwill.

No Private Inurement

No part of the net earnings of the corporation shall inure to the benefit of, or be distributable to, any private individual, director, officer, founder, employee, member, private shareholder, related party, partner organization, or private business.

The corporation may pay reasonable compensation, reimburse approved expenses, and provide charitable or educational program benefits when consistent with exempt purposes and organizational policy.

Program Benefits

Program benefits must serve charitable, educational, cultural, youth-development, health, housing-stability, workforce-development, economic-opportunity, or community-development purposes. Benefits shall not be used to reward insiders, buy influence, favor friends or relatives, or create improper private advantage.

Member and Participant Limits

If the corporation uses the term member, participant, advisor, committee member, volunteer, ambassador, partner, or chapter, such status does not create ownership, voting rights, employment rights, compensation rights, property rights, authority to bind the corporation, or entitlement to assets unless expressly provided in Board-approved governing documents and permitted by law.

Partner and Business Benefit

Private businesses, developers, contractors, artists, youth leagues, service providers, and partner organizations may benefit incidentally from charitable programs only when the primary purpose is charitable and community-serving. Any substantial private benefit must be avoided or reviewed by the Board.

Fairness and Documentation

Payments, referrals, program opportunities, vendor opportunities, sponsorship recognition, and public visibility involving insiders or related parties must be disclosed, documented, and reviewed under conflict-of-interest rules.

Heritage & Opportunity Alliance, Inc.

Records

The Secretary, Treasurer, or other Board-authorized records officer shall maintain records created under this Policy according to the Records Retention and Document Control Policy.

Records may include approvals, disclosures, invoices, receipts, reports, correspondence, minutes, incident reports, releases, agreements, restricted-fund logs, or other supporting documents.

Violations

Violations of this Policy may result in corrective action, reassignment, removal from a committee or volunteer role, termination of a contract, repayment, report to the Board, or other action permitted by law and organizational policy.

Retaliation against a person who raises a good-faith concern is prohibited.

Review and Amendment

This Policy may be reviewed at least annually and may be amended by the Board of Directors. The Board may adopt more detailed procedures, forms, checklists, and approval schedules consistent with this Policy.

Board Adoption

This Policy is adopted by the Board of Directors and remains in effect until amended, replaced, or rescinded by the Board.

Board Chair / President	Secretary
Name: _____	Name: _____
Signature: _____	Signature: _____
Date: _____	Date: _____