POLICY STATEMENT:
Presbyterian Village will solicit charitable gifts from individuals, foundations, corporations, businesses and organizations in a manner consistent with ethical fund raising practices, and which is consistent with the Donor Bill of Rights (attached).

Implementation:

SOLICITATION

1. Prior to initiation of solicitation, Presbyterian Village will comply with all applicable state laws regulating solicitation of charitable gifts by charitable organizations.

2. All solicitations will be conducted in a highly ethical manner and consistent with protecting the best interests of individuals considering gifts, Presbyterian Village and Presbyterian Village Foundation.

3. The following individuals may, from time-to-time, be solicited for contributions to Presbyterian Village:
   a. Independent living residents.
   b. Assisted living resident.
   c. Waiting list members.
   d. Family members of residents, excluding family members of residents of skilled nursing care facilities.
   e. Congregations.
   f. Members of congregations.
   g. Friends of Presbyterian Village.
   h. Business and vendors, providing the solicitation is consistent with all applicable corporate compliance procedures and policies.

4. Formal solicitations will not exceed two (2) per year. This does not preclude the regular promotion of memorial and honorific giving.

5. The CEO will approve all solicitation material.

REPRESENTATION

1. At no time may any employed or volunteer solicitor make any promise to a donor, expect favoritism from a donor, or agree to donor directed changes in the mission or operation of the organization as a result of a contribution.
2. At no time will any employee or volunteer solicit a gift from an individual who is in emotional or physical stress or who is deemed to be unable to make an independent gifting decision.

3. Presbyterian Village recognizes that even under the strain of loss of a loved one, a relative may wish to arrange a memorial tribute gift. Exceptional care must be exercised to ensure that no undue influence is used on such occasions.

4. Donor recognition and naming will be offered consistent with the Board approved procedure.

AUTHORIZED SIGNERS

1. All written solicitations will be signed either by the Chair or CEO.

2. All grant requests shall meet the format guidelines required by the individual funder. An officer of the corporation will sign applications, as they are contractual documents of the corporation.

**Donor Bill of Rights**

*Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:*

I. To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.

II. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.

III. To have access to the organization's most recent financial statements.

IV. To be assured their gifts will be used for the purposes for which they were given.

V. To receive appropriate acknowledgement and recognition.

VI. To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.

VII. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.

VIII. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
IX. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.

X. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

Developed by: American Association of Fund Raising Counsel (AAFRC); Association for Healthcare Philanthropy (AHP); Council for Advancement and Support of Education (CASE); National Society of Fund Raising Executives (NSFRE). Endorsed by (in formation): Independent Sector; National Catholic Development Conference (NCDC); National Committee on Planned Giving (NCPG); National Council for Resource Development (NCRD); United Way of America.