

Effective 04/1999

Last 11/2022

Approved

Next Review 11/2025



## Solicitation and Donor Privacy

### Solicitation

Any and all solicitations for funds or in-kind materials or services for Friendship Home must have prior approval from the Development Director. The purpose is to properly coordinate all fundraising efforts, to ensure compliance with United Way guidelines, and to avoid duplicate requests.

Solicitations of businesses and individuals will be made in accordance with ethical business and fundraising practices. Appeals to vendors and businesses with the potential for having a future commercial relationship with the agency will be made in the spirit of philanthropy with no overt or implied promise of future business or threat of withdrawal of business. Purchasing and development functions with Friendship Home will remain completely separate.

### Protection of Donor's Interest

No agreement shall be made between Friendship Home and any agency, person, company, or organization on any matter whether it be investment, management, sale or other interest that would knowingly jeopardize or compromise the donor's interest. The role of the Director of Strategic Partnerships, the Development Director and volunteers shall be to inform, serve, guide, or otherwise assist the donor in achieving fulfillment of her/his philanthropic purposes, and never, under any circumstances, to exercise undue pressure or methods of persuasion.

In keeping with this policy, Development staff shall be paid on a fixed salary and shall not receive a commission related to gifts received in such a way to create a personal financial interest in any agreement.

# Use of Legal Counsel

Friendship Home will seek the advice of legal counsel in all matters pertaining to planned gifts, and shall execute no agreement, contract, trust, or other legal document with any donor without the advice of legal counsel.

Likewise, the prospective donor shall be advised to seek the counsel of his/her attorney in any and all aspects of the proposed gift, whether by bequest, trust agreement, contract, or other. S/he shall particularly be advised to counsel his/her attorney on matters related to the income tax liability of a gift and matters related to planning her/his personal estate.

# Confidentiality of Donor Information

Friendship Home will not share or sell any information concerning a donor or prospective donor, including his/her name, contact information, the names of any beneficiaries, the amount of her/his gift, and the size of her/his estate. All such information shall be kept strictly confidential within the staff, fundraising volunteers, and Board Members of Friendship Home unless permission is obtained from the donor to release such information. An employee found to have violated this policy shall be subject to dismissal.

Friendship Home will not send mailings to donors on behalf of other organizations.

## Approval Signatures

Step Description	Approver	Date
Board Proxy	Stephanie Scheffler: Database/ Office Coordinator	12/2022
Finance Proxy	Amila Tanovic-Muslic: Finance Director	12/2022
Executive Director	Leah Droge: Executive Director	11/2022
Proofing & Formatting	Stephanie Scheffler: Database/ Office Coordinator	11/2022
	Dani Jurgens: Development Director	11/2022