



## ***The Samaritan Inn, Inc, Gift Policies***

1. It is the general policy of the Organization to seek gifts from a diversity of sources so that it does not become dependent on any one group. The organization will accept no funds from any source whatever – individual or family, church, government, foundation, or corporation – which in any way limits the accomplishment of the mission to which the organization is committed.
2. The Organization recognizes that donors may prefer, on occasion, to make gifts with restrictions which limit their use to special interests and desires on their part. It will be the policy of the organization to receive and administer such restricted gifts as specified by the donors, provided the purposes for which the gifts are made is in accord with the program of the organization, and the gifts do not make it necessary for the organization to alter its program to comply with the stipulations of the donors. The Executive Committee of the Board of Directors may request from donors clarification concerning the intended use of gifts and determine whether such gifts are appropriate for the organization to receive.
3. Should The Organization receive a gift and have questions or need clarification as to the intended use of the gift, the gift (check) may be held and not deposited until the donor's intent is clarified and all parties involved are in agreement concerning its use.
4. The Organization will make available to donors many opportunities for giving, including, but not necessarily limited to, outright gifts of cash, real or personal property, charitable trusts, Wills (bequests), annuities, life insurance, and life estate contracts. In all such gift transactions and agreements, the organization will hold fast to a policy of high integrity and openness in dealing with donors.
5. The Organization may make available "named" gift opportunities in which a particular fund, program, or project could be named in recognition and appreciation of the donor, or in honor of a person or entity of the donor's choosing, or in memory of a loved one. The Board of Directors and The City of Dallas make the final decisions about all aspects of these named gift situations.
6. No program, agreement, trust, contract, or commitment shall be urged upon any donor or prospective donor which would benefit the Organization at the expense of the donor's interest. No agreement will be made between The Organization and any other agency, person, company, or organization on investments, management, or other matters which would knowingly jeopardize the donor's interest. All potential donors of planned gifts to the organization will be advised to seek the counsel of their attorney, accountant, or other tax advisor on all aspects of a proposed gift, whether by bequest, trust agreement, contract, or other means. It shall be the policy of the organization to avoid the exercise of any high pressure sales techniques in dealing with prospective donors. It is the responsibility of all representatives of the organization, whether paid or volunteer personnel, to inform, service, guide or otherwise assist the



prospective donor in fulfilling his or her philanthropic wishes in accordance with sound financial planning practices.

7. Without further approval of the Board of Directors, any two of the following three persons, the President/CEO, the Chairman of the Board of Directors, and the Chief Financial Officer of The Organization are authorized to finalize life income contracts with any donor as long as such agreements conform with approved policy of the Board of Directors. All gifts of real estate must receive the prior approval of the Executive Committee of the Board of Directors.
8. Donor records are confidential and information is limited to "the need to know." Approval will be secured from major gift donors before public announcements of these gifts. The Organization will honor the request of donors to remain anonymous.
9. The Organization endorses the attached "Donor Bill of Rights" and requires that staff and volunteers abide by these guidelines as they relate to prospects and donors.
10. Should The Organization determine not to carry out a program for which a designated or restricted donation has been given, the donation must be returned to the donor unless the donor agrees for the gift to be used in another way. In some cases, designated or restricted gifts may be accounted for separately.