



Privacy Policy Notice to Donors

Assistance League of Ventura County and our affiliate organizations (Auxiliaries) Las Patronas, Nancy R. Brandt and Assisteens® greatly value your trust and confidence in us. We believe that our donors have the right to be fully informed about our record keeping practices and to be assured of our commitment to responsibly manage, use and protect their personal information.

Personal information, as used in this notice, means information that identifies an individual personally and is not otherwise available to the public.

Why and How We Collect Information

Personal information is collected for purposes of administering and advancing our philanthropic programs and enhancing the relationship we have with our donors and the community at large. As a matter of policy, we do not employ or contract with third party solicitation or marketing firms nor do we sell, trade or rent your personal information to non-affiliated individuals or organizations. Information collected may be used for one or more of the following purposes:

- To process, administer, maintain and acknowledge transactions and accounts relating to donations;
- To facilitate fundraising efforts supporting our philanthropies;
- To communicate with existing and prospective donors concerning Assistance League/ Auxiliaries' activities and services; or
- To comply with legal and regulatory requirements.

We may collect personal information about existing and potential donors in a number of ways, including the following:

- Personal information received directly from you;
- Personal communications with a donor by a Board member, member volunteer, or employee;
- Responses to advertising media, direct mail solicitation, invitations to fundraising, social and testimonial events;
- Receipt of information about memorial gifts, pledges and bequests; and
- Communications from tax, estate and investment planners.

Our Commitment to Confidentiality

We value and appreciate all donations supporting our philanthropies and we take great care to appropriately acknowledge your gifts upon notice or receipt. However, we do not publicly disclose the non-category amount or value of gifts unless authorized by you or as otherwise permitted or required by law.

Assistance League of Ventura County/Auxiliaries' promotional and solicitation materials include a copy of this notice or otherwise provide for the above authorizations. Pledged donations executed by bank, credit card or payroll deductions are considered one gift and are disclosed as initially authorized.



Privacy Notice to Members

Assistance League of Ventura County and our affiliate organizations (Auxiliaries) Las Patronas, Nancy R. Brandt and Assisteens® acknowledge our members as our most valued and trusted assets. We believe that our members have the right to be fully informed about our record keeping practices and to be assured of our commitment to responsibly manage, use and protect personal information.

General Statements

- Members, as used in this notice, include chapter members and auxiliary members.
- Personal information, as used in this notice, means information that identifies an individual personally and is not otherwise available to the public.
- Assistance League of Ventura County publications referred to in this notice shall include, but not be limited to the following: chapter's membership roster, newsletter, annual reports, brochures, fact sheets, promotional and fundraising materials and other communications viewed by the public.
- National Assistance League® publications referred to in this notice shall include, but not be limited to the following: *NewsLink*, annual report, website, brochure, fact sheet and video.

Why and How We Collect Information

Personal information is collected for purposes of administering and advancing our philanthropic programs and enhancing the relationship we have with our members, prospective members, beneficiaries, donors and the community at large. As a matter of policy, we do not employ or contract with third party solicitation or marketing firms nor do we share, sell, trade or rent your personal information to non-affiliated individuals or organizations.

Members' personal information may be used for, but not limited to one or more of the following purposes:

- Enriching your personal participation in the organization;
- Safeguarding your personal health and welfare;
- Advancing and facilitating fundraising efforts supporting our philanthropies;
- Communicating with members, prospective members and the community about Assistance League Auxiliaries' activities and services;
- Informing National Assistance League about membership status and chapter achievements;
- Processing, administering and acknowledging donations and contributions;
- Compliance with legal and regulatory requirements.

We collect personal information about members and prospective members in a number of ways, including the following:

- Personal information received directly from you;
- Personal communications with members by Board members, committee chairmen, members and employees;
- Responses to invitations to attend informational, fundraising, social and testimonial events.

**Assistance League of Ventura County
a chapter of National Assistance League®**

Website Privacy Policy

This website is operated by Assistance League of Ventura County. It is recognized that visitors to this site are concerned about the information provided and how that information is treated. The chapter cares about the privacy of its website visitors and therefore does not sell or otherwise make available personal identification information to any person or organization.

The chapter's website may contain "links" to other sites not affiliated with the chapter. Every effort is made to link to sites that share the same standards regarding your privacy. However, since Assistance League of Ventura County is not responsible for the privacy practices of such other sites, users are encouraged to be aware, when they leave this site, to read the privacy statements of each and every website that they visit. The information contained in the privacy policy statement of Assistance League of Ventura County is for the website of the chapter only.

This website and the website of National Assistance League contain trademarks, service marks, graphics and text that are the property of Assistance League of Ventura County and/or National Assistance League. These properties may not be copied, reproduced, republished, uploaded, posted, transmitted or distributed without the prior written consent of Assistance League of Ventura County or National Assistance League. Except as expressly provided above, nothing contained herein shall be construed as conferring any license or right under any copyright or other intellectual property right. Further information on the rules for trademark usage can be found at www.assistanceleague.org.

We maintain records of all contributions to Assistance League of Ventura County. Authorized members of the chapter may contact you to obtain additional information. This may be done through electronic or telephonic means, or through postal mail. You may choose to opt out from or restrict the use of your contact information by contacting Assistance League through one of the methods below. Donor names and addresses shall not be shared, unless required by law, or sold to outside organizations, and such policy shall be disclosed to donors. Unless requested not to do so by the donor, the chapter may list the donor's name and donation category in publications of the chapter. This information may be contained in documents including, but not limited to annual reports, press releases, grant applications and newsletters. Donors may contact the chapter to view copies of annual reports, IRS (Form 990) or other financial documents prior to making their donation. Donors may also ask for examples of prior publications showing the manner in which donor contributions are acknowledged.

This Privacy Policy was last updated on September 4, 2008.

Assistance League® of Ventura County

FINANCE POLICY

1. National Assistance League® and chapter finance policies shall be reviewed at the May Board meeting.
2. At the April Board meeting, Treasurer shall recommend designation of net assets sufficient to cover one year's operating expense for the following fiscal year
3. All accounts at financial institutions shall be titled in the name of the corporation. The Board shall approve the authorized signers on all accounts annually.
4. Any two of the following elected officers of the corporation shall sign checks in the name of the corporation: President, Treasurer, First Vice President and Recording Secretary.
5. All transactions shall be entered into the chapter computer accounting system.
6. Original Letters of Incorporation, IRS 501(c) 3 letter, Welfare Exemption Letter, State Exemption Letter, Federal Identification Letter and other pertinent legal documents shall be maintained in the chapter Safe Deposit Box.
7. Annual consolidated budget shall be approved by the Board of Directors and approved by the membership prior to the beginning of the fiscal year.
8. The Treasurer shall oversee chapter reserve accounts. The Board shall approve any changes in the accounts.
9. The Investment Committee shall oversee the investment portfolios. The Board must approve any changes in the Investment Policy and compensation for investment specialists.
10. The corporation shall not act as a fundraising agent for individuals or other organizations.
11. Financial commitments and/or contracts shall be submitted to the Board for approval and signature of the President and Recording Secretary, as the corporation is responsible for all debts.
12. The chapter shall not be responsible for any unauthorized expense incurred by any member or employee.

Assistance League of Ventura County

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- 7 Annual consolidated budget shall be approved by the Board of Directors and approved by the membership prior to the beginning of the fiscal year.
- 8 The Treasurer shall oversee chapter reserve accounts. The Finance Committee shall approve any changes in the accounts
- 9 The Investment Committee shall oversee the investment portfolios. The Board must approve any changes in portfolio management.
- 10 The corporation shall not act as a fundraising agent for individuals or other organizations
- 11 Financial commitments and/or contracts shall be submitted to the Board for approval and signature of the President and Recording Secretary, as the corporation is responsible for all debts
- 12 The chapter shall not be responsible for any unauthorized expense incurred by any member or employee
- 13 Proposed unbudgeted funds of less than \$1,000 shall be presented to the Board for approval
- 14 Proposed expenditures of unbudgeted funds in excess of \$1,000 shall have Finance Committee recommendation prior to presentation for Board and membership approval
- 15 The corporation shall file IRS Form 990 and all other required state and federal tax returns
- 16 All tradesmen with whom the corporation contracts must provide certificates of acceptable liability insurance and if they hire additional employees workers' compensation certificates are also required

January, 2011
Reviewed May, 2014

**Assistance League® of Ventura County
FUNDRAISING POLICIES**

1. Fundraising activities shall be approved and evaluated annually by the membership.
2. All dates for fundraising events or activities shall be approved by the Board.
3. All printed fundraising materials shall be approved by the chapter Public Relations Committee.
4. Each fundraising event and activity conducted for the benefit of the philanthropic programs shall realize a surplus of at least sixty percent (60%) of total receipts.
5. The chapter shall spend no more than 35% of total support and revenue, excluding program service revenue and investment income, on fundraising expenses.
6. Tickets and/or invitations for all fundraising events shall show the amount of the ticket, fair market value and description of goods and services received, if applicable; and the amount that is tax deductible. Complimentary tickets shall be approved by the Board.
7. The chapter shall provide donors with receipts/acknowledgements for all cash and non-cash contributions and obtain valuations of gift-in-kind donations as outlined in IRS Requirements for Donor Documentation and Sample Acknowledgement Letters.
8. The corporation shall not act as a fundraising agent for individuals or other organizations or make financial contributions to other organizations or agencies.
9. Donor names and addresses shall not be shared or sold to outside organizations unless required to be disclosed by law.
10. Contributions received with donor-imposed restrictions shall be used only for that purpose.
11. In order to maintain the nonprofit 501(c.)(3.) IRS classification, all fundraising activities will ensure that the public is offered the same opportunities as our chapter members. Strict enforcement of self-dealing policies shall be followed.
12. The corporation shall have a donor privacy policy in place which sets forth the duties and obligations of ALVC with respect to contributions of a donor.