

True Worth Place POLICY/PROCEDURE

SUBJECT: Privacy and Confidentiality of Donor Information

Policy Statement:

Donor information will be kept confidential except in the event of donor recognition and only with the express permission of the donor. True Worth Place will not sell or share a donor's personal information to third-parties except as required by law.

Definition of donor information:

Donor information is defined as the name, any address, telephone number, gift history, or any other information pertaining to a donor or potential donor to the True Worth Place, which is gathered by the development office or representatives of the True Worth Place for development purposes.

Procedures:

Donor information is collected from contribution envelopes, checks, credit cards, in-kind gift receipts and a variety of other verbal and written sources. This information is kept confidential, with the following exceptions:

- Donor recognition statements in newsletters, annual reports and other agency publications, unless the donor requests anonymity.
- Public recognition, such as event invitations, event advertising, and related materials, unless the donor requests anonymity.
- Any time the donor requests ALL information to be kept confidential. In the event that all information is requested to be kept confidential, the word "anonymous" will appear in all publications in place of the donor name. The donor name will be shared only with the Development Director, Executive Director and Chair of the Board of Directors.

Donor information may be accessed and shared only by True Worth Place employees and board members who are authorized and who have a need to know in order to perform an authorized agency function or activity. Donor information shall be used solely for development purposes in accordance with applicable policies.

Donor information is not sold, shared or disclosed to third party organizations.

Third-party credit card processing organizations are not permitted to retain, share, store or sell donor information.

Failure to comply with this policy may result in denial of future access to donor information and disciplinary action up to and including termination of employment.

Created on: 8/3/2007

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Status of Policy: FINAL

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