

Confidentiality and Maintenance of Donor Records

Regulation(s)/Standards:	Revision Date(s): May 2011 June 2017 (revised/reformatted)
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PURPOSE: Benevilla recognizes that the efficient operation of our agency requires the maintenance and management of extensive donor and prospect records. These records may contain sensitive information that must be shared with staff or volunteers on a confidential basis. (Records are construed to mean all files – including electronic data). Protecting donor confidentiality is an essential part of providing good service to donors.

POLICY: Confidential information about constituents (donors and non-donors), as well as confidential information in oral form or on electronic, magnetic or print media are protected in order to foster a trusting relationship between the constituent and Benevilla. All persons accessing donor/prospect or fund records in the conduct of Benevilla business shall maintain the confidentiality of said records.

PROCEDURE:

1) Confidentiality

- a) The President/CEO and Vice President of Fund Development shall be responsible for maintaining the confidentiality of donor and prospect records, as well as fund information.
- b) Donor information should be private and confidential and will not be made public.
- c) Confidential information about constituents (donors and non-donors), as well as confidential information in oral form or on electronic or print media are protected in order to foster a trusting relationship between the constituent and Benevilla. This means that information is not available for anyone except the CEO, development team and Executive Board to see.
- d) A Code of Confidentiality must be signed.

2) Access to Donor Database

- a) The collection of information should be done lawfully, respecting applicable laws and Benevilla’s policies.
- b) All persons accessing donor/prospect or fund records in the conduct of Benevilla business shall maintain the confidentiality of said records. This applies to agency endowment funds as well as to other types of funds. Staff may share information with donors, beneficiaries and grantees pertaining to their own gifts, funds, grants.

3) Publication of Donor Names

- a) Unless otherwise requested by the donor, the names of individual donors may be printed in Benevilla’s Annual Report and Benevilla Newsletters.
- b) Benevilla will not publish the amount of any donor’s gift without permission of the donor.

Confidentiality and Maintenance of Donor Records**4) No Disclosure to Third Parties**

- a) Benevilla shall not release to third parties or allow third parties to copy inspect or otherwise see Benevilla records or other information pertaining to the identification of a donor or donor's gifts.
- b) No disclosures to third parties, including addresses and demographic information, shall be made without the donor's consent.

5) Confidential Information – Confidential information about donors, clients, their Families and friends will not be discussed for any reason except on a need-to-know basis.

Violations of any part of the Confidentiality Policy are considered very serious, and may result in disciplinary action, up to and including dismissal.