

RESULTS/RESULTS Educational Fund

Donor Confidentiality Policy

Adopted by Board on November 26, 2013

I. Purpose

The purpose of this policy is to protect the interests of and personal information provided by donors to RESULTS and RESULTS Educational Fund ("RESULTS/REF"), and to guide authorized staff, board members, and volunteers in safeguarding this information.

II. Policy

Donor information includes:

- individual and family names;
- contact information such as addresses, telephone numbers, fax numbers, and email addresses;
- employment information such as company names and positions held;
- demographic information such as education, political affiliation, memberships, relationships, and interests;
- giving information such as dates and amounts of requests and gifts, and payment details; and
- participation information such as attendance at events and volunteer service.

This information is confidential and is entrusted to the Development department. Donor information will only be disclosed to the Executive Director, the Accounting department, and authorized volunteers, and then only to the extent the information is necessary to their assigned duties.

- A. Donor information is maintained in electronic and/or physical files.

- B. Physical files are locked and only Development department and Accounting department staff and the Executive Director are permitted access.
- C. Electronic files are housed on a secure server and password-protected. Access is restricted to the Development department and Accounting department staff and the Executive Director. Donor information may only be entered, modified, or exported by Development department staff.
- D. The Executive Director may authorize members of the Board of Directors and other volunteers to receive donor information to the extent it is necessary to their assigned duties.
- E. Volunteers will return all donor information at the completion of their assigned duties and destroy any paper, electronic, or other records received so they are no longer accessible.
- F. Donors requesting anonymity will be acknowledged in all published material as "Anonymous" and the request will be documented prominently in all physical and electronic files.
- G. All requests for donor information outside of RESULTS/REF's authorized staff, board members, and volunteers, or for purposes beyond the scope of official duties, will be denied, except where required by law.
- H. RESULTS/REF will not sell, lease, or trade donor information to any other organization.