

# **Donor Confidentiality Policy and Bill of Rights**

**Adopted by the Board of Directors, October 2009**

Interfaith Caregivers of Polk County subscribes to the Donor Bill of Rights of the Association of Fundraising Professionals and does not, therefore, share, loan, trade, rent or sell our donor list to any other non-affiliated organization. The information we collect is used only to communicate with our donors or potential donors and to evaluate our giving program.



*A Neighbor's  
Independence  
Depends On You*

We remove from our mailing and contact lists the names of anyone who request it. If donors or others wish to be removed, they notify Interfaith Caregivers of Polk County by calling 715-485-9500 or by e-mail at [interfaithcare@centurytel.net](mailto:interfaithcare@centurytel.net).

**FAITH  
IN ACTION**

## ***Confidentiality of Donor Records***

The Program Director shall be responsible for maintaining the confidentiality of donor and prospect records and will ensure that all staff and volunteers have clear direction regarding the confidentiality of records through the establishment of appropriate operating procedures. He/she may, in his/her discretion, make all or part of any record available to staff members or volunteers if essential to them in executing their responsibilities. Disclosure decisions will honor the wishes of donors related to disclosure unless a larger legal issue is related.

To carry out its responsibilities, the Board of Directors, staff and volunteers may need to review donor/prospect records. All directors and staff shall respect the Interfaith Caregivers' significant interest in protecting the sensitive nature of those records and shall maintain these policies for donor confidentiality.

The Interfaith Caregivers' auditors are authorized to review donor and prospect records as required for the purposes for which they are engaged.

## ***Publication of Donor Names***

The names of all individual donors will be listed in the Interfaith Caregivers' newsletters and/or in similar public relations communications. Exceptions will be made for any donor who specifically requests anonymity.

The Interfaith Caregivers will not publish the specific amount of any donor's gift without the permission of the donor. Donors making gifts to the Interfaith Caregivers by bequest or other testamentary device are deemed to have granted such permission.

## ***Honor/Memorial Gifts***

The names of donors of memorial or honor gifts may be released to the honoree, next of kin, or appropriate member of the immediate family, unless otherwise specified by the donor.

Gift amounts are not to be released without express consent of the donor.

## *Anonymous Gifts*

The Program Director is authorized to accept anonymous gifts to the Interfaith Caregivers. In the event the Program Director is uncertain about the desirability of accepting an anonymous gift, he/she shall consult with the Executive Committee.

The Program Director shall disclose to the Executive Committee, upon a request by a majority of the Executive Committee, the names of any anonymous donors.

## **The Donor Bill of Rights**

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the nonprofit organizations and causes they are asked to support, we declare that all donors have these rights:

- I. To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
- II. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
- III. To have access to the organization's most recent financial statements.
- IV. To be assured their gifts will be used for the purposes for which they were given.
- V. To receive appropriate acknowledgement and recognition.
- VI. To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.
- VII. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
- VIII. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
- IX. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share. (**Interfaith Caregivers does not share mailing lists with individuals' names.**)
- X. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

*The Donor Bill of Rights was created by the Association of Fundraising Professionals (AFP), the Association for Healthcare Philanthropy (AHP), the Council for Advancement and Support of Education (CASE), and the Giving Institute: Leading Consultants to Non-Profits. It has been endorsed by numerous organizations.*