

TITLE: Donor Privacy Policy

PURPOSE

Little Brothers – Friends of the Elderly (LBFE) is committed to respecting the privacy of donors.

PROCEDURES

1. The types of donor information that LBFE collects and maintains are as follows:
 - a. Contact information: name address, telephone number, email address, etc.
 - b. Giving information
 - c. Information on events attended, publications received and special requests for program information
 - d. Research on major donors: education, work history, interest areas for giving, etc.
 - e. Information provided by the donor in the form of comments and suggestions
 - f. Record of contacts and interactions
2. LBFE uses donors’ information to understand their interests in its mission and to update them on the organization’s plans and activities. It is shared with staff, board members, volunteers, interns and consultants only on a “need-to-know” basis.
3. The organization also assures donors that their names and addresses will not be shared with or sold to any third party unless permission has been granted.
4. Anyone with comments or questions about LBFE’s donor privacy policy may speak with the Executive Director or the Development Director.
5. LBFE abides to the AFP *Code of Ethical Principles and Standards of Professional Practice* and a *Donor Bill of Rights* (Copies are part of this policy and can be found following the policy document).
6. Staff, board members, volunteers and interns involved in fundraising often are privy to personal information about a donor’s giving history, family, wealth and assets. They must understand it is vital to donors and the organization that they keep this information confidential. Persons who have access to this type of information will sign a confidentiality policy agreement. Violation of such a policy would be grounds for discipline and/or removal of the offending people from their positions with the organization.

DOCUMENTATION GUIDELINES

- Attached is confidentiality policy agreement to be signed by persons with access to donor information. Signed agreements will be kept in the Development office.

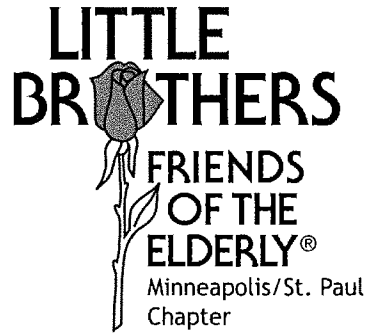
Adopted by majority of the board of directors of the Little Brothers-Friends of the Elderly on April 16, 2015.

Nick Keller
Signature

Nick Keller
Print Name

President
Title

4/16/15
Date



Confidentiality Policy Agreement

In performing their duties, Little Brothers – Friends of the Elderly staff, board members, volunteers and interns involved in fundraising or development activities for the organization are privy to information about individuals and families, companies and other funders, such as giving history, assets, wealth and family relationships. Due to the sensitivity of this information, it is important that all these persons adhere to the organization’s donor privacy policy that information shared with them remains confidential, is not discussed with others in private or public settings and is not disclosed or used for any other purposes.

By signing, I am indicating I agree to comply with this policy. Violation will be grounds for discipline and/or removal from position/role.

Signature

Date



CODE OF ETHICAL STANDARDS

ETHICAL STANDARDS (Adopted 1964; amended Oct 2014)

The Association of Fundraising Professionals believes that ethical behavior fosters the development and growth of fundraising professionals and the fundraising profession and enhances philanthropy and volunteerism. AFP Members recognize their responsibility to ethically generate or support ethical generation of philanthropic support. Violation of the standards may subject the member to disciplinary sanctions as provided in the AFP Ethics Enforcement Procedures. AFP members, both individual and business, agree to abide (and ensure, to the best of their ability, that all members of their staff abide) by the AFP standards.

PUBLIC TRUST, TRANSPARENCY & CONFLICTS OF INTEREST

Members shall:

- 1 not engage in activities that harm the members' organizations, clients or profession or knowingly bring the profession into disrepute.
- 2 not engage in activities that conflict with their fiduciary, ethical and legal obligations to their organizations, clients or profession.
- 3 effectively disclose all potential and actual conflicts of interest; such disclosure does not preclude or imply ethical impropriety.
- 4 not exploit any relationship with a donor, prospect, volunteer, client or employee for the benefit of the members or the members' organizations.
- 5 comply with all applicable local, state, provincial and federal civil and criminal laws.
- 6 recognize their individual boundaries of professional competence.
- 7 present and supply products and/or services honestly and without misrepresentation.
- 8 establish the nature and purpose of any contractual relationship at the outset and be responsive and available to parties before, during and after any sale of materials and/or services.
- 9 never knowingly infringe the intellectual property rights of other parties.
- 10 protect the confidentiality of all privileged information relating to the provider/client relationships.
- 11 never disparage competitors untruthfully.

SOLICITATION & STEWARDSHIP OF PHILANTHROPIC FUNDS

Members shall:

- 12 ensure that all solicitation and communication materials are accurate and correctly reflect their organization's mission and use of solicited funds.
- 13 ensure that donors receive informed, accurate and ethical advice about the value and tax implications of contributions.

- 14 ensure that contributions are used in accordance with donors' intentions.
- 15 ensure proper stewardship of all revenue sources, including timely reports on the use and management of such funds.
- 16 obtain explicit consent by donors before altering the conditions of financial transactions.

TREATMENT OF CONFIDENTIAL & PROPRIETARY INFORMATION

Members shall:

- 17 not disclose privileged or confidential information to unauthorized parties.
- 18 adhere to the principle that all donor and prospect information created by, or on behalf of, an organization or a client is the property of that organization or client.
- 19 give donors and clients the opportunity to have their names removed from lists that are sold to, rented to or exchanged with other organizations.
- 20 when stating fundraising results, use accurate and consistent accounting methods that conform to the relevant guidelines adopted by the appropriate authority.

COMPENSATION, BONUSES & FINDER'S FEES

Members shall:

- 21 not accept compensation or enter into a contract that is based on a percentage of contributions; nor shall members accept finder's fees or contingent fees.
- 22 be permitted to accept performance-based compensation, such as bonuses, only if such bonuses are in accord with prevailing practices within the members' own organizations and are not based on a percentage of contributions.
- 23 neither offer nor accept payments or special considerations for the purpose of influencing the selection of products or services.
- 24 not pay finder's fees, commissions or percentage compensation based on contributions.
- 25 meet the legal requirements for the disbursement of funds if they receive funds on behalf of a donor or client.

A DONOR BILL OF RIGHTS

DEVELOPED BY:



Association of Fundraising Professionals (AFP)



Association for Healthcare Philanthropy (AHP)



Council for Advancement and Support of Education (CASE)



Giving Institute: Leading Consultants to Non-Profits

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 assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit 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 donations 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.

X

To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.