



DONOR PRIVACY POLICY

CONFIDENTIALITY IN DEVELOPMENT AND MANAGEMENT OF PERSONAL DONOR INFORMATION

The Development Department at Habitat for Humanity of Evansville (hereafter referred to as HFHE) recognizes that efficient advancement operations require the maintenance and management of extensive donor and prospect records. Donor records on the computer, voicemails, emails, or hard copy files contain sensitive information that is shared with or developed by the Development Department on a confidential basis.

Employee Responsibility for Confidentiality

Employees have an ethical obligation to respect the privacy of our donors, and to protect and maintain the confidentiality of all information about donors, their family members and friends. Donor records are protected confidential records and should not be discussed with or disclosed to anyone except: co-workers who are specifically authorized to have access to such information, any person authorized by the donor to obtain information about the donor, or any person with whom the division has authorized the sharing of the information. Work performed, conversations heard, printed materials read, contact with any contents of HFHE's administrative database and use of public record search utilities owned or subscribed to by HFHE are confidential.

It is unethical and a violation of Development policy to discuss donor matters with friends, spouses, relatives, or anyone else, except those persons listed above, unless ordered to do so by a court or otherwise required to do so by law. Violations of this Confidentiality Policy are considered very serious, and may result in disciplinary action, up to and including dismissal for employees.

Each employee, temporary employee, volunteer, or work/study student shall sign a statement, affirming that such person:

- a. Has received a copy of the confidentiality policy,
- b. Has read and understands the policy, and
- c. Has agreed to comply with the policy.

A sample of this agreement is located at the end of this document.

Management of Personal Donor Information and Donor Data

Donor data is the lifeblood of any effective development program. Donors entrust personal and financial information to an organization because they believe in its mission, understand the need for said information to be maintained, and trust the organization's ability to be a good steward with data. As such, the following procedures will be implemented by HFHE in order to manage donor data:

1. **Data Storage:** Donor data will be stored on a workstation and/or server that possess appropriate and updated virus protection software, firewall application, and other security measures deemed necessary to limit unauthorized external access to data and potential tampering with data.
2. **Data Entry:** New donor entries will be established according to the protocol adopted for donor data entry. Updates to donor data will be entered into the database only by employees who have been trained to access, update, and manage the database. List codes, affiliation codes, and donation codes will be established and approved by the Director of Development prior to the commencement of data entry and/or updates.
3. **Use and Distribution of Donor Data:** Donor data collected and maintained by HFHE may be used to contact donors to inform, involve, and excite them about activities and programs in progress. Donor data may also be used to exemplify development program progress to boards and committees, and to prepare invitation/ mailing lists for events and opportunities that benefit HFHE. Donor data reports and mailing lists will be originated by the Development Department and may only be used by the Development Department or its assigns, even for mailings, projects and events that are staged by external entities on behalf of HFHE. Under no circumstance will a donor's personal information be shared, sold or traded with an external entity, and HFHE will not send mailings on behalf of other organizations.
4. **Monitoring:** The donor database will be periodically updated and purged to ensure that donor data is accurate and timely. The Development Department will periodically review the efficacy of the donor database, software and hardware associated with its maintenance, and make changes or modifications as needed.

Confidentiality Agreement Form

By signing below, I acknowledge that:

- a. I have received a copy of the HFHE Confidentiality Policy
- b. I have read and understand the policy and
- c. I agree to abide by this policy to the best of my ability in my role as an employee, temporary employee, volunteer, or work/study student.

I further agree that all confidential information and/or grant files, contribution files, donor records, donor lists, charitable gift information, development data, manuals, letters, contracts, agreements, notes, records, reports, memoranda and all other organizational materials, documents and data used, prepared or collected as part of my work with HFHE, in whatever form, are and will remain the property of HFHE.

I will not duplicate any work-related document or electronic record for my own use without the permission of the appropriate supervisor/administrator. I will not retrieve, examine or alter any work-related document, file or electronic record except where I am authorized to as part of my work responsibilities.

If I am unsure whether or not a particular fact, matter, document, file or electronic record is covered by this confidentiality agreement, I will preserve confidentiality of the item in question until receiving clarification from the appropriate supervisor/administrator. Accordingly, I agree that at the end of my relationship with HFHE, I will destroy or return to HFHE all documents and other materials of any kind which constitute or contain any confidential information, in my possession or control, regardless of how stored or maintained, including all originals, copies and compilations and all information stored or maintained on computer, tapes, discs, E-mail or any other form of technology.

Employee signature: _____ Date: _____

Printed name: _____

Supervisor signature: _____ Date: _____

Printed name: _____

The Development Department is committed to ensuring the privacy of the Habitat for Humanity of Evansville constituency, board members, donors, and prospective donors.