



Policy/Procedure: Donor Privacy and Discontinuing Contact

Issuing Department: Resource Development

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Approver Signature: 

Approval Date: April 11, 2024

1. Policy Overview:

CommonBond Communities, particularly Resource Development, collects a variety of personal information about donors, volunteers, board and committee members, and other partners as relevant to fundraising and engagement purposes. The purpose of this policy is to ensure that donor privacy is respected and maintained, and that any requests to discontinue contact, or change the method of contact, are documented and followed.

2. Detailed Policy Statement:

CommonBond is committed to respecting the privacy of donors and keeps donor information confidential as detailed in the Association of Fundraising Professionals' *Code of Ethical Standards* and *A Donor Bill of Rights*.

Resource Development collects and maintains the following types of information about donors, volunteers, board and committee members, and other partners ("supporters") as applicable and appropriate:

- Contact information such as name, address, telephone number and email address
- Giving information
- Information on events attended, publications received, and special requests for program information
- Information provided by the supporter in the form of comments and suggestions
- Notes from meetings or conversations with supporters or prospective supporters



This information is considered confidential and is kept on file for IRS purposes. It is also used to analyze overall giving patterns in order to make more accurate budget projections, as well as to understand supporters' interests in our mission and to update them on the organization's plans and activities. This information is shared with staff, board and committee members, and consultants only on a confidential and need-to-know basis.

CommonBond will not sell, trade, or share our donors' personal or contact information with any other organization. Use of donor information will be limited to the internal purposes of the organization and only to further the mission of CommonBond.

CommonBond will discontinue or change the method used to contact any person upon that person's oral or written request within five business days. Resource Development will maintain a record of all requests by persons who indicate that they do not wish to be contacted by or on behalf of CommonBond Communities. Preferences will be noted in the supporter's Raiser's Edge record.

- 3. Applicability:** The Donor Privacy and Discontinuing Contact Policy and Procedure applies to all supporters and prospective supporters of CommonBond.

Any requests can be made to the Database Administrator or another member of the Resource Development team.

- 4. Procedure:**

All members of staff, volunteers, board and committee members involved in fundraising are informed of the Donor Privacy Policy at least once per year.

Upon a person's request that CommonBond discontinue further contact, the person's name and address will be promptly modified in CommonBond's donor database, Raiser's Edge, to ensure that no formal organizational contact is made with the person.

In rare cases, a supporter or prospective supporter will still receive a mailing or communication if the piece has already been sent to an external mail house. However, every attempt will be made to honor the wishes of the supporter as soon as possible.

Resource Development will maintain a record of all requests to change or discontinue contact within the donor database. Resource Development staff will enter oral requests and upload written requests into the database. CommonBond will maintain these records to the extent necessary for legal or liability purposes in accordance with our record retention policy. If a request is made to delete a record, we will remove contact information but keep the record in place (so that we can note not to contact the donor).



5. Related Policies & References:

Gift Acceptance and Solicitation Policy (Resource Development)

Association of Fundraising Professionals' *Code of Ethical Standards* and *A Donor Bill of Rights* (attached)

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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.



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.