



DONOR CONFIDENTIALITY POLICY & DONOR BILL OF RIGHTS

DONOR CONFIDENTIALITY POLICY

Greater Tacoma Community Foundation recognizes that the maintenance and management of extensive donor and prospect records is essential to organizational excellence and operational efficiency. These records may contain sensitive information that has been shared with or developed by Community Foundation staff or volunteers on a confidential basis. ("Records" includes all files, including electronic data, containing information on donors or prospective donors to the Community Foundation).

Protecting donor confidentiality is an essential part of providing good service to donors. Many donors and prospects choose to work with the Community Foundation on the basis of its ability to assure temporary or permanent anonymity. The Community Foundation takes care to preserve the confidentiality of records and information shared in the course of conducting Community Foundation business.

The purpose of this policy is to document the Community Foundation's confidentiality position.

1. **Confidentiality of Community Foundation Business:** Discussions that take place in the context of the Community Foundation's operations require discretion, including discussions pertaining to grantmaking, personnel issues, development activities, operational fundraising, investment management, etc. The positions or statements of individual board members, volunteers, or staff should not be discussed outside of official Community Foundation meetings and processes. Likewise, the content of Community Foundation business, including documents or Community Foundation analysis of documents, should not be discussed or shared outside official meetings and processes.
2. **Confidentiality of Records:** The President & CEO shall be responsible for maintaining the confidentiality of donor and prospect records, as well as fund information. Access to donor information is strictly limited to Community Foundation staff who need information to fulfill their duties. The President & CEO may allow third parties to access information in very limited situations under strict guidelines. These situations include:
 - a. *Board and Committee Members.* Board members and committee members may be given information on the names of donors, donor history and the amount of gifts if needed to fulfill their responsibilities as directors and volunteers of the organization. All board members, committee members and staff are required to maintain the confidentiality of donor information and signify their understanding of this requirement by signing a confidentiality statement every fiscal year.
 - b. *Fund Representatives.* Only Fund Representatives are authorized to receive fund statements or information concerning activities of the fund. This may include the names of donors and the gift amount unless the donor requests anonymity. In limited situations, the VP of Philanthropy may approve a request from the Fund Representative to access additional donor information. Fund

Representatives who are granted additional information will only receive information pertaining to their fund.

- c. *Memorial/Tribute Gifts.* The names and addresses of donors of memorial or tribute gifts may be released to the honoree, next of kin, or appropriate member of the immediate family for the sole purpose of thanking donors, unless anonymity is requested by the donor. Gift amounts are not to be released without the express consent of the donor.
 - d. *Auditors.* The Community Foundation's auditors are authorized to review donor and prospect records as required for the purposes for which they are engaged.
 - e. *Fund Agreements.* Fund agreements are considered strictly confidential and are not public documents. The particulars of a fund agreement will not be shared with the general public or with grant recipients of the fund without the express consent of the donor or fund advisor unless the sharing of these details is essential for the fund to be administered as desired by the donor. A fund description may be included in various Community Foundation publications unless the donor has requested fund anonymity.
3. **Anonymous Gifts.** Community Foundation is authorized to accept anonymous gifts and will handle them appropriately. The name of the donor and size of the gift may be withheld from the Board of Directors at the President & CEO's discretion, if requested by the donor. When made known to the board, each member will respect the anonymity of any such gift.
 4. **Publication of Donor Names:** Unless otherwise requested by the donor, the names of all individual donors may be printed in the Community Foundation's annual report or in other appropriate publications. The Community Foundation will not publish the amount of any donor's gift without the permission of the donor. Unless otherwise specified in the document, donors making gifts to the Community Foundation by bequest or other testamentary device are deemed to have granted such permission.
 5. **Giving Categories.** If giving categories have been stipulated for a specific fund drive, challenge grant, or project, or as part of the Community Foundation's ongoing recognition program, the donors, unless they otherwise specify, are deemed to have given permission for the Community Foundation to publish their names associated with the particular giving category. Similarly, the Community Foundation may publish giving categories associated with donor names in various Community Foundation publications unless a donor specifies otherwise.
 6. **Public Disclosure:** The Community Foundation will comply with both the letter and spirit of all public disclosure requirements, including the open availability of its Form 990 tax returns. This Donor Confidentiality Policy shall not be construed in any manner to prevent the Community Foundation from disclosing information to taxing authorities or other governmental agencies or courts having regulatory control or jurisdiction over the Community Foundation. However, all staff, volunteers, and contractors must hold strictly confidential all information of a private nature, including, but not limited to, all items explicitly discussed in this policy.
 7. **Consequences of Policy Violation:** Violations of the Confidentiality Policy are considered very serious, and may result in disciplinary action, up to and including dismissal for employees or contractors, or removal from the board or any volunteer committee.



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DONOR BILL OF RIGHTS

Greater Tacoma Community Foundation subscribes to the Donor Bill of Rights which 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.

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 not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

1. 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.
2. 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.
3. To have access to the organization's most recent financial statements.
4. To be assured their gifts will be used for the purposes for which they were given.
5. To receive appropriate acknowledgement and recognition.
6. To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.
7. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
8. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
9. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share. **(The Community Foundation never sells, rents, shares, or trades its mailing or donor lists.)**
10. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

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