

Standard C2: Foundation’s Donor Lists Policy

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Date to be reviewed:	January 2024
Status	Every three years
Key Contact Regarding Policy:	Executive Director

Definitions:

Need to Know - Within this policy “need to know” is defined as the requirements of an individual or committee to have personal information of donors depending on their responsibilities assigned with the discretion of the Executive Director. This includes members of the Foundation staff, fundraising committee and /or volunteers carrying out fundraising activities.

Personal Information - Information about an identifiable individual, including name, preferred address, phone number and other contact information.

Donor Lists Policy: The Cobequid Health Center Foundation (CHCF) values its donors/prospective donors and takes every measure possible to safeguard the personal information entrusted to the Foundation. This policy identifies that the CHCF does not share, trade, lend or rent its donor lists or any other information with any other organization.

Distribution: CHCF Board of Directors, staff, volunteers and all other stakeholders. The policy is available to the public on the Foundation's website. In addition an individual can request this policy from the Foundation's office.

Procedure: The Foundation believes that the following measures taken by its dedicated staff safeguards any personal information including the Foundation's donor lists entrusted to the foundation:

1. Collection of Donor Information: Every time an individual makes a donation to the Foundation or participates in a program or event their information gets recorded in the Foundation's secure database and becomes part of the Foundation. The nature of information is only limited to the purpose of which it is identified by the Foundation as necessary at the time of collection. All the information is collected by fair and lawful means, with consent of the interested person.
2. Storage of the Donor Information: The Foundation adheres to the **Donor Bill of Rights** which is committed to handling personal information with respect and confidentiality. The Foundation recognizes that in limited circumstances it must ensure such protection which is up to the standards of the **Personal Information and Electronic Documents Act (PIPEDA)**.

Personal information of the donors (including title, name, address, telephone number, email address, giving history) is stored in a password protected database and manual filing system, behind the locked offices of CHCF. Further, access is limited to a "need to know basis".

All staff members agree to a confidentiality clause at the time of signing their employment contract. Volunteers/ Board of Directors requiring access to our donor database must sign a Volunteer Confidentiality Agreement.

3. Use of the Donor Information: The donor information collected by the Foundation will be used for solicitation practices such as fundraising campaigns, donation requests and events. Together this contributes towards the betterment of the health services for our community and the surrounding area.

Personal information will only be used for the purpose in which it was collected, except with the consent or by the requirement of the law. The duration for which the personal information is retained will depend on the time required to complete those objectives.

The main reason the Foundation collects personal information is to produce tax receipts. These receipts must include information as determined by Revenue Canada Policies. Here are the details of what the CRA requires:

For gifts of cash:

- the full name and address of the donor
- the amount of the gift
- the value and description of any advantage received by the donor
- the eligible amount of the gift

For non-cash gifts, these additional elements:

- a brief description of the property transferred to the charity
- the name and address of the appraiser (if property was appraised)
- the deemed fair market value of the property in place of amount of gift above

If the Foundation wants to use the personal information for a different purpose, it shall do so by notifying the individual (interested person) in a documented form and it must seek the individual's consent for the same.

CHCF does not share, trade, lend or rent its donor lists or any other information with any other organization.

4. Destruction of the Donor Information: The Foundation is bound by legislative guidelines and all information is stored for a minimum of 7 years and then securely destroyed.

More extensive information regarding Donor Information is laid out in the Cobequid Health Center Foundation's Privacy Policy which is available to the public on the Foundation's website.

Related Documents:

- Foundations Privacy Policy;
- Foundations Fundraising Policy

References:

- Imagine Canada Fundraising Policies, August 2012
http://www.imaginecanada.ca/sites/default/files/www/en/ethicalcode/ec_handbook_2011_en.pdf
- Developing Fundraising Policies and Procedures, Barbara L. Ciconte, CFRE, Association of Fundraising Professionals
<http://www.afpnet.org/files/contentdocuments/9%20developing%20fundraising%20policies%20and%20procedures.pdf>