

## C2: Foundation's Donor Lists Policy

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<b>Frequency:</b>	Every three years
<b>Key Contact Regarding Policy:</b>	President & CEO

### **Donor Lists Policy:**

The Cobequid Health Centre Foundation (CHCF) values its donors/prospective donors and takes every measure possible to safeguard the personal information entrusted to them. 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. An individual can also request this policy from the Foundation's office.

### **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 as determined at the discretion of the President & CEO. This includes members of the Foundation staff, fundraising committee and/or volunteers carrying out fundraising activities.

*Personal Information* – Identifiable information about an individual, including name, preferred address, phone number, other contact information and more.

**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 donates 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 this information is limited to the purpose 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 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 titles, names, addresses, telephone numbers, email addresses, 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".

Once manual files are completed and/or stored digitally they are destroyed in a confidential manner.

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

3. Use of 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 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. Details of what the CRA requires include:

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.

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, rent, or sell its donor lists or any other information with any other organization.**

4. Destruction of 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 Centre Foundation's Privacy Policy which is available to the public on the Foundation's website.**

**Related Documents:**

- Privacy Policy
- Fundraising Policy