



lakes center
FOR YOUTH & FAMILIES

Guiding Successful Futures

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Section #VI Policy# 103 **BOARD POLICIES:**

DONOR CONFIDENTIALITY AND SOLICITATION POLICY

Lakes Center for Youth & Families (LC4YF) recognizes that the operation of the organization requires the maintenance and management of extensive donor and prospect records. Donor records often contain sensitive information that has been shared with or developed by LC4YF staff on a confidential basis. "Records" means all files, including electronic data, containing information on donors or prospective donors to LC4YF.

The purpose of this policy is to state the position of LC4YF on donor confidentiality and donor anonymity.

I. DONOR PRIVACY: SHARING PROSPECT AND DONOR NAMES/INFORMATION AND CONFIDENTIALITY OF RECORDS

- A. The executive director shall be responsible for maintaining the confidentiality of donor and prospect records and will ensure that all staff have clear direction regarding the confidentiality of records through the establishment of appropriate operating procedures. He/she may, in his/her discretion, make all or part of any record available to staff members or volunteers if essential to them in executing their responsibilities. Disclosure decisions will honor the wishes of donors related to disclosure unless a larger legal issue is related.
- B. To carry out its responsibilities, the Board of Directors and staff may need to review donor/prospect records. All directors and staff shall respect the Organization's significant interest in protecting the sensitive nature of those records and shall maintain these policies for donor confidentiality.
- C. The Organization's auditors are authorized to review donor and prospect records as required for the purposes for which they are engaged.
- D. Fund agreements are considered "strictly confidential information" and are not public documents. Particulars of a fund document will not be shared with the general public or with fund recipients unless the donor has granted permission to do this or unless these details are essential to be shared in order for the fund to be administered as desired by the donor.
- E. LC4YF does not share prospect or donor information with other agencies or entities.
- F. LC4YF destroys all credit card numbers upon completion of the transactions. LC4YF does not keep a record of the credit card number.

II. ADDITION TO SOLICITATION LIST

- A. Any individual, business or civic organization deemed appropriate by the Board of Directors, Executive Director, or Lakes Center for Youth & Families (LC4YF) staff may be added to the LC4YF's development database for fundraising or solicitation purposes.
- B. All individuals, businesses and civic organizations making a gift to LC4YF will receive annual appeals for additional support unless the donor specifically notes that a contribution is a one-time donation.

III. REMOVAL FROM SOLICITATION LIST

- A. Any individual, business or civic organization may request removal from LC4YF's solicitation list either verbally or in writing at any time. The constituent's name will be removed immediately from LC4YF's fundraising database.

IV. ANONYMOUS GIFTS

- A. The executive director is authorized to accept anonymous gifts to the Organization. In the event the executive director is uncertain about the desirability of accepting an anonymous gift, he/she shall consult with the Executive Committee.
- B. The executive director shall disclose to the Executive Committee, upon a request by a majority of the Executive Committee, the names of any anonymous donors.
- C. LC4YF will respect any donor's request that their gift remain anonymous.
- D. The acknowledgement letter will include reassurance to the donor that the gift has been recorded as "anonymous," and that their name will not appear in publication.
- E. The donor at any time may request that the anonymous designation be removed from the gift.

V. HONOR/MEMORIAL GIFTS

- A. The names of donors of memorial or honor gifts may be released to the honoree, next of kin, or appropriate member of the immediate family, unless otherwise specified by the donor.
- B. Gift amounts are not to be released without express consent of the donor.

VI. WEB-SITE

- A. LC4YF's Solicitation and Donor Privacy policy will be available on the agency's website: www.lc4yf.org and by verbal or written request.

Confidentiality Agreement for Board Members, Associate Board Members, Staff, and Private Consultants: See attachment Policy #103

Approved: **9/23/2015**