

## **LIFESPAN Fund Development Policies and Procedures**

Taken from the Policy and Procedure Guidelines

## **Privacy of Donor Information**

Every donor has the right for their gift to remain confidential. A donor has the right to request that their gift be listed as anonymous. If the gift is given as anonymous an appointed staff person, staff from accounting that comes in contact with the bank transaction, and the CEO will be the only people who know of the origin of an anonymous gift. LIFESPAN will only share donor information on a need to know basis. Volunteers who are actively involved in the fundraising and cultivating process of specific donors will be given confidential donor giving history information.

#### **Database Management**

LIFESPAN will keep all donor information in the database confidential. A donor can review his or her donor record at any time. Prospective donors in the database who have not given a gift in five years will be included on a list to be reviewed by the department staff and the leadership team. Recommendations will be made to remove prospects that have received mail and have not responded in five years. Maintenance to the database will be done on a quarterly basis to include removal of duplicates, address changes, relationship/note update, pledge updates and review of classification codes.

## **Identity Theft**

At LIFESPAN necessary steps are taken at all times to ensure that all donor and volunteer personal data is kept in a confidential manner.

#### Volunteer Information

All volunteer information will be kept in a locked drawer or cabinet and will not be shared with anyone outside the fund development department or appointed program liaison. Hard copies of both current and inactive volunteer records will be kept for seven years. At that time, disposal of old records, inactive volunteer applications, etc. will be disposed of in a Recycle/Shred-It certified disposal unit.

# **Donor** Information

No one other than a fund development staff member will have access to the donor database. Raisers Edge software will be closed down when the staff member leaves their office. All donors have a right to view their personal file within the donor database. Donors will be given access to their file with a staff member present.

#### In-Kind Donor Information

All in-kind donor information will be kept in a locked file drawer or cabinet and managed by the executive administrative assistant.

Rev. 12/11 Amee Lee