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# *Donor Privacy Policy*

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## **Purpose**

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The Donor Privacy Policy is intended to ensure all information concerning donors or prospective donors, including their names, addresses, and telephone numbers, the names of their beneficiaries, the amount of their gift, etc, shall be kept strictly confidential by Lifeworks, its staff and volunteers, unless permission is obtained from donors to release such information.

## **Scope**

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This policy applies to all Lifeworks directors, Board committee members, officers, employees, and volunteers (collectively "Lifeworks Personnel").

## **Policy**

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Lifeworks is committed to respecting the privacy of donors. The types of donor information that it collects and maintains from prospecting efforts and received donations are as follows:

- Contact information: name, address, telephone number, and email address
- Donation details including amount, restrictions, methods of payment
- Information of events attended, publications received, and special requests for program information
- Information provided by the donor in the form of comments and suggestions
- Giving potential and affinity to give

Lifeworks uses donors' information to understand their interests in its mission and to update them on the organization's plans and activities. It is shared with Lifeworks Personnel only as required.

Lifeworks does not sell, trade, or share donors' private information with other organizations.

For those who do not wish to be included on a mailing list or who would like to update or change their information should contact Lifeworks at 2965 Lone Oak Drive, Suite 160, Eagan, MN 55121 or 651-454-2732.

## **Donor Bill of Rights**

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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 assure 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 donations is handled with respect and with confidentiality to the extent provided by law or as requested by the donor.
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.
10. To feel free to ask questions when making a donation and to receive prompt, truthful, and forthright answers.
11. To have access to this Policy on [www.lifeworks.org](http://www.lifeworks.org) and by requests direct to Lifeworks at 2965 Lone Oak Drive, Suite 160, Eagan, MN 55121 or 651-454-2732.

## **Discontinuing Contact upon Request**

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Lifeworks will communicate with donors according to their expressed preferences whenever possible. Lifeworks will discontinue or change the method used to contact any person upon that person's oral or written request to Lifeworks at 2965 Lone Oak Drive, Suite 160, Eagan, MN 55121 or 651-454-2732.

Lifeworks will maintain a record of all requests by persons who indicate to Lifeworks that they do not wish to be contacted by or on behalf of Lifeworks.

Lifeworks recognizes that peer-to-peer fundraising on behalf of Lifeworks may happen without our knowledge. This policy does not prohibit contact by an individual or group engaging in peer-to-peer fundraising - even if the person being contacted has requested to be placed on the Lifeworks "do not contact" list.

## **Rights & Responsibilities**

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All Lifeworks Personnel are responsible for adhering to this Policy when engaging with donors on behalf of Lifeworks. Disregarding or failing to comply with this Policy could lead to disciplinary action, up to and including, possible termination.

## **Resources**

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Association of Fundraising Professionals Best Practices for Accountability and Transparency

Responsible Board Committee	Development
Responsible Vice President	Advancement
Committee Approval	6/19/19
Board Approval	7/29/19