

# DONOR PRIVACY POLICY

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## **Purpose**

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, and any other information related to their donation activity, shall be kept confidential by Lifeworks Services, Inc. (“Lifeworks”), its staff and volunteers, unless permission is obtained from donors to release such information.

## **Scope**

This policy applies to all Lifeworks Directors, Board committee members, employees, and volunteers (collectively “Lifeworks Personnel”).

## **Policy**

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(es), 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 donor information to understand interests in its mission and to update them on the organization’s plans and activities. It is shared with Lifeworks Personnel on a “case-by-case” basis.

Lifeworks has vendors that assist with processing and managing donations and donor data. We give these vendors access to donor data. Our vendors are bound by strict confidentiality rules and are permitted to use donor data only to support Lifeworks’ operations.

We will use donor information to comply with the law or in the good faith belief that such action is necessary to conform to the requirements of law or comply with legal process served on us.

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 Advancement at 6636 Cedar Ave S, Suite 250, Richfield, MN 55423 or 651-454-2732.

## **Donor Bill of Rights – See Exhibit A**

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 request to Lifeworks at 6636 Cedar Ave S, Suite 250, Richfield, MN 55423 or 651-454-2732.

## **Discontinuing Contact Upon Request**

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 verbal or written request to Lifeworks at 6636 Cedar Ave S, Suite 250, Richfield, MN 55423 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 and Responsibilities**

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**

Donor Bill of Rights adapted and published with permission from the Association of Fundraising Professionals, granted on 10/27/2025. See attached Exhibit A.

Responsible Committee:	Advancement
Responsible Staff:	Chief Advancement Officer
Committee Approval Date:	November 12, 2025

# A DONOR BILL OF RIGHTS

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**DEVELOPED BY:**



Association of Fundraising Professionals (AFP)



Association for Healthcare Philanthropy (AHP)



Council for Advancement and Support of Education (CASE)



Giving Institute: Leading Consultants to Non-Profits

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## I

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.

## II

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.

## III

To have access to the organization's most recent financial statements.

## IV

To be assured their gifts will be used for the purposes for which they were given.

## V

To receive appropriate acknowledgement and recognition.

## VI

To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.

## VII

To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.

## VIII

To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.

## IX

To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.

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To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.