**Donor Confidentiality Policy and Bill of Rights**

Budget and Financial Management Assistance (BFMA) strongly supports protecting the privacy of its donors and the confidentiality of information concerning them. Donor records, both hard copy and electronic, and other donor information will not be sold and will not be shared with other organizations. Access to donor information is limited to the Executive Director, the chief financial officer, volunteers and staff members who acknowledge donations or solicit donations. All BFMA staff and volunteers must maintain the confidentiality and privacy of donors and may not divulge donor information.

This policy of guides the actions of the Board of Directors, the Executive Director, staff and volunteers who serve BFMA and insures the confidentiality of donors and potential donors regarding their transactions with BFMA.

We endorse and adhere to the Donor Bill of Rights, which was created by the American Association of Fund Raising Counsel (AAFRC), Association for Healthcare Philanthropy (AHP), the Association of Fundraising Professionals (AFP), and the Council for Advancement and Support of Education (CASE). It has been endorsed by numerous organizations and reads as follows:

**The Donor Bill of Rights**

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 ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the nonprofit organizations and causes they are asked to support, we declare that all donors have these rights:

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 donation 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.

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

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| |  | | --- | |  | | |  |  | | --- | --- | |  |  | |  | | | **PROCEDURES:**  **Confidentiality of Records:**  The Executive Director is responsible for maintaining the confidentiality of current donor and prospective donor records and will ensure that all staff has clear direction regarding the confidentiality of records as reflected in the Code of Ethics and Financial Procedures Manual. The Executive Director may, at his or her discretion, make all or part of any donor record available to staff or Committee members or volunteers if essential to them in executing their responsibilities. Any such decision will honor the wishes of donors related to disclosure unless a larger legal issue is involved.   **Publication of Donor Names:**  The names of all individual donors will be listed in the annual report and/or in similar public relations communications. Exceptions will be made for any donor who specifically requests anonymity.  **Anonymous Gifts:**  The Executive Director is authorized to accept anonymous gifts to BFMA. In the event the Executive Director is uncertain about the desirability of accepting an anonymous gift, he/she will consult with the Board of Directors before doing so.   The Executive Director will disclose to the Board of Directors the names of any anonymous donors.  **Distribution of Policy**:  The Donor Confidentiality Policy will be posted on the website of BFMA and will be available to anyone upon request.   **Adoption:** This policy has been adopted by the BFMA Board of Directors at its meeting on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.  Date    Signature of Board Secretary | |  | |  |