

## CHATHAM-KENT HOSPICE FOUNDATION

<b>Section</b>	<b>Policies and Procedures</b>	<b>Fundraising</b>	
<b>Title</b>	<b>Privacy/Donor Record Management</b>		
<b>Manual</b>	<b>Board of Directors</b>		
<b>Policy Number</b> CKHF 4	<b>Date of Issue</b> October 26, 2016	<b>Revised</b> <i>March 28, 2018</i>	<b>Reviewed</b> <i>May 27, 2020</i>

### PURPOSE:

This policy outlines the collection, use and maintenance of donor records including confidentiality and privacy.

### POLICY:

Chatham-Kent Hospice Foundation observes the following practices when collecting donor information, maintaining and using confidential donor records, and protecting donor anonymity:

- We honour donors' and prospective donors' requests to:
  - Remain anonymous
  - limit the frequency of contact;
  - not be contacted by telephone or other technology;
  - no longer receive printed material; and
  - discontinue contact.
- We respect the privacy of donors. Donor records are kept confidential to the greatest extent possible. Donors have the right to see their own donor record and to challenge its accuracy.
- We do not sell, rent, exchange, or otherwise share our donor list.
- We guard against making unwarranted or intrusive inquiries into a donor's or prospect's gift history or personal life and gather only information that is relevant and necessary to our fundraising efforts;
- We make all reasonable efforts to ensure that the personal information we collect is complete and accurate;
- We require a donor's consent before confidential information is released to any outside party; We have established and follow reasonable time periods for the retention and the secure disposal of donor information;
- We have established security safeguards to protect donor information and limit access to donor files;
- We recognize that our duty to ensure the confidentiality of donor records continues even after our relationship with a donor or prospect has ended;

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### PROCEDURE:

Donor information is recorded in Chatham-Kent Hospice Foundation's donor database as soon as it is practical upon receiving a donation.

The database is maintained by the approved Foundation staff. Training is provided and upgraded periodically to maintain industry best practices.

Access to the database is password protected. The Executive Director or designate is responsible to investigate and rectify any security or privacy breaches.

Donor wishes regarding privacy and anonymity are collected immediately and noted in the database.

All Chatham-Kent Hospice Foundation's donor data is stored on a secure central server and backed up daily.

As with all financial data, best practice guidelines for maintenance will be followed:

- Confidential electronic financial information will be held securely and only until payment has been processed
- Personalized donor financial data will be held for 2 years
- General financial data will be maintained for 7 years
- Donor tracking data will be held indefinitely unless otherwise advised by the donor.

All confidential data will be disposed of safely and securely following industry best practices to ensure no unintended privacy breaches.