

## Armory Youth Project

### Stewardship of Donor Information Policy

AYP recognizes that efficient operation requires the maintenance and management of donor and prospect records in paper and digital form. These records often contain sensitive information that has been shared with or developed by the staff and Board Fundraising Committee on a confidential basis.

Additionally, some donors and prospects are attracted to AYP on the basis of its ability to assure temporary or permanent anonymity. This policy codifies the position of AYP on anonymity and donor/prospect records. "Records" are defined to mean all files, including electronic data, containing information on donors or prospective donors to the Foundation.

#### How we use it

AYP collects, uses and discloses personal information concerning our donors for the following reasons:

- To establish a relationship and communicate with donors
- To understand who our donors are and how we may improve our services to meet their preferences and expectations
- To process a donation (e.g. a credit card transaction)
- To issue a tax receipt and acknowledgement letter or make thank-you calls
- To recognize contributions
- To meet requirements imposed by law

#### Confidentiality of Records

The Executive Director and Fundraising Committee Chair shall be responsible for maintaining the confidentiality of donor and prospect records. They may, at their discretion, make all or part of any record available to staff members or fundraising volunteers to assist them in executing their responsibilities. AYP auditors are authorized to review donor and prospect records as required for the purposes for which they are engaged.

Gift agreements are considered strictly confidential information and are not public documents. Particulars of a gift agreement will not be shared with the general public unless the donor has granted permission to do so.

AYP does not share or make available lists of donors to outside organizations for any purpose without the express written approval of the Executive Director and the Executive Committee of the Board.

#### Kinds of Information

AYP defines "personal information" as information that can be used to distinguish, identify or contact a specific individual. It does not include publicly available information such as business contact information, names,

addresses and telephone numbers as published in public sources. Credit card information is handled by a secure third-party host and used only to process payment initiated by a person contacting AYP. This information is not stored by AYP.

### **Publication of Donor Names**

Unless otherwise requested by the donor in writing, the names of donors may be listed in AYP annual reports, on the website and/or in similar public relations communications. AYP will not publish the specific amount of any donor's gift without the permission of the donor. As required by law, AYP must list all donations of \$5,000 or greater, with corresponding donor information, on its tax returns. Donor information is redacted in the public versions of these tax returns.

Donors making gifts to AYP by bequest or other testamentary device are deemed to have granted such permission, unless otherwise noted.

Adopted by the AYP Board [date]

