

UNITED WAY OF YELLOWSTONE COUNTY DONOR CONFIDENTIALITY POLICY

United Way of Yellowstone County (UWYC) values and respects the confidentiality and privacy of donors to United Way of Yellowstone County and adheres to the best practices outlined by the Association of Fundraising Professionals' Donor Bill of Rights.

UWYC protects donor and constituent information in accordance with its Confidential Information Security and Protection Policy. This Donor Confidentiality Policy is intended to supplement all applicable laws governing the confidentiality and privacy of information.

Collection and use of information

Donor records often contain confidential and personal information. "Records" means all files, including electronic data, containing information on donors or prospective donors to UWYC. UWYC defines "personal information" as information that can be used to distinguish, identify, or contact a specific individual, such as name, address, date of birth, and lifestyle information. 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 UWYC. This information is not stored by UWYC.

UWYC will use donor confidential and personal information to:

- Establish a relationship and communicate with donors
- Understand who our donors are and how we may improve our services to meet their preferences and expectations
- Process a donation (e.g., a credit card transaction)
- Issue a tax receipt
- Recognize contributions
- Meet requirements imposed by law

Confidentiality of records

The CEO is responsible for maintaining the confidentiality of donor and prospect records and ensures that staff have clear direction regarding the confidentiality of records through the establishment of appropriate operating procedures. The CEO may make all or part of any record available to staff, Board of Directors, or volunteers if essential to them in executing their responsibilities.

UWYC will not use nor disclose a donor's confidential information without donor consent unless mandated by a court order. Gift agreements are considered 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 this.

UWYC will not sell, share, or trade personal information for third party fundraising or marketing purposes.



UWYC's auditors are authorized to review donor and prospect records as required for the purposes for which they are engaged.

Publication of donor names

The names of donors may be listed in UWYC's annual report, on the website and/or in similar public relations communications. Exceptions will be made for any donor who specifically requests anonymity. UWYC will not publish the specific amount of any donor's gift without the permission of the donor. Donors making gifts to UWYC by bequest or other testamentary device are deemed to have granted such permission, unless otherwise noted.

Honor/memorial gifts

The names of donors of memorial or honor gifts may be released to the honoree, next of kin or individual(s) designated by the immediate family, unless otherwise specified by the donor. Gift amounts are not to be released without express consent of the donor.