

**PROCEDURE for CONFIDENTIALITY of DONORS**

<b>Distribution:</b> All Board Members and Staff	<b>Effective:</b> February 18, 2009
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**Purpose:** To protect the privacy of JF&CS supporters, the following safeguards and processes are in place.

**Policy:** Jewish Family & Career Services, in the course of raising funds for agency operations and programs, must share information with staff, volunteers and board members from time to time. The sources of information placed in a donor record come from publicly published sources, non-confidential conversations and correspondence with donors and annual donor surveys. The Chief Development Officer, with oversight from the Chief Executive Officer, is responsible for implementing the Procedure for Confidentiality of Donors.

**Requirements:**

1. Donor personal information is gathered and kept within the agency database, the software for which is Raisers Edge, made by Blackbaud. Only 7 people have access to Raisers Edge within the agency; The Chief Development Officer, the Associate Development Director, the Database Coordinator, the Special Events Coordinator, the Development Assistant, the Manager of Volunteer Services and the Chief Executive Officer. No donor information is available online.
2. Except for Development staff listed in (1), no one else in the agency or any volunteer is ever permitted to view all donor records.
3. All volunteers and outside vendors who participate in fundraising efforts for the agency are required to sign a Statement of Confidentiality in which they agree not to disclose any information about the agency, its processes and its donors. This group includes direct mail facilities and consultants, volunteer consultants and other vendors who may come in contact with the JF&CS database.
4. In carrying out fundraising assignments, only the minimum possible information necessary for the volunteer, vendor or staff person's effective dispensation of their duties is provided. Information provided is clearly marked "Confidential" and the agency makes conscientious efforts to retrieve all information once campaigns are completed. The information is then shredded.

5. In cases where donors request anonymity, all efforts are made to limit the number of agency employees who are made aware of the donor's name. In all cases, the name is shared only on a "must know" basis in order to acknowledge, receipt and otherwise account for such a donation. As per donor's request, the Agency maintains donor anonymity in its database by coding the donation record either at the donor level or at the gift level thus triggering the "Anonymous" listing rather than the donor's name in any agency publication, newsletters, articles or other publicly available documents regarding the organization prepared for the purpose of providing donor recognition.